

Your Profile: COVax Vaccinator, Site Staff, Site Super Users

Document any changes to Dose Administration (DA) records and manage duplicate clients in COVaxON.

Editing Dose Admin Records & Managing Duplicate Client Activities

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

#	Section	Description
1	Edit a Dose Administration Record	Edit details on a client’s dose administration record
2	Change the Status of a Dose Administration Record	Edit the status of a client’s dose administration record if it was entered in error, invalid, invalid SCT and CAR-T or associated with a recalled inventory
3	Merge Duplicate Client Records	Merge duplicate client records found in the system
4	Reconcile Partial Address Information on the Client Record	Compare and reconcile client information listed in COVaxON and the provincial registry
5	Mark Clients as Inactive	Mark client records as inactive if their record will no longer be used in COVaxON

Additional Information

Refer to the “**Introduction to COVaxON and User Set-Up**” job aid to learn more about your system access. Refer to the Readiness 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 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

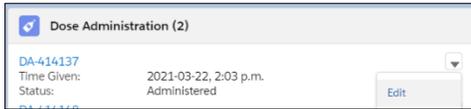
1. Edit a Dose Administration Record

Description:

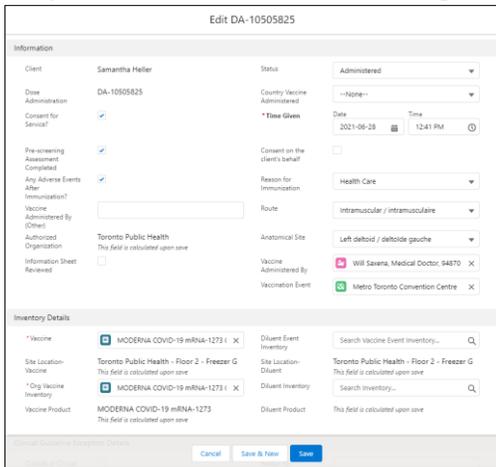
Once a dose is administered and the user clicks “**Finish**”, a Dose Administration (DA) record populates. However, if needed, **Vaccinators and Site Super Users** can edit the DA record after being recorded in COVaxON. Please note, these users can only edit DA records for clients that were tagged to Vaccination Events within their Authorized Organization.

Editing the details on a client’s dose admin record:

1. To edit the dose admin (DA) record after it has been saved in COVaxON, re-open the record by clicking “Edit” from the drop-down arrow in the Dose Administration section on the client’s record.

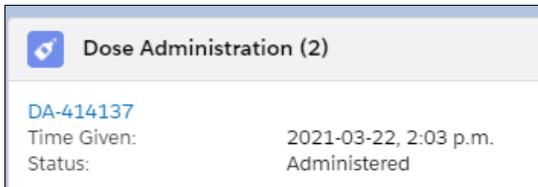


2. Update any of the fields with a pencil icon **except the “Status”** field. Edits to the DA record “Status” field must follow the process outlined in Section 2: “Change the Status of a Dose Administration Record” below.

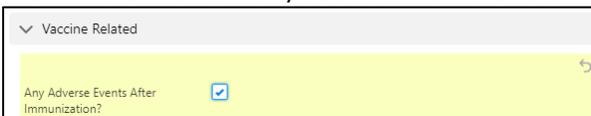


Note:

- The date and time of the dose received can be edited but cannot be removed. Once completed, click “Save” to re-save the record.

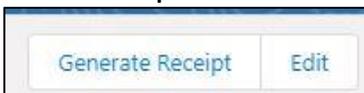


- The AEFI checkbox can only be edited from the Dose Administration record, not the client record.



