COVax$_{ON}$ Client Check-In Job Aid

Target Role: Check-In Clinician / Admin

Role Description:

Records client information and checks client into COVax$_{ON}$ system

Permission Level: COVax Site Staff

- Client Search
- Edit-Access for Client Profile
- Read-Only Access to Administer Dose Functionality
- View Dashboards
- Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report

Legend

Pencil Icon
Click this to edit any data fields

Red Asterisks
Indicates a required field

All COVID public health measures must be followed in alignment with this process.

Your profile has a defined access level and is associated with an Authorized Organization, which means you can perform the above activities within COVax$_{ON}$ on behalf of that Authorized Organization (AO). For further details on setting up your profile, refer to the "Login, Logout, and User Settings" job aid.

For any assistance, please email: covaxonsupport@ontario.ca

This document provides training on how to use the COVax$_{ON}$ system for the vaccine management process. Within the clinical package that each site received, there are additional forms and documentation that you will need to use alongside the COVax$_{ON}$ system.

Data Privacy Disclaimer:
Users with access to COVax$_{ON}$ can see the demographic details and health numbers 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.

The system records detailed audit transaction logs that inform the Ministry of Health 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.

High Level Check-in Process

1. Locate Client Record in COVax$_{ON}$	2. Client Check-In	3. Gather Additional Client Information	4. Create New Client Profile in COVax$_{ON}$
When client arrives, search for the client in the COVax$_{ON}$ system: a) Through the VE tab b) Through Client Search tab	Check in the client, requesting data and communication consent	Ensure all mandatory fields are populated and add any additional information, including Sociodemographic information	If you cannot find the client in the system, create the new client profile (if approved by the location)

Client Record – Required and Encouraged Fields

Site Staff must ensure that Client records are fully accurate and have all the required information to ensure client identities can be properly validated along the process. Use the following information when populating fields on a client's profile:

Required fields are:

- Last Name - The First Name is not required, but should be entered
- Gender
- Date of Birth

Highly Encouraged Client Information Fields are:

Field	Details
Health Card Number (10-digit number only)	This is the best defense against creating duplicate clients and validating client identify to avoid activities being conducted on incorrect client profiles. If a client does not have a Health Card number, it is encouraged to request an "Alternative ID" (i.e. drivers' licence, passport, birth certificate, etc.) to verify their identity.
Vaccination Event	This field is critical as it enables the linkage to the inventory administered to the client, information on the dose admin record, information on the proof of vaccination receipt, etc. Vaccination Events are created prior to vaccinations taking place at a designated location as part of the planning phase. Refer to the "Creating Vaccination Events" job aid for details on how this is done.
Institution	Should be populated with the LTCH/RH/NH name for residents and staff.
Contact Details	If the client consents to providing their contact details, it is highly encouraged to obtain this information. The "Preferred Method for Communication" should also be selected if contact details are provided.
Address	It is recommended to enter postal code at a minimum, full address when possible

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Primary Care Provider	The client's primary care provider should be populated when possible
Reason for immunization	This field should be populated when possible. If it is not populated on the client profile upon arrival, it will be asked during the check in process.

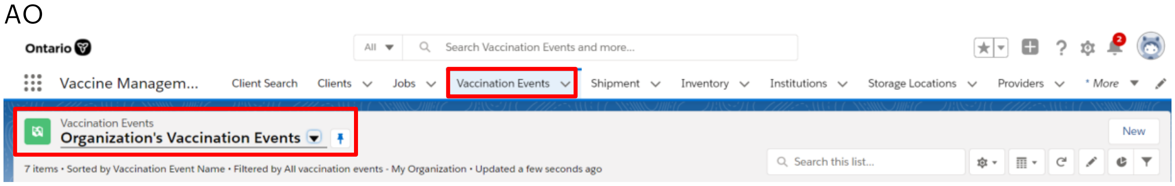
1a. Locate Client Records in COVaxON – from Vaccination Event

Description:

