

# COVAXON USER MANUAL

For use by Healthcare Providers within the York Region Authorized Organization

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This manual was created by the IDCD Systems at York Region Public Health. For any updates or questions pertaining to the content in this manual, please email [IDCDsystems@york.ca](mailto:IDCDsystems@york.ca)

IDCD Systems Team  
[idcdsystems@york.ca](mailto:idcdsystems@york.ca)  
1-877-464-9675  
TTY 1-866-512-6228  
york.ca



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## What is COVaxON?

COVaxON is an immunization and inventory repository for COVID-19 vaccinations. The repository is used for documenting and maintaining historical immunization records for COVID-19 vaccinations and for COVID-19 doses given at point of care. The repository is also used for COVID-19 vaccine inventory tracking, as well as allocation of vaccine to specific Vaccination Events.

## Training Recordings

Prior to working in the COVaxON production site, watch the following training videos to become more comfortable with navigating and using the system:

TOPIC	WHERE POSTED	LINK
COVaxON - System Overview	YouTube	<a href="https://youtu.be/BWtXWdwdZyg">https://youtu.be/BWtXWdwdZyg</a>
COVaxON - System Training for Vaccinators	YouTube	<a href="https://youtu.be/PzpvoB5iWzc">https://youtu.be/PzpvoB5iWzc</a>

## Gaining Access to the COVaxON System

Access to COVaxON under the York Region Authorized Organization is managed by the IDCD Systems team at York Region Public Health. To enroll in COVaxON, please contact [idcdsystems@york.ca](mailto:idcdsystems@york.ca) for details and support.

Users can only log into the COVaxON application from within Canada. In addition, some users with VPN connections routed through another country will also be unable to access the application.

## Setting up your COVaxON Account

Once you enroll in the COVaxON system for an account within York Region, you will need to set up your account:

- Salesforce will send you an email with a link to set your password. Follow the directions in the email to begin setup of your account.
- **The link is only active for 24 hours.** If your link expires, please contact the provincial help desk at **1-888-333-0640**.
- If you did not receive a link or need assistance, contact IDCD Systems at [idcdsystems@york.ca](mailto:idcdsystems@york.ca)

Login requirements include:

- Username
- Password
- Two-Factor Authentication (2FA)

Two-Factor Authentication (2FA) is a security feature that adds a second layer of security to the user authentication process.

The minimum device requirements for Salesforce 2FA Compatibility are:

- iOS 8.0 or above; iPhone and iPad – download via App Store
- Android 7.0 (Nougat) or above – download via Google Play

If you are a new COVaxON user and need to set up your account, click the link here: [Initial Set-up of your COVaxON Production Account](#)

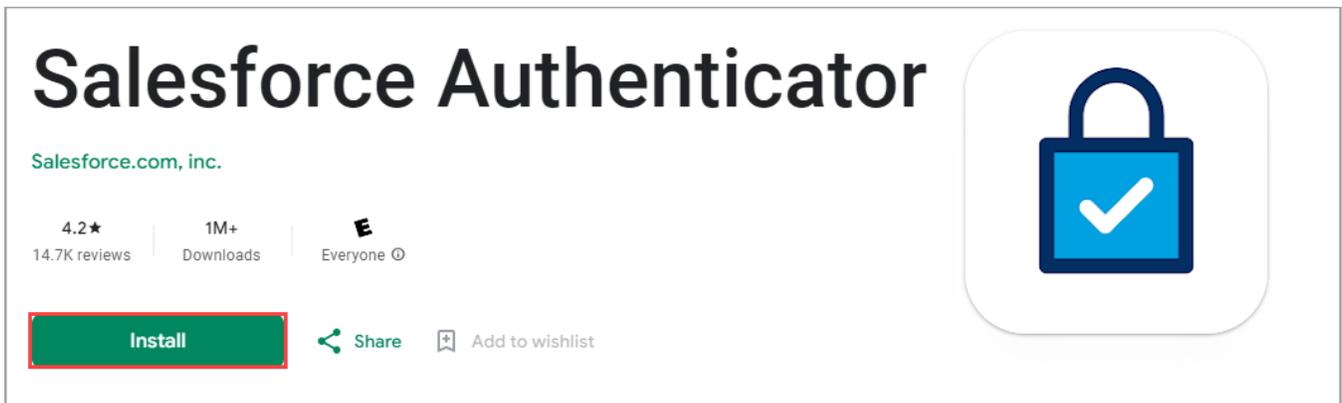
If you are an existing COVaxON user and need to add your existing COVaxON account to a new mobile device, click the link here: [Adding an Existing Account to a new Mobile Device](#)

## INITIAL SET-UP OF YOUR COVAXON PRODUCTION ACCOUNT

Use these instructions for the initial set-up of your COVaxON Production (live) account.

### Step 1: Salesforce Authenticator App

1. **Install** the **Salesforce Authenticator app** through Google Play or the Apple App Store on your mobile device. The application is free. The icon for the Salesforce Authenticator can be seen in the image below:



### Step 2: Set Password and Two-Factor Authentication

1. **Navigate** to the email from Salesforce for your COVaxON production account details. **Click** on the link in the email to finish setting up your password.