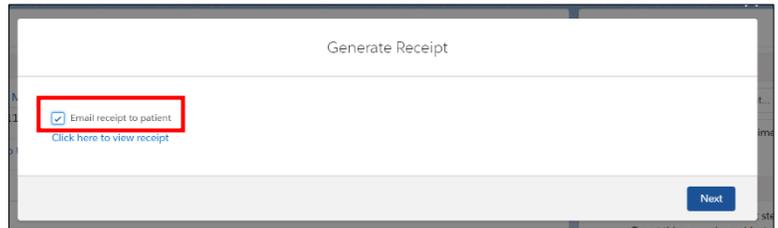
3. If needed, re-print the client’s receipt based on the edits made to their dose record. **To re-print the edited receipt:**

1. Open the client’s revised DA record by selecting the record ID (i.e. DA-414137) from the client’s record. Right click on DA hyperlink to open the record in new browser window to avoid losing your spot on the client’s record.
2. This will open the DA record and you will see a “Generate Receipt” button on the top right corner. Select “Generate Receipt”.



3. A pop-up window will open. If the client’s record has an email address populated, there will also be an option to email the new receipt to the client. If there is no email populated, but the client would like their receipt emailed, users must edit the “Contact Information” section of the client record to add an email address. Otherwise, click “Next.”

4. Click **“Finish”** to generate a new receipt. The new receipt will populate under the **“Files”** section on the client’s record (where the previous receipts are located). *For guidance on physically printing the receipt, refer to the Check Out job aid.*



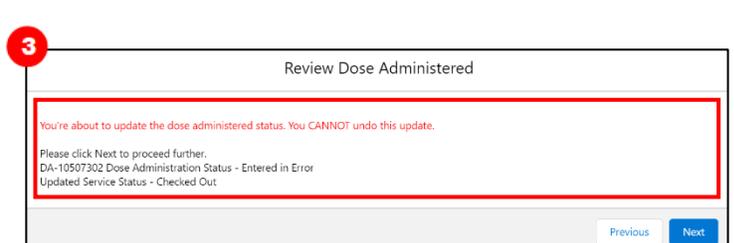
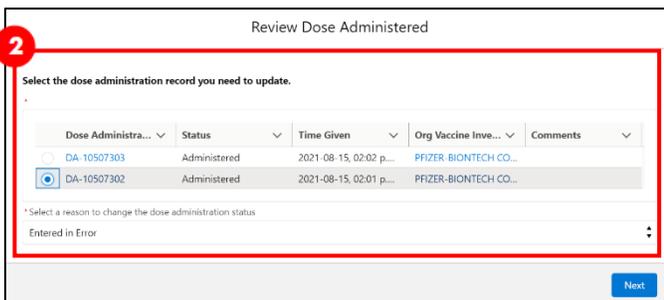
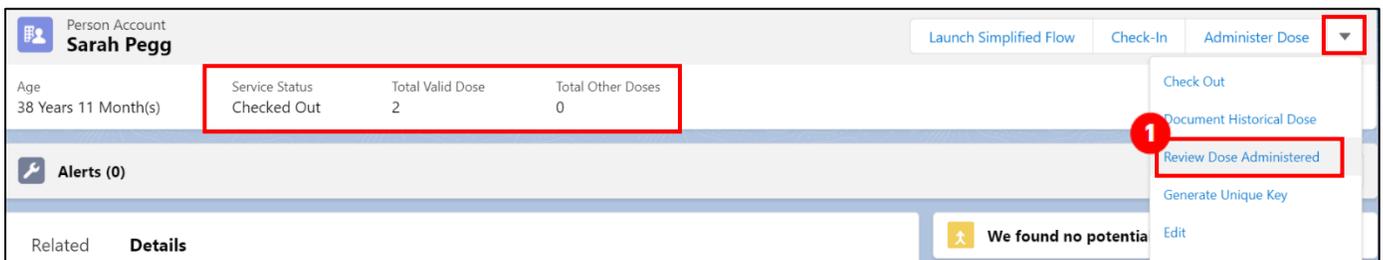
2. Change the Status of a Dose Administration Record

Description:

The Dose Administration (DA) record status may be changed by Site **Super Users** from **“Administered”** to **“Invalid”**, **“Inventory Recalled”** or **“Entered in Error”** based on 3 scenarios outlined in the chart below.