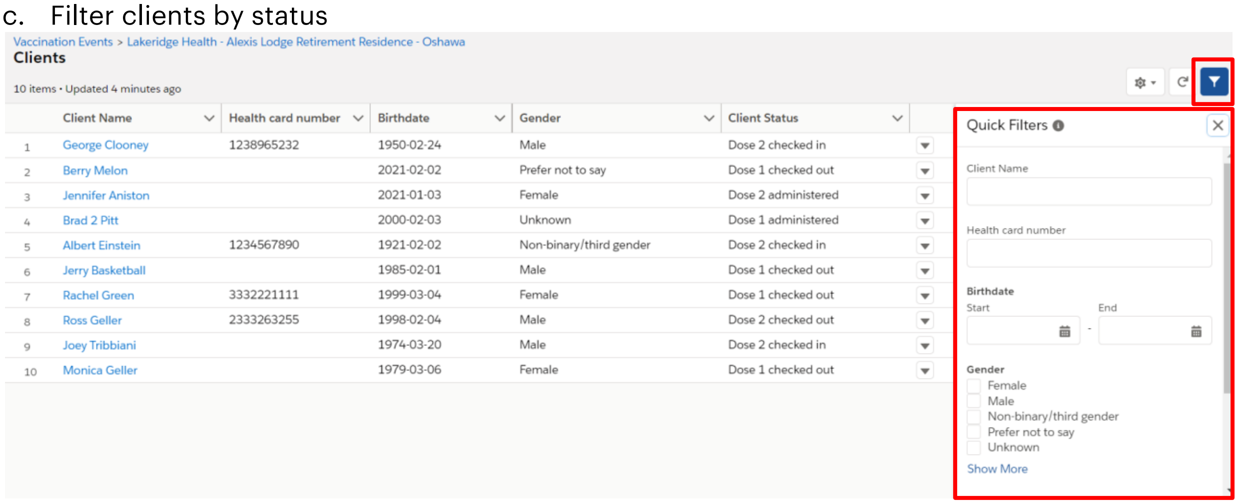
Once the client arrives at the check in station, verify that they have completed the COVID-19 assessment. Once verified, follow the steps below to locate the client record in COVaxON.

Search for the clients through the Vaccination Events tab:

1. Select "**Vaccination Events**" Tab.
2. Select "**Organization's Vaccination Events**" from the list options to see all vaccination events within your AO



3. Select the Vaccine Event
4. Scroll down to see a list of clients tagged to this Vaccination Event. Select "**View All**" to see further details
5. Select the filter icon
6. Enter the relevant filters. For example:
   a. Enter client name
   b. Enter client HCN
   c. Filter clients by status



7. Select "**Apply**". Select the desired client's name. Users can right click on client name hyperlink and open the client's profile in new browser window to avoid losing their spot on the Vaccination Event record.

Further Context

- If the search needs to be modified, the filters must be removed before applying new filters. Do this by selecting "Clear All Filter" and "Apply"

- If client is not found under the "**Vaccination Events**" tab, this indicates that their profile is not tagged to that Vaccination Event. Proceed to next section to search for the client.

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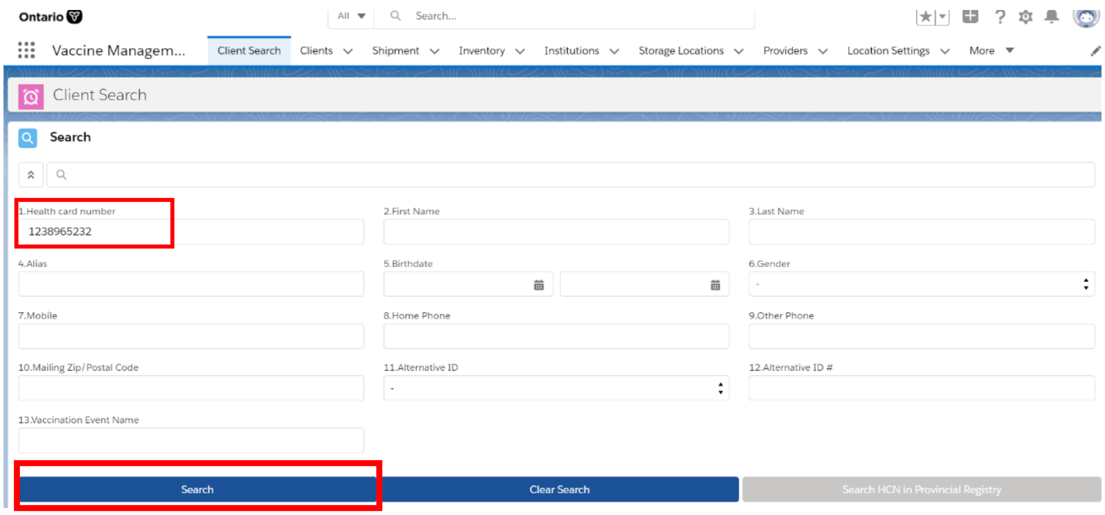
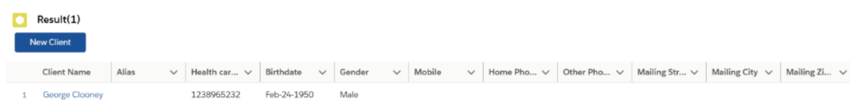
1b. Locate Client Records in COVaxON – from Client Search Tab