- Use **Google Chrome** to open the link. You may need to copy and paste the link to a Google Chrome browser. Do not use Microsoft Edge or Internet Explorer for setting up your account or for logging into COVaxON.
- **The link is valid for 24 hours only.** If you did not receive a link or if the link expires, contact provincial help desk at **1-888-333-0640**.

Finish resetting your Salesforce password

QA\_SUPPORT@salesforce.com  
To [redacted]

Retention Policy 36 Month Delete - Default (3 years) Expires 1/10/2027 Thu 1/11/2024 12:21 PM

Salesforce recently received a request to reset the password for the username [redacted] To finish resetting your password, go to the following link. This link expires in 24 hours.

[https://covaxon.my.salesforce.com/secure/forgotpassword.jsp?r=00D4t0000008aeP0054t000000UI2IcJwKMwoPMDDBENHQwMDAwMDA4YVWVQeEg8wMkcOdDAwMDAwMDBaR0waDzAwNTRMDAwMDAwVWwySRidzavMzzESEMld8VRGs2rM7qXDSevWoeEaDExWPwyqzsWhFE6txil59\\_KRQCdEVe6egwNNMUMFrOUTQxF7ghMTz2Y21r5fBvAlwMDOyrluCAW9U2CWIFT6pYMjaTaqTWF&display=page&fpot=0dd236a8-3847-432c-871d-2f56e2957e31a03d9ef7-f3e0-49ed-9d05-31a24fbcbe](https://covaxon.my.salesforce.com/secure/forgotpassword.jsp?r=00D4t0000008aeP0054t000000UI2IcJwKMwoPMDDBENHQwMDAwMDA4YVWVQeEg8wMkcOdDAwMDAwMDBaR0waDzAwNTRMDAwMDAwVWwySRidzavMzzESEMld8VRGs2rM7qXDSevWoeEaDExWPwyqzsWhFE6txil59_KRQCdEVe6egwNNMUMFrOUTQxF7ghMTz2Y21r5fBvAlwMDOyrluCAW9U2CWIFT6pYMjaTaqTWF&display=page&fpot=0dd236a8-3847-432c-871d-2f56e2957e31a03d9ef7-f3e0-49ed-9d05-31a24fbcbe)

If you didn't ask for your password to be reset, contact your Salesforce administrator.

Click hyperlink to open in Chrome browser **1**

 **Note:** Your email may state that you need to 'reset your password,' even though this is the initial setup of the program. Click the link in the email to continue setting up your COVaxON account.

2. A pop-up will appear, and you will be prompted to **Change Your Password**.

- Enter a **New Password** with at least eight characters, including at least one letter and at least one number.
- Re-enter the same password in the **Confirm New Password field**.
- Select a Security Question and provide the answer. Make note of this in a secure place, as you will require the answer to this security question should you ever have to reset your account.
- Click **Change Password**.

**Change My Password**

New Password

..... **a**

Confirm New Password

..... **b**

Security Question

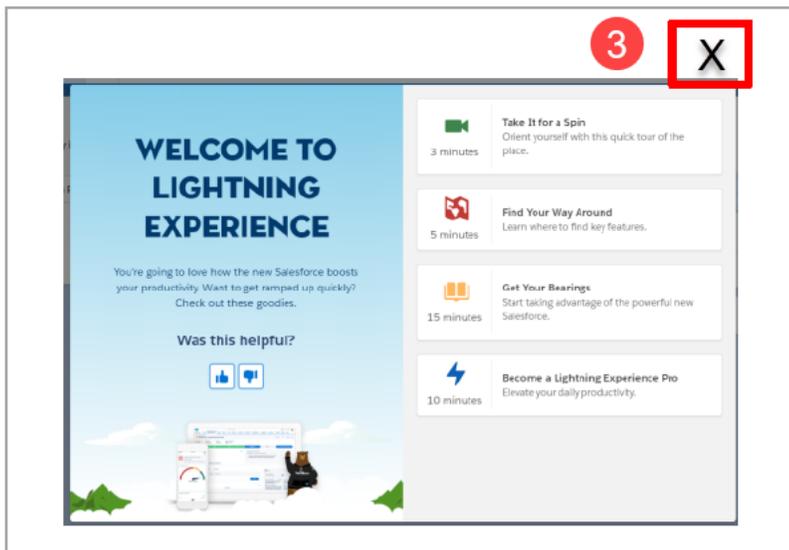
▼ In what city did you meet your spouse/significant other?

Answer

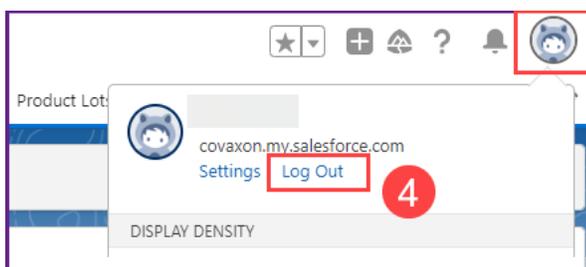
City Name

**Save** **d**

3. COVaxON will open to the home page. A pop-up window may appear stating **Welcome to the Lightning Experience**. Click the 'X' in the upper right hand of the screen to exit out of the welcome message.