How:

1. Select **“Review Dose Administered”** from the arrow drop down on the top right corner of the client record
2. Select the DA record that requires a status update and select the status that the record should be changed to (refer to the table below summarizing how each status should be used)
3. The details of the changes will populate in the **“Review Dose Administered”** screen. Review and click **“Next”** and a confirmation screen will open. Click **“Next”**.
4. The client’s **“Total Valid Dose”** count will decrease based on the administered dose status that was changed. The **“Total Valid Dose”** field indicates the number of dose administration (DA) records that have been recorded for valid doses (with the DA record status of **“Administered”**). In addition, the **“Total Other Doses”** field will indicate the number of DA records that have been recorded for invalid doses (with the DA record statuses of **“Entered in Error”**, **“Inventory Recalled”** or **“Invalid”**). If the client’s Total Valid Dose being reduced to 0, the Client Status will be **“New”**. If the client’s Total Valid Dose being reduced to 1 or more, the Client Status will remain as **“Checked Out”**.



COVaxON Edit Dose Admin Records & Merge Duplicate Clients Job Aid

Person Account
Sarah Pegg

Age: 38 Years 11 Month(s)

Service Status Checked Out	Total Valid Dose 1	Total Other Doses 1
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Alerts (0)

Launch Simplified Flow | Check-In | Administer Dose

New | Change Owner

Dose Status Options:

Dose Status	Scenario for the Status Change	Result
Invalid	<p>If there is a clinical issue related to the dose administration record, the status of that record should be changed to "Invalid". For example:</p> <ul style="list-style-type: none"> The client received dose 2 too soon The client received another vaccine type too close to the COVID-19 vaccine (proximity of days). <p>The client will need to return to be vaccinated again. Refer to the product monograph, MOHs clinical guidance documents, NACI guidelines for additional details regarding next steps for client re-immunization.</p>	<ul style="list-style-type: none"> Does not adjust inventory Client Service Status changes back to "New" if client's Total Valid Doses is reduced to 0 Client Service Status stays as to "Checked Out" if the client's Total Valid Dose being reduced to 1 or more
Invalid SCT and CAR-T	<p>If there is a client who has received SCT or CAR-T the previous doses received should be reviewed and updated to Invalid SCT and CAR-T. For additional details please refer the Ministry of Health's clinical guidance documents.</p>	
Inventory Recalled	<p>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, MOHs clinical guidance documents, NACI guidelines for additional details regarding next steps for client re-immunization. The "Detailed Dose Client & Dose Admin" report available to Site Super Users can be used to identify clients administered with the recalled inventory.</p>	
Entered in Error	<p>If a dose administration 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"> 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. The client record already existed, but a duplicate client record was created with a new dose administration record. Vaccinators 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"> On the wrong client: Check out the client, then follow the process to change the status of that client to "Entered in Error". Then check them in and follow the proper dose administration flow when that client actually receives their dose. On the correct client: Search and find the correct client using identifiers such as HCN, date of birth, etc. Enter the dose administration for that client. 	<ul style="list-style-type: none"> 1 dose gets added back to the Doses Available Inventory Client status changes back to "New" if client's Total Valid Doses is reduced to 0 Client status changes back to "Checked Out" if the client's Total Valid Dose being reduced to 1

Further Context

- There is another status available **"Wasted"**. *This status should not be used.*

- Before conducting an adjustment to a DA record, the client must be in the “**Checked Out**” Service Status. It is not recommended to make any changes to dose administration records while the client is in the middle of the dose administration process.
- Only a site super user can update the status of a DA record.

3. 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.

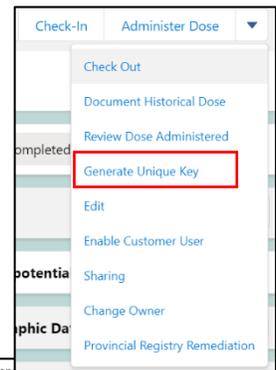
Note: Including a health card number for a client (if available) on their record is the best defense against creating duplicate clients.