If you are unable to locate the client within the Vaccination Events tab, the client is not associated to that Vaccination Event and the client must be searched from the “Client Search” tab.

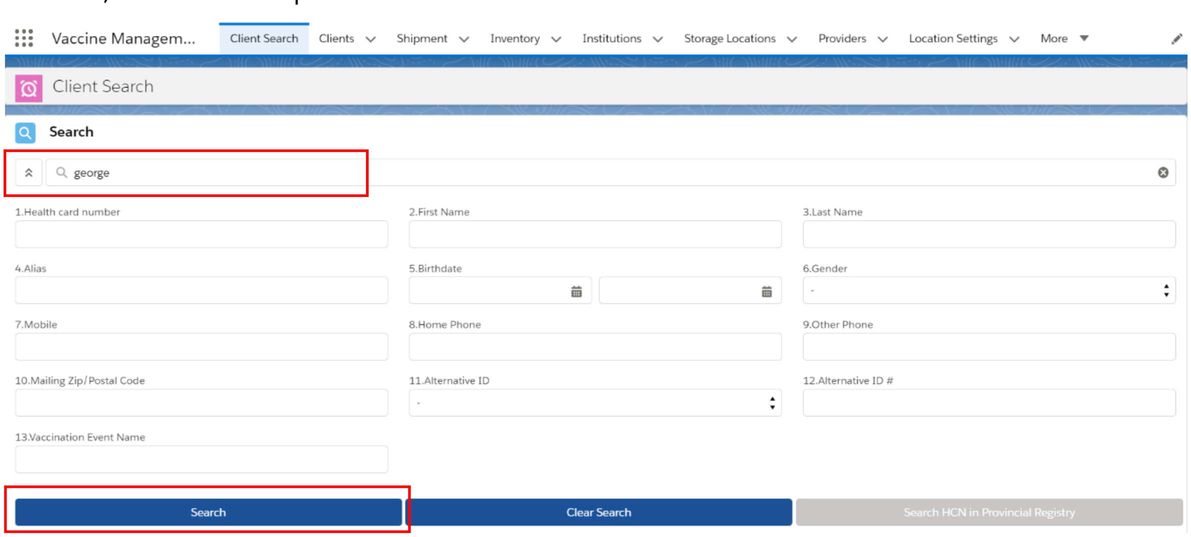
1. Go to the “**Clients Search**” tab
2. Enter the Client’s Health Card Number in the designated field



3. Select “**Search**”. If there are results produced, they will be populated below. Scroll down on this page to see the results.



4. Select the desired client’s name to bring you to their profile page and follow the steps in ***section 2: Client Check In.***
5. If the **client does not exist** after searching their health card number, or they do not have a health card number, use the following steps:
   - From the same “Client Search” tab, enter any key identifier of the client in the search fields (i.e. search for first or last name, date of birth, etc.)
   - It is recommended to search by 1 criterion (i.e.: last name) in the client search bar as opposed to multiple. This will return the most accurate results. The global search field at the top will find partial matches, whereas the specific fields must be exact.