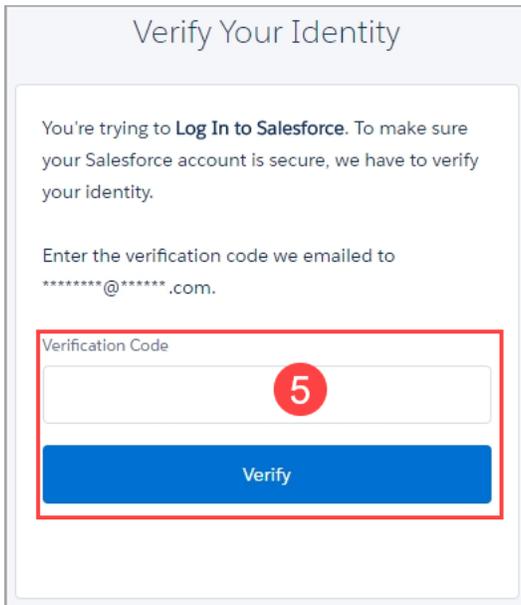


4. Log out of COVaxON to continue to set up the Two-Factor Authentication (2FA). On the top right corner of the page, click the drop down arrow beside your name and click **Log Out**.



5. Your password has now been set. You will now need to set up your Two-Factor Authentication using your mobile device in order to access the COVaxON system:

- a. Navigate to <https://covaxon.my.salesforce.com/> in Google Chrome (do not use other web browsers).
- b. Enter your Username and Password and click **Log In**.
- c. Salesforce will send a verification code to your registered email address.
- d. Enter the verification code sent in the email and click **Verify**.



Verify Your Identity

You're trying to **Log In to Salesforce**. To make sure your Salesforce account is secure, we have to verify your identity.

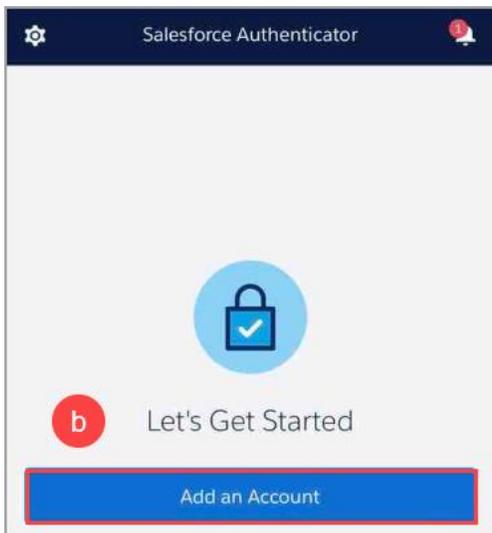
Enter the verification code we emailed to \*\*\*\*\*@\*\*\*\*\*.com.

Verification Code

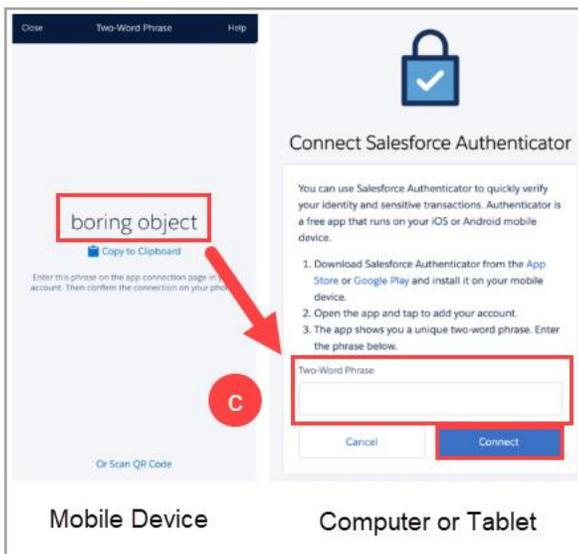
5

Verify

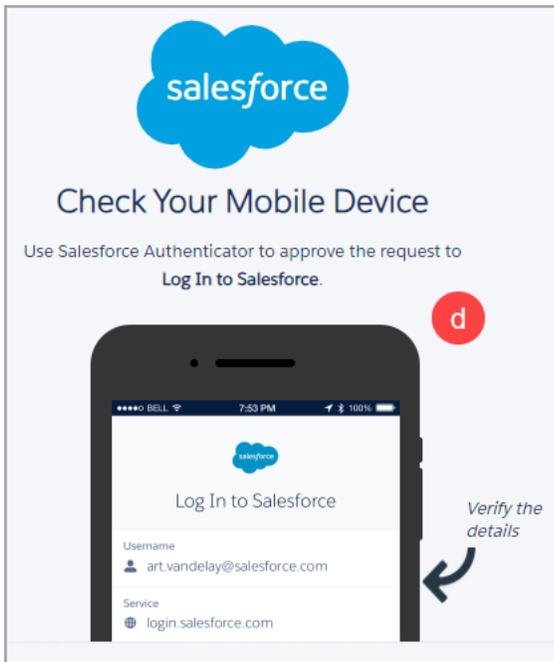
6. You will then be asked to enter a two word phrase that will be provided through the Salesforce Authenticator application on your mobile device. Open the Salesforce Authenticator application on your mobile device.
  - a) Click **Skip Tour** if prompted
  - b) Click **Add an Account**.