1 *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

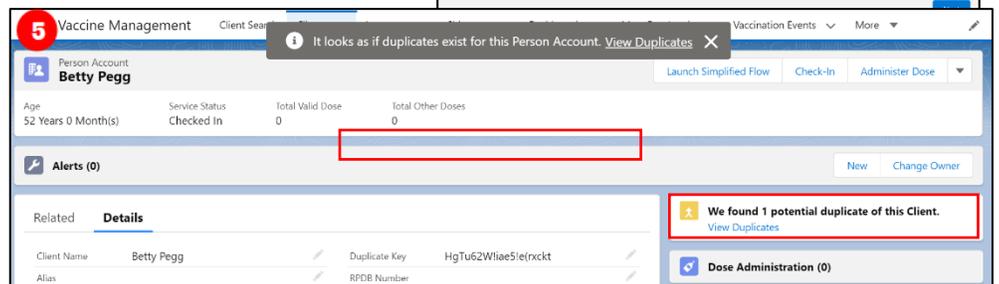
If a duplicate is not detected in COVaxON **AND** it is confirmed that the 2 client records are in fact duplicates, there is an alternative method to recognizing them as duplicates in COVaxON:

1. From one of the client records that is identified as a duplicate, select “**Generate Unique Key**” from the dropdown arrow.
2. A “**Generate Unique Key**” window will appear. Select “**Next**” and then “**Finish**”
3. This will add a “**Duplicate Key**” field to the client’s record. Copy the duplicate key by highlighting it and right clicking and selecting “**Copy**”.
4. The User should then locate the 2nd client record that has been identified as a duplicate.
5. Paste the duplicate key from the 1st client’s record, into the duplicate key field on the 2nd client’s record. This will create a link between the 2 records in COVaxON and the “**View Duplicates**” option will appear.



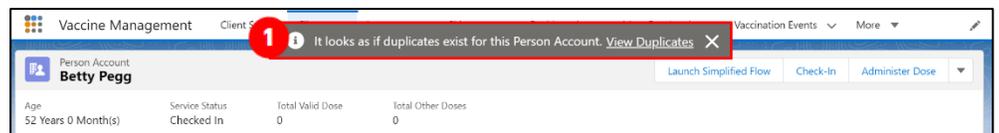
Select “**View Duplicates**” and the duplicate client records will appear in a new window.

6. Right click on the client’s name hyperlink and select “**Open Link in New Window**” for both clients.
7. Review the details on both client records to ensure that these two clients are in fact the same client. Validate details such as name, date of birth, address, etc.
8. The COVaxON system now recognizes the 2 client records as duplicates. Proceed to section B below.



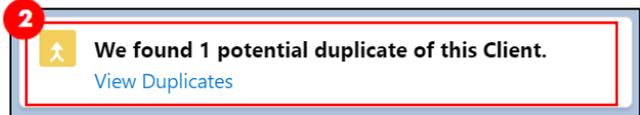
B. COVaxON Recognizes Duplicate Records

1. From the duplicate client record, a warning message will appear on the top of the record

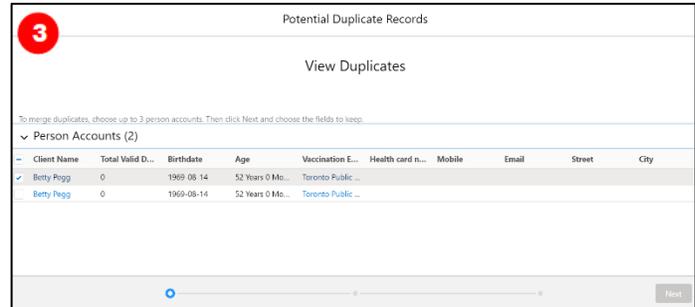


indicating that a duplicate exists.

- It will also 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 window.