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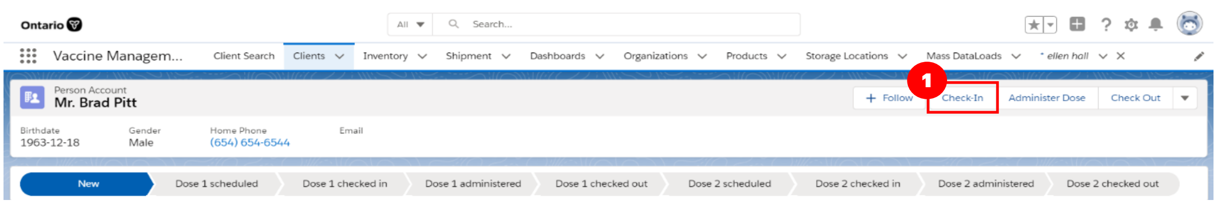
- Select “**Search**”. If there are results produced, they will be populated below. Scroll down on this page to see the results.
- If the client exists, select the desired client’s name to bring you to their profile page and follow the steps in ***section 2: Client Check In.***
- If the client does not exist after searching for any key identifier, a new client can be created. Refer to ***section 4: Creating a New Client Profile in COVaxON.***

2. Client Check-In

Description:

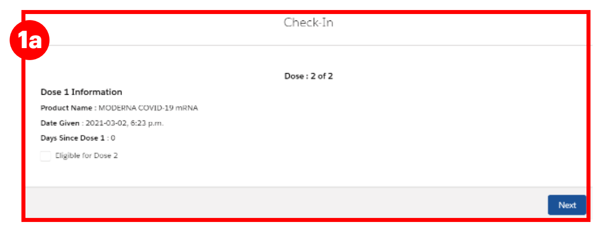
Once client profile has been located and opened in COVaxON, proceed with checking in the client.



How:

1. From the client profile, select the “**Check-In**” button on the top right

1.a) When checking in Dose 2 clients, a dose 1 information pop-up will appear. Review the first dose information; the product that was given for dose 1, ensure adequate days have elapsed since first dose, and check the box that they are eligible for second dose. Select “**Next**”.



2. Read 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.
3. Ensure COVID-19 assessment has been completed and check the box. This is a mandatory checkbox.
4. Obtain client consent for data collection. If the client does not consent, an offline process should be followed. See the “Further Details” section below.
5. Select a Reason for Immunization from the dropdown. This is a mandatory field. Select “**Next**”.
6. On the next screen, select “**Finish**”.

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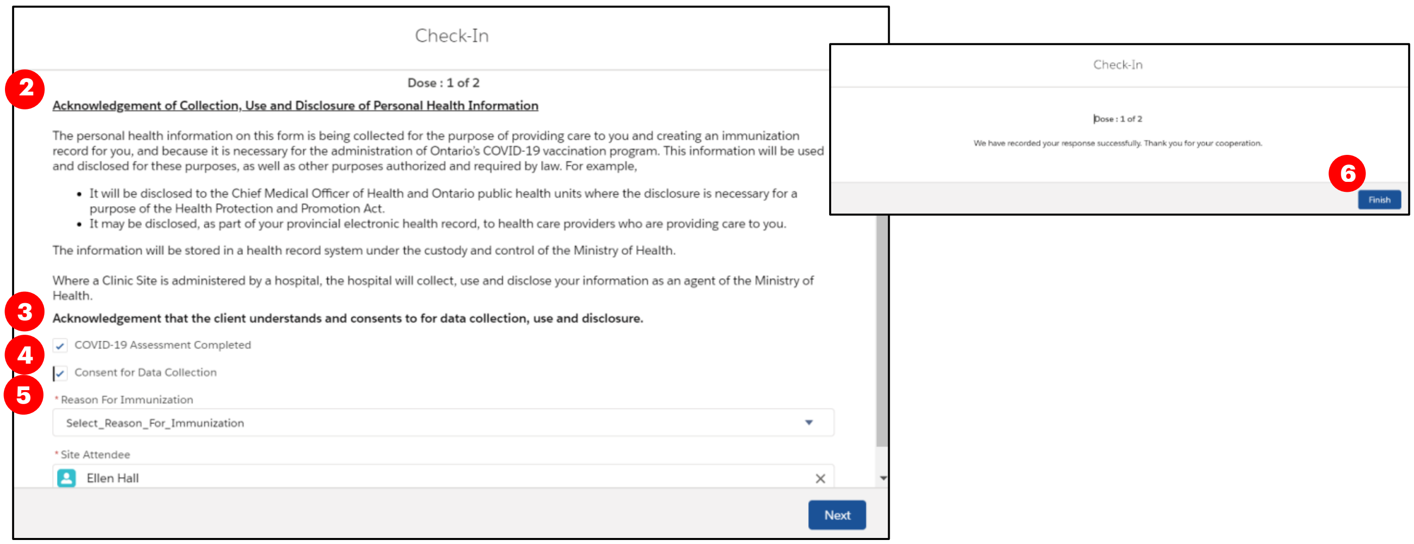