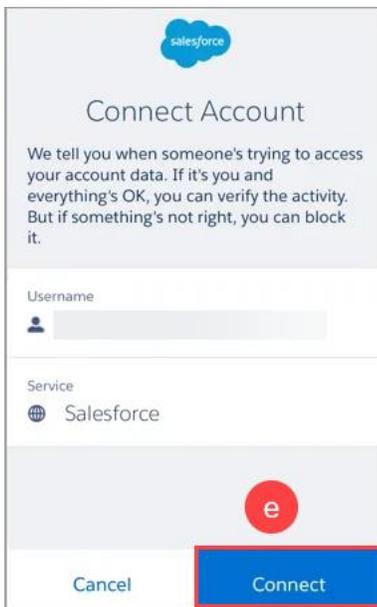
c) The Authenticator on your mobile device will display a two word phrase. Enter this two word phrase in your computer's Google Chrome browser and click **Connect**.



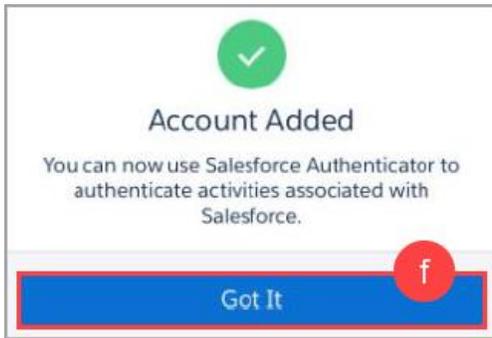
d) If the two word phrase you entered is correct, you will be prompted by your Google Chrome browser to access the Salesforce Authenticator Application on your mobile device once more to confirm the connection between the two devices. You will have 90 seconds to complete this step.



e) Check your mobile device and click **Connect** to verify your account.



f) A pop up window will appear confirming that your account has been added. Click **Got It** to complete the setup process.



Your COVaxON account and Two-Factor Authentication setup is now complete.

### Notes:

- If you are prompted for location services in the app, you can choose whether you accept or decline.
- Benefit to having location services enabled: You will be not prompted every time to enter the two-word phrase if you are in the same location.

## ADDING AN EXISTING ACCOUNT TO A NEW MOBILE DEVICE

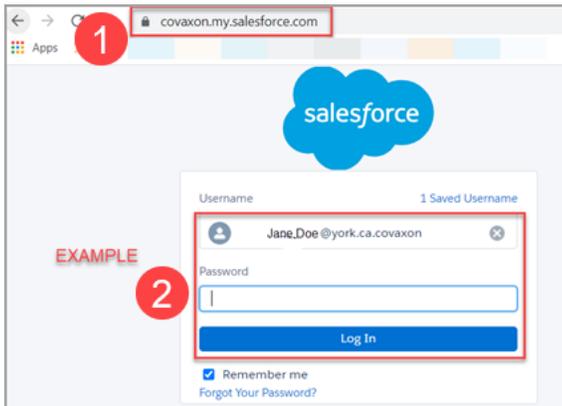
### Scenarios:

- COVaxON user receives a new mobile device and needs to add their account to the Salesforce Authenticator app on their new device.
  - COVaxON user deletes the Salesforce App from their device and is trying to re-add it.
1. Download the Salesforce Authenticator app on to your mobile device that you will be using (e.g., new phone) to login to COVaxON. Refer to [Step 1: Download Salesforce Authenticator App](#) for guidance, if needed. **Ensure download the Authenticator app prior to calling the service desk.**
  2. Contact the COVaxON Support Desk at **1-888-333-0640**. The help desk will disable your account from the Salesforce Authenticator app from your old device and assist you in adding your account to the Salesforce authenticator app on your new device.

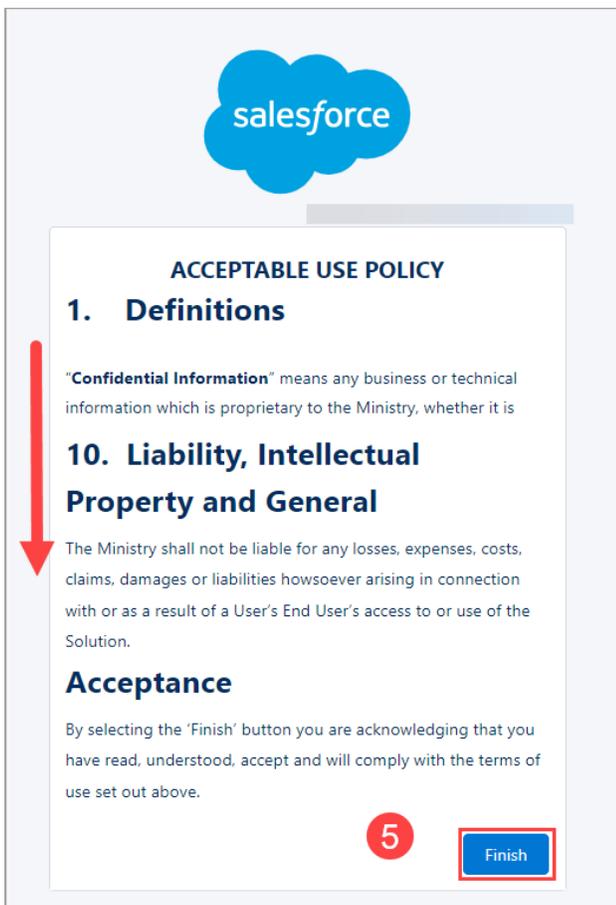
## Logging in to the COVaxON Production Site