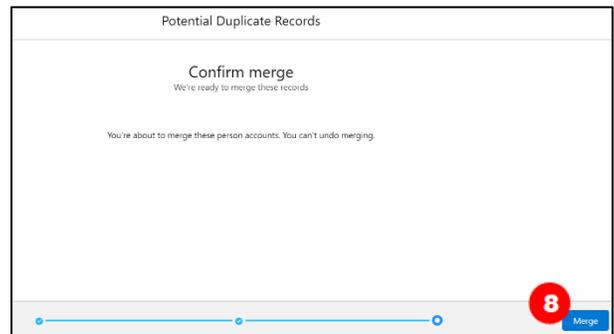
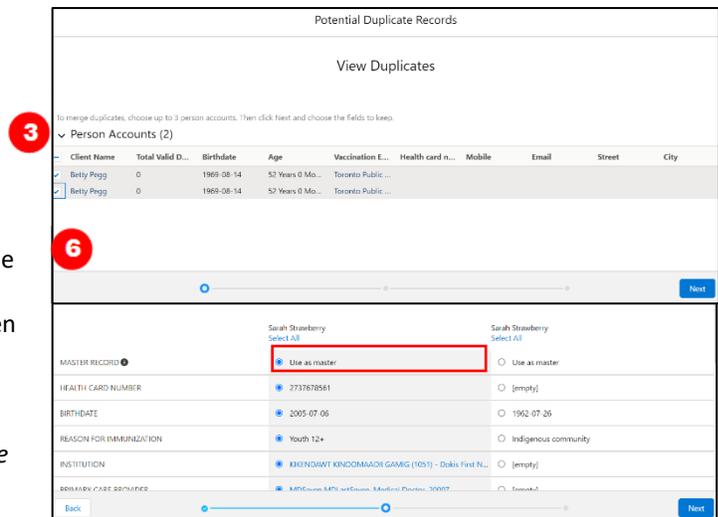
Modify Dose Administration Records: After reviewing and confirming the 2 records are in fact the same client, first check the Dose Administration records on each record to determine if they are valid as any dose administration records from the non-surviving record will be saved to the surviving record. 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 the steps in Section 2 for details on changing dose admin status to **“Invalid”** or **“Entered in Error”**.



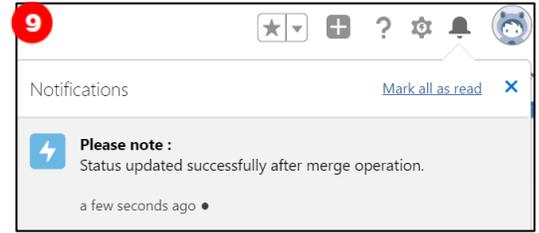
C. Once COVaxON recognizes that the client records are duplicates, a client record merge can be performed.

How:

- 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** client records
- Click **“Next”**
- Select the record to indicate which record should be considered the **“Master”**. The master record will become the surviving records client name.
- Select the fields that should be saved on the master between the two records (i.e., 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.*



7. Once all correct values have been selected, click **“Next”**.
8. Then select **“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.
9. 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.



Note: Clients can only have one active Sociodemographic record on their client record. If attempting to merge 2 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”**. Refer to the Check In job aid for more details on editing client Sociodemographic records. Once the status is updated, a client merge can be attempted again and will be successful.



D. Considerations for Merging Certain Fields:

- 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 Valid 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 Valid Dose field will display **“2”**.



The Service Status of the surviving record will be populated based on the below:

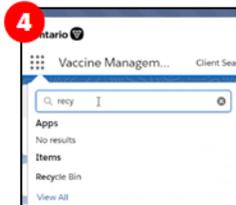
- **Doses Administered:**
 - 0 **“Administered”** Dose Administration records resulting from merge: the surviving client record status becomes **“New”** after merge
 - 1 or more **“Administered”** Dose Administration record resulting from merge: the surviving client record status becomes **“Checked Out”** after merge
- **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 AND the surviving client record is in Service Status **“Checked Out”**
- 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

Date	Field	User	Original Value	New Value
2021-08-15, 4:50 p.m.	Client Status	Ellen Hall	New	Dose 1 checked out
2021-08-15, 4:50 p.m.	Duplicate Key	Ellen Hall	HgTu62Wlae5e1xctt	
2021-08-15, 4:50 p.m.	Stage	Ellen Hall	New	In Progress
2021-08-15, 4:50 p.m.	Client Merged	Ellen Hall	Betty Pegg	
2021-08-15, 4:24 p.m.	Duplicate Key	Ellen Hall	@aQMOE2YOw/Wtrn8...	HgTu62Wlae5e1xctt
2021-08-15, 4:22 p.m.	Duplicate Key	Ellen Hall	@aQMOE2YOw/Wtrn8...	@aQMOE2YOw/Wtrn8...