Further Context

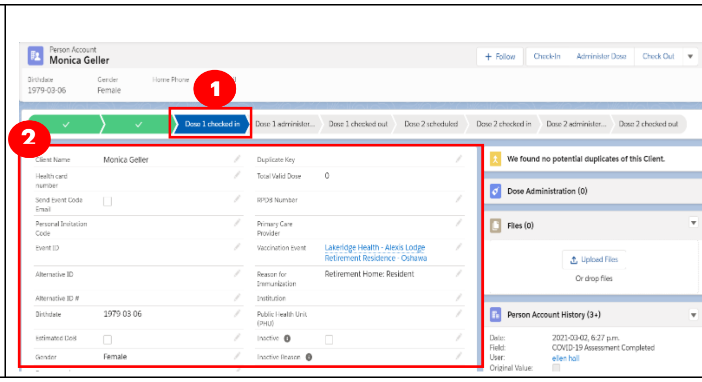
- It is very important to ensure that clients are successfully checked in. If not, the Vaccinator will not be able to Administer a Dose until the client is properly checked in.
- "**COVID-19 Assessment Completed**" this checkbox verifies that the client has completed their COVID-19 pre-screening before entering the location. Users should verbally ask the client if this assessment has been completed. This is a mandatory checkbox.
- "**Consent for Data Capture**" this checkbox indicates if the client is comfortable with their personal data being entered into the COVaxON system. This is not a mandatory checkbox. However, if the client does not consent, no further data should be entered in the COVaxON system and the offline paper process should be followed for vaccination (refer to the Offline Process in Module 1 section 5 of the "End to End Job Aid" for more details on this).
- The information entered on this check-in screen (checkboxes and "Reason for Immunization" drop down) will be automatically populated on the client profile page. The information can also be modified from the client's profile page if needed.

3. Gather Additional Client Information

Description: Once the client is checked-in, review/update any missing information on the client profile and ensure they are tagged to the correct Vaccination Event. Refer to the required and encouraged fields at the beginning of this job aid to ensure all of the pertinent information is captured.

How:

1. On the client profile, ensure the client's status is "**Dose 1 checked in**" (or dose 2 if applicable)
2. Using the pencil icon, edit search fields to ensure mandatory information is filled in and add any additional information
3. Ensure that the client's **Vaccination Event has** been populated accurately. Use the pencil icon to update and search for the relevant VE if needed.



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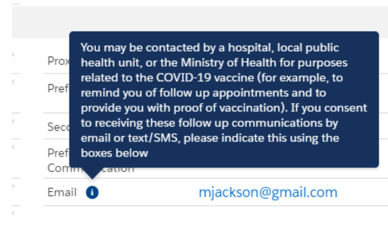
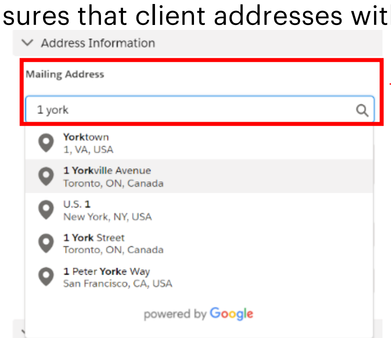
Further Context

- Populating client email/phone fields will allow the client to receive follow up communications (i.e. vaccination receipts can be emailed) & be contacted about COVID-19 related research. The "i" icon next to the email/phone number fields indicate the details of client consent. Users should review these details with clients before entering in their contact information. Once the client's information is entered, the corresponding consent boxes on the client profile should be updated. These checkboxes can be edited at a later date, if the client wishes to withdraw consent.