Users should log in to their COVaxON accounts at least once per month to ensure their accounts remain active. To log in to the COVaxON production site, follow these steps:

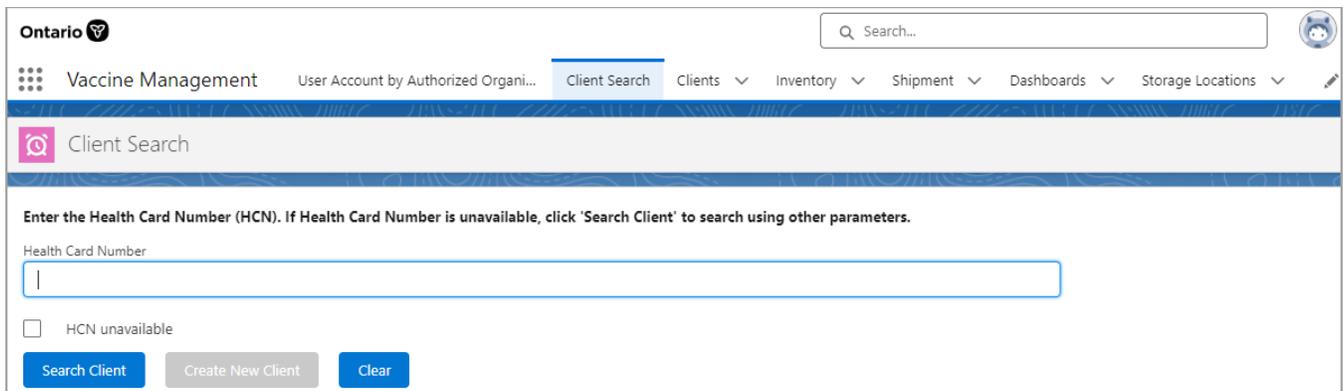
1. Open COVaxON by opening your browser (Safari, Google Chrome, or Microsoft Edge) and go to the COVaxON URL link: <https://covaxon.my.salesforce.com>
2. Enter your **Username** and **Password** credentials. Click **Log In**.



3. On your mobile device, you will receive a request from the Salesforce authenticator app.
4. Open the application and click **Approve**.
5. You will see the **Acceptable Use Policy (AUP)**. Scroll down to read the policy. Click the **Finish** button at the bottom of the AUP to agree to the terms.

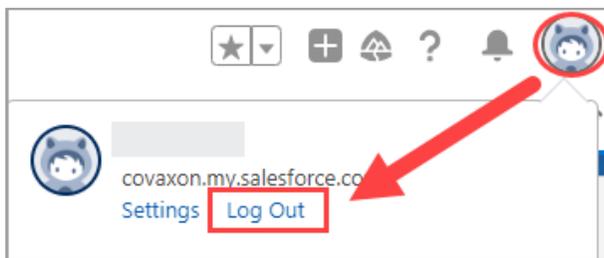


6. The COVaxON home page will open on your tablet, computer, or laptop. The home page will display **Client Search** options by default.



## Logging Out of COVaxON

1. On your tablet, computer, or laptop, click on the Salesforce avatar on the top right corner of the COVaxON home screen. Select **Log Out**.
2. Exit the browser window.



*Continue with the following steps only if using a shared device.*

3. Go to your browser settings and clear the cache (website and browsing history) for the next user.
4. Do not save the password in the Salesforce login page when using a shared device. This will prevent other users from easily logging in under the incorrect credentials.

## Authorized Organizations (AO)

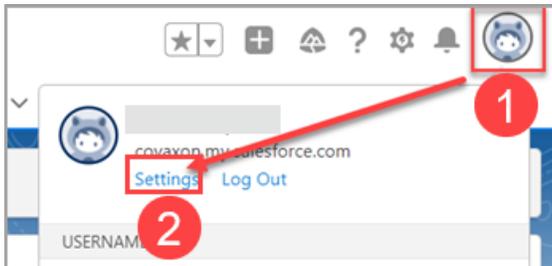
### USERS WHO WORK FOR OTHER HOSPITALS/ORGANIZATIONS

**Important:** Users **must** ensure they are logged into their York Region Authorized Organization COVaxON account. If a user is employed by multiple organizations (e.g. Hospital, Retirement Home, Long Term Care Home) they may have multiple user accounts in COVaxON. Ensure you have logged into your York Region COVaxON account, otherwise you