The history of the fields of the non-surviving record can also be viewed from the Person Account History:

1. From the new client, in the Person Account History section in the “Related” tab, select “View All”
2. From the Person Account History, users can see the original value and the new value
3. 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.
4. **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.



Record Name	Type	Deleted By	Deleted Date
<input type="checkbox"/> test clienttest	Client	Frank Li	2021-02-12, 9:52 AM
<input type="checkbox"/> DRI-000000017	Duplicate Record Item	Frank Li	2021-02-12, 9:52 AM
<input type="checkbox"/> Chris Brown	Client	Frank Li	2021-02-11, 11:56 AM
<input type="checkbox"/> ONFrankie BaseClient3 sonny	Client	Frank Li	2021-01-29, 8:30 PM

5. 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.

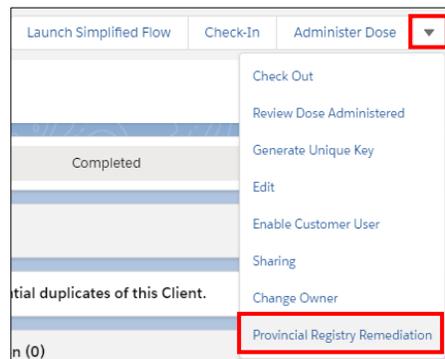
4. Reconcile Partial Address Information on the Client Record

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).

How:

1. Go to the desired client’s record and click on the dropdown arrow and select a “Provincial Registry Remediation”



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- 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.
- Click **“Next”** and then **“Finish”**

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

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	M5V 0L7	N0B 2T0	<input type="text" value="M5V 0L7"/>

Next

5. Mark Clients 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.

How:

- Go to the desired client’s record
- Click on the pencil icon next to any field on the client record to update
- Click on the checkbox next to **“Inactive”**
- Select an **“Inactive Reason”** from the drop-down. Options include: **“Deceased”** or **“Moved Out of Province”**
- 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.
- Click **“Save”** on the client record

2 Person Account
Sheldon Brown

Birthdate: 1995-06-08 | Public Health Unit (PHU): [edit]

Estimated DoB: | Inactive:

3 Inactive:

4 Inactive Reason: Deceased

5 Date of Death: 2021-09-02

Indigenous: --None--

6 Save

Further Context

- A daily data remediation occurs to ensure that deceased client records are properly recorded in COVaxON. During the remediation, clients who are marked as deceased in the Provincial Registry are marked as deceased in COVaxON. If clients in COVaxON already have any of the following fields populated on their record: **“Inactive”** checkbox, **“Inactive Reason”** or **“Date of Death,”** this data will not be overwritten by the information in the Provincial Registry. For example, if a client is marked as Inactive with the reason **“Moved Out of Province,”** their information will not be updated in COVaxON through this remediation process.

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- Once a client is tagged to the “**Inactive Reason**” of “**Deceased**”, COVaxON communications will not be sent to the client
- Do not populate the “**Date of Death**” unless the “**Inactive**” box is checked, and the “**Inactive Reason**” is “**Deceased**”.
- When a client is marked as “**Inactive**” users will no longer be able to administer doses to that client. If the client has been incorrectly marked as “**Inactive**”, users can go to the client record and uncheck the box.

At end of shift, log out of COVaxON and clear the browser cache. Refer to the “Introduction to COVaxON and User Set-Up” job aid for detailed steps. Sanitize shared devices in accordance with location protocols.