- If one of the "Congregate Living" values are selected from the "Reason for Immunization" field, or the client is a Long Term Care Home worker or resident, the Institution field should be populated on the client profile with the accurate Institution value.
- Public Health Unit (PHU) field will be auto populated based on the postal code that has been entered on the client profile. If the PHU that is auto populated is incorrect, the field will be editable once the postal code is entered.
- When populating the client address, Users should type the client's provided address into the global search bar. Once the correct address is selected, all appropriate address fields will be populated. This ensures that client addresses within COVaxON are entered accurately and completely.



Selecting an address from the global search field will auto-populate all address fields on the client profile

- It is very important to ensure the client is tagged to the correct Vaccination Event. Although the system will not prevent users from checking in clients at the incorrect VE, later in the client flow the Vaccinator will not be able to administer the dose if the client's VE is incorrect.
- "Reason for Immunization" field on the client profile is auto populated based on selection in check-in pop-up window (the previous step)
- For LTCHs/RHs, the email added to the client profile can be the email of a substitute decision maker or location directory email since the record of vaccination will be filed with client records.
- There is a report that shows a centralized view of all clients at a particular VE with their dose administration record status, client 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.

3a. Gather Sociodemographic Information on Client Profile

Description: After the client has been checked in, users will ask the client if they are willing to provide any Sociodemographic information. Use the following steps to populate data on the client profile. All COVax users except Inventory Managers can add sociodemographic information.

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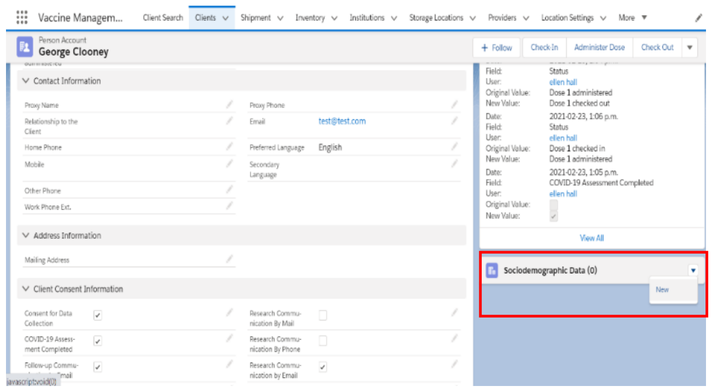
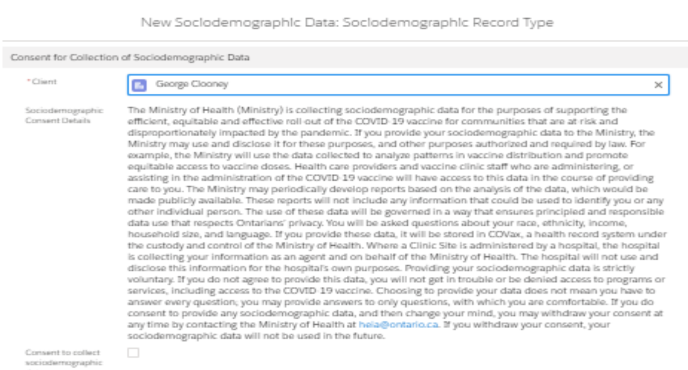
How:

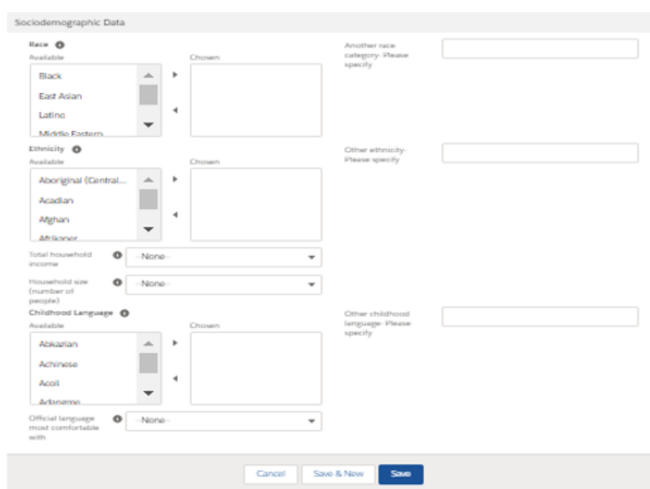
1. From the desired client profile, scroll down to the "**Sociodemographic Data**" section and select "**New**"