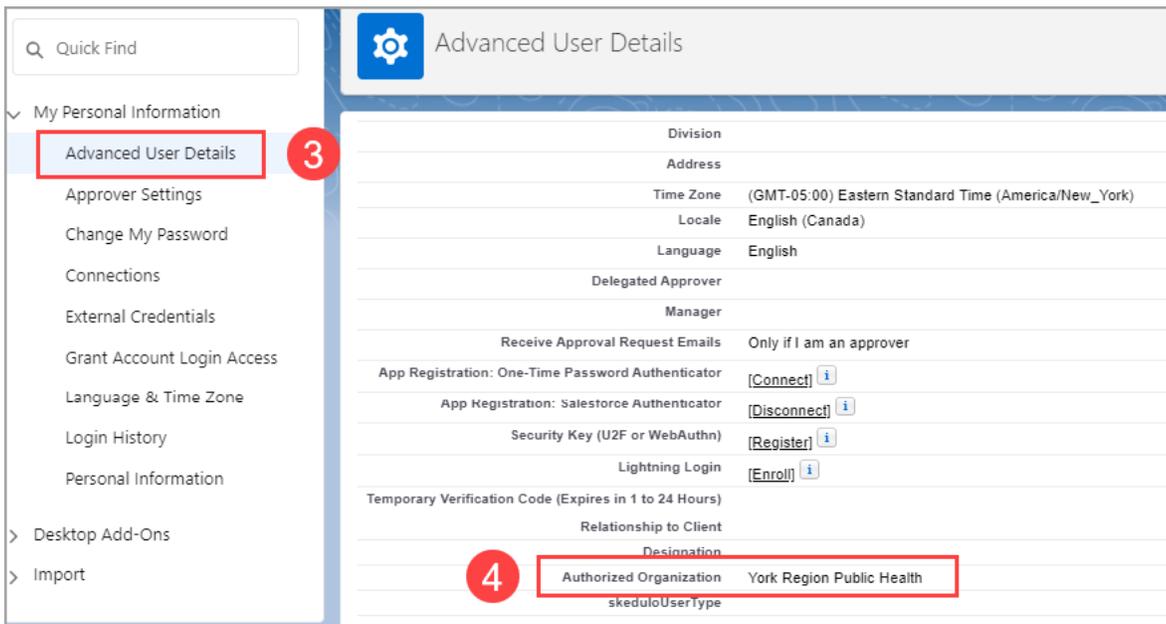
will not have access to the correct Vaccination Events and/or will use inventory from other organizations. If you have questions about this, contact [IDCDSystems@york.ca](mailto:IDCDSystems@york.ca) for support.

## CONFIRMING YOUR AUTHORIZED ORGANIZATION

1. Once you have [logged into the production site](#), click on the Salesforce avatar on the top right corner of the page.
2. Select **Settings**.



3. Navigate to **Advanced User Details**.
4. Scroll down to check your **Authorized Organization** and confirm it displays **York Region Public Health**



**Important:** If your Authorized Organization does not display **York Region Public Health**, and you are unsure of your login information for your York Region account, contact [idcdsystems@york.ca](mailto:idcdsystems@york.ca) for support.

## Password Reset Options



**Note:** COVaxON Support will be available Monday to Friday from 8:30am to 4:30pm. Weekend support is no longer available.

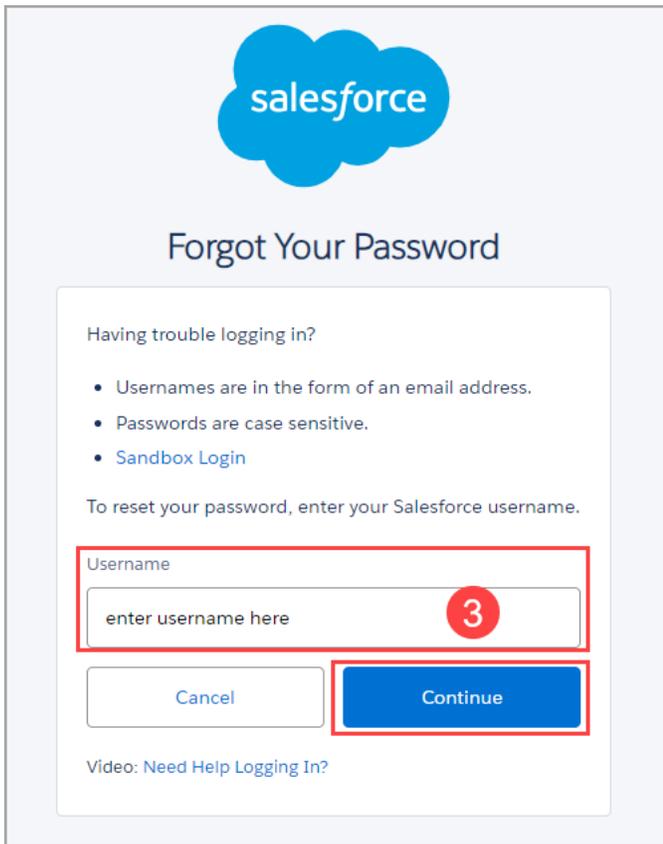
### RESETTING YOUR OWN PASSWORD

If you have forgotten your password and would like to reset it to access COVaxON, follow the instructions below:

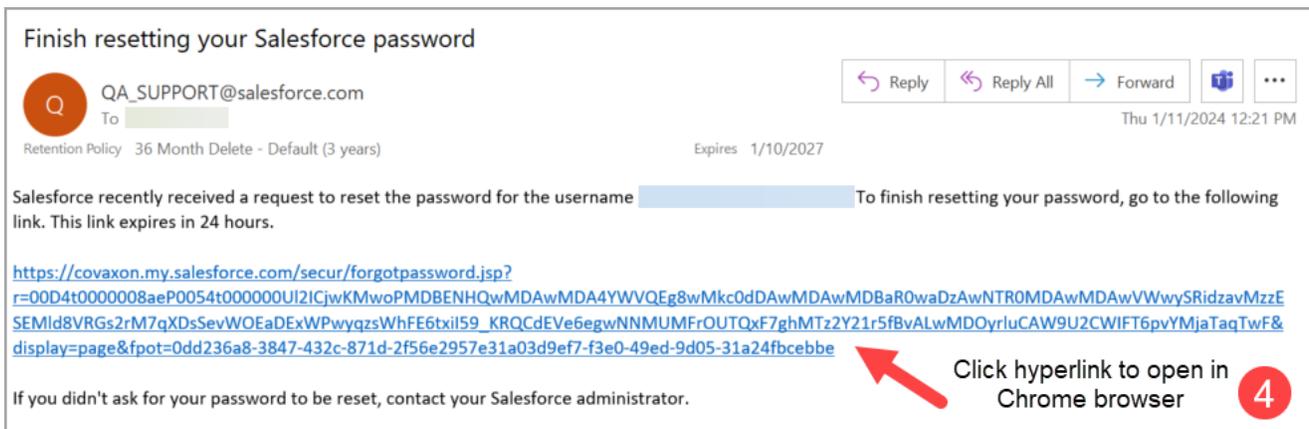
1. Navigate to <https://covaxon.my.salesforce.com>
2. Click on the **Forgot Your Password?** hyperlink

A screenshot of the Salesforce login page. At the top is the Salesforce logo. Below it are two input fields: 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Underneath the button is a 'Remember me' checkbox. At the bottom left of the form, the text 'Forgot Your Password?' is enclosed in a red rectangular box. To the right of this box is a red circle containing the number '2', indicating the second step in the process.

3. Enter your username and click **Continue**



4. Check your inbox for email notification from [QA\\_SUPPORT@salesforce.com](mailto:QA_SUPPORT@salesforce.com) to finish resetting your password. Ensure to also check your junk mail folder. Click on the link provided in the email.



5. After clicking the link in the email, your browser will open a new window and you will be asked to answer your security question. This question will be different for all users, based on their information provided on the initial setup of their account.

To verify your identity, answer the security question associated with your account.

Username

\_\_\_\_\_

Question

**In what city were you born?** 5

Answer

\_\_\_\_\_

**Continue**

If you still can't log in, try the following: Contact your company's administrator for assistance.

6. On your mobile device, open the Salesforce Authenticator and tap **Approve**.

10:25

salesforce

Log In to Salesforce

Username

\_\_\_\_\_

Service

Salesforce

Device

Chrome 96 on OSX 10.15.7

Always approve from this location

Current Location

\_\_\_\_\_ >

6

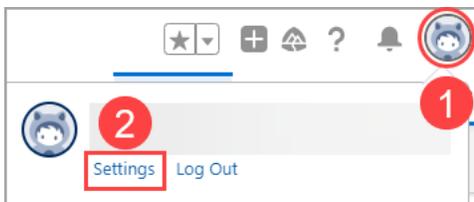
Deny Approve

7. Change your password by entering a new password and confirming the new password. Make sure to include at least eight characters, one letter and one number.
8. Click **Change Password** to save.

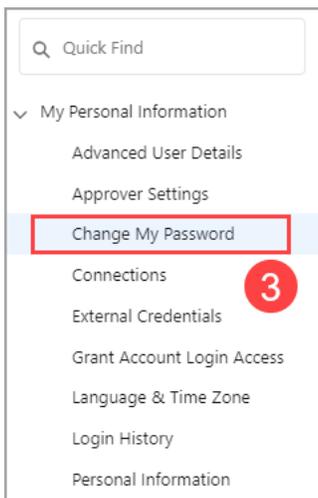
## HOW TO CHECK AND UPDATE YOUR SECURITY QUESTION

You have the option of reviewing and changing your security question while logged in to the COVaxON should you wish to. You must be logged in to COVaxON to view and change your security question:

1. Once you have logged into the production site, click on the Salesforce avatar on the top right corner of the page.
2. Select **Settings**.



3. From the left-hand navigation menu, select **Change My Password**



4. Check if the Security Question is blank.

- a) If blank, you will need to update. Proceed to step #5.
- b) If it is populated, change is not required. If you would like to update your security question, proceed to step #5.

Security Question

▼ If your security question is blank, use the drop down arrow to select a question

Answer

Input your answer and click **Save** below

4 Save

5. To update your security question, your password must also be changed.
  - a) Enter your current password
  - b) Enter a new password. Make sure to include at least eight characters, one letter and one number.
  - c) Confirm new password by entering a second time. Ensure the passwords match.
  - d) Select a security question from drop down options.
  - e) Enter the answer to your security question.
  - f) Click **Save** when complete.