2. Read the disclaimer to the client, obtain consent for information collection, and populate following fields:

- **Client:** Auto-populated based on the client record selected
- **Consent:** Client must provide consent for the user to record sociodemographic details about them
- **Race:** 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.
- **Ethnicity:** Select from the available options and use the right arrow to "Choose" the option. The left arrow can be used to move items out of the "Chosen" box.
- **Total Household Income:** Indicate value from dropdown
- **Household Size:** Indicate the number of people in the client's household
- **Childhood Language:** Indicate the language the client first learned and still understand from the options listed or use the free text field if needed.
- **Official Language:** Indicate which of the Canadian official languages the client is most comfortable speaking
- 3. Select "**Save**" to save the information on the client record.





Further Context

- Users can edit the Sociodemographic record by selecting the drop down and "Edit". Users cannot delete a Sociodemographic record from the Client Profile.

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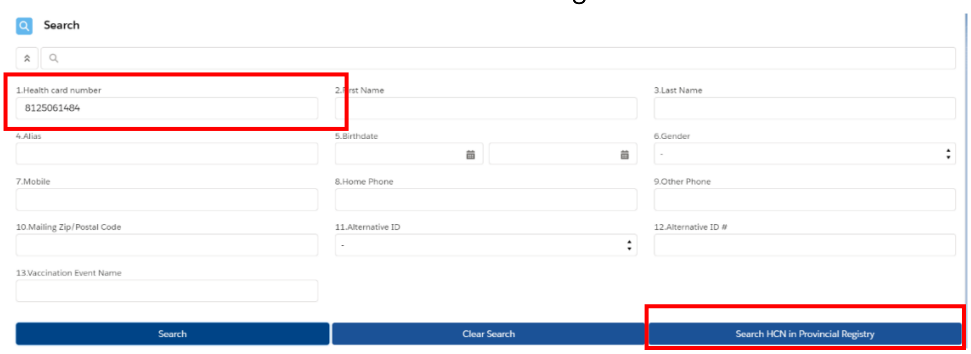
4. Creating a New Client Profile in COVaxON

Description:

If the client cannot be found from the Vaccination Event or Client Search tabs, this indicates that their profile does not exist within COVaxON and must be created. Please refer to the established clinical processes for approving new clients before creating them. When creating a new client profile, it is important to capture as much information as possible and ensure accuracy. Refer to the **Client Record – Required and Encouraged Fields** section at the top of this document for information about specific fields

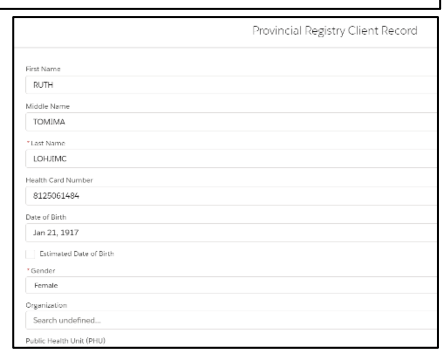
There is an integration between COVaxON and the Registered Person Database (contains information of residents registered under OHIP). It is recommended to attempt to pull client information from that database into COVaxON before attempting to create the client manually. The data extracted from the database can include name, date of birth, gender, address. **If the client does not have a HCN, proceed to Manual Client Creation below.**

1. From the Client Search tab, enter the client's health card number in the designated field and click "**Search**".
2. The "Search HCN in Provincial Registry" button will become available for selection (this button is normally greyed-out and will become available after searching for an HCN where no results are returned)



3. A window will appear, and the searched health card number will be auto populated. Click "**Next**"

4. A client record will appear with the details from the Registered Person Database.



5. Review the client details and add any additional details to be populated on the client record.
6. Select "**Next**", then "**Finish**". The client will then be added into COVaxON and can be found by searching from the "Client Search" tab and be checked in. On the client's profile, the "RPDB Number" (external ID of the client within the database) field will be populated for traceability. Proceed to ***section 2: Client Check In.***

Note: If there is no exact match for the client's HCN found in RPDB, a pop-up message will display saying "No Records Found". You may select the "Previous" button and modify the HCN if there was a mistake or proceed to manual client creation, below:

Manual Client Creation

1. From the "**Client Search**" tab, select "**New Client**" below

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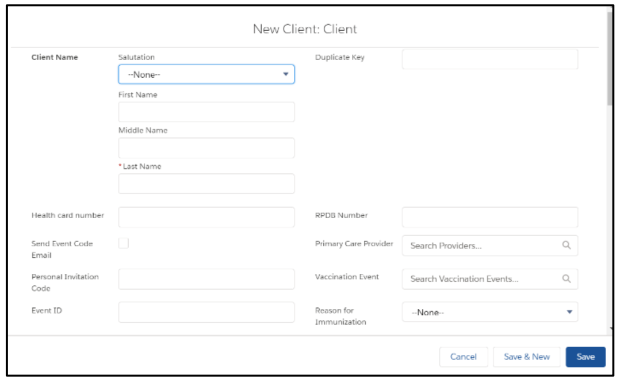
***Note**: if you are having trouble selecting the "New Client" button, type an identifier into one of the search fields, click "search" and then you can select "New Client"*

2. A new client information window will open. Proceed to fill in client information. Refer to the "Client Record – Required and Encouraged Fields" section at the top of this document for details on populating the client profile.
3. Select "**Save**". You will be brought to the client record.

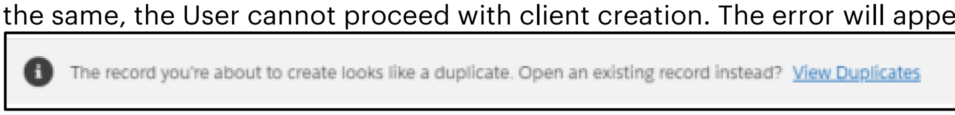
   Follow ***section 2: Client Check In***

***Note**: duplicate client entries may be detected in the system, refer to the "Further Context" below*



Further Context

- When populating the client address, Users should type the client's provided address into the search bar. Once the correct address is selected, all appropriate address fields will be populated. This ensures that client addresses within COVaxON are entered accurately and completely. (Refer to section 3 above)
- For client records that contain a health card number, a daily system integration will be run from 1am and 7am that will identify any missing fields on the client profile. The integration will populate the missing fields with information from the Registered Person Database (RPDB). For example, if there was a client in the system that did not have their address populated in COVaxON, during the daily integration that information would be copied over onto the client's profile. Please note that the integration will not override any existing information.
- There is logic in the COVaxON system to determine if a duplicate client record is being created. When a duplicate is detected a warning message will pop up, however Site Staff and Vaccinators can bypass this error and continue with client creation, as long as the Health Card Number is not the same. If the HCN is the same, the User cannot proceed with client creation. The error will appear as follows:

  After receiving this error, users can click "**View Duplicates**" to see the other client profiles 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 profile (note: opening the client's profile will exit the new client window without saving the details that have been entered. To prevent this, users can right click the client's profile they would like to open and select "Open link in new tab"). Once the user exits the "View Duplicates" window, if the User still wishes to continue with client creation, they can enter the client details and select the "Save" button on the "New Client" window and the client will be created in the system.
- If users detect a duplicate but the system does not, there is another method to merge client records, involving a duplicate key. Please see the ***Edit Dose Admin & Merge Duplicate Clients*** job aid for more details.
- A duplicate client will be detected in the system if **there is an exact match on the health card number**, or a **combination of other demographics**:
  - Name match on 2 or more of First Name (exact or fuzzy), and Last Name (exact or fuzzy), and **ONE OF:** Date of Birth (exact match), Postal Code (exact match), OR Phone number (home, work, mobile, other) (exact match). T*he phone number **and the phone type** must match (will not cross references 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". Although, fuzzy matches for French names will not be detected.

At end of shift, log out of COVaxON and clear the browser cache. Refer to the Login, Logout, User Settings job aid for detailed steps. Sanitize shared devices in accordance with location protocols.