Change My Password

\* Current Password

..... a

New Password

..... b

Confirm New Password

..... c

Security Question

▼ In what city did you meet your spouse/significant other? d

Answer

City Name e

Save f

Your password and security question have now been changed successfully.

## Searching for Clients

Click on a link to access the topic within this section:

- [Search for Client – With HCN](#)
- [Search for Client – Without HCN](#)

- [Alternate Search – Using the Global Search Bar](#)

## SEARCH FOR A CLIENT WITH A HEALTH CARD NUMBER (HCN)

1. Click on the **Client Search** tab.
2. Manually enter the client's HCN (must be a 10-digit number with no spaces/dashes without the 2-letter version code at the end).
3. Click the **Search Client** button to complete the search.

4. If results are produced, click the desired client's name (which is a hyperlink) and their record will open in a new tab.

Client Name	Health Card Number / COVID ID	Birthdate	Postal Code
<a href="#">Mary Poppins</a>	XXXXXX7780	1980-01-15	L4K 2M9

5. If results are not produced, click **Finish** to continue searching using other client identifiers. If no results are returned after searching by multiple search terms (e.g., Name, HCN, Date of Birth), a new client record will need to be created. To complete this task, proceed to the [Create a New Client in COVaxON](#) section.

## SEARCH FOR A CLIENT WITHOUT A HEALTH CARD NUMBER (HCN)

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

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

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

Health Card Number

HCN unavailable 2

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

**No Records Found**

Close window to create a new client. 5

## ALTERNATE SEARCH – USING THE GLOBAL SEARCH BAR

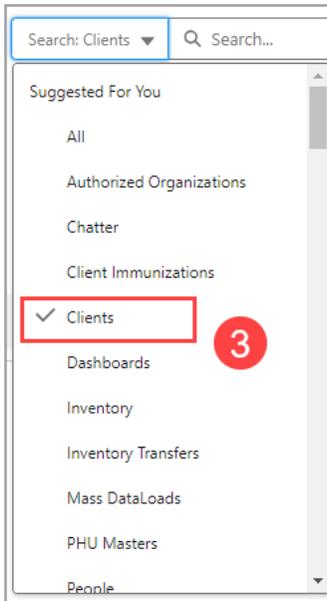
1. Click inside the **Global Search bar** which is located at the top of your browser.
2. To the left of the Global Search bar, you will see **All** with a downward arrow. Click on **All**.

Ontario  2

Vaccine Management

Search: All

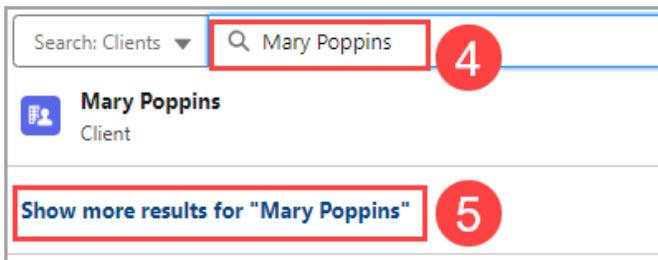
3. Select **Clients** from the dropdown options.



4. Enter your search criteria in the Search field. Examples of search options:

- Client's full name
- Client's last name and year or date of birth
- Client's HCN or COVID ID
- Client's phone number
- Client's home address
- Client's email address

5. Press **Enter** on your keyboard or click on **Show more results**



6. Review the list and select the select client if they appear.

## Creating New Clients

Clients who cannot be located in COVaxON can be created as new clients. Ensure that multiple searches are conducted prior to creating a new profile to avoid duplicate records.

## CREATE A NEW CLIENT IN COVAXON – WITH ONTARIO HEALTH CARD (HCN)

1. From the Client Search Tab, enter the client's HCN (10 digits only - no dashes, spaces or two letter version code at the end) and click **Search Client**.

Ontario

Search...

Vaccine Management Client Search Inventory Shipment Vaccination Events

Client Search

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

Health Card Number  
1234567890

HCN unavailable

Search Client Create New Client Clear

2. When the HCN is not in COVaxON, the Search Client screen will open. Search using the client's last name and at least one other search parameter available. Click **Next**.

Search Client

Search using the Last Name with the other search parameters.

First Name

\* Last Name

Birthdate

Gender  
--None--

Home Phone

Mobile

Next

3. When no results are produced, you will be directed to an option to search the Provincial Registry. This is an integration between COVaxON and the Provincial Registry (which contains information of residents registered under OHIP). Click **Next** to continue.

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

**3**

4. Provincial Registry search results will display. When an exact match is found, a record will appear with the details from the Provincial Registry. Review the client details and validate the information to ensure it is the correct client. Confirm with the client the following information is correct in the Provincial Registry and update if necessary:

- First / Middle / Last Names
- Date of Birth
- Gender
- Home Phone
- Address



**Note:** If there is no exact match for the client's HCN found in the Provincial Registry, a pop-up message will display saying "No Records Found." You may click the **Previous** button and modify the HCN if there was a mistake or click **Next** and proceed to section [Create New Client in COVaxON - Without Ontario Health Card Number \(HCN\)](#).

**No Records Found**

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

**4**

5. If you would like to proceed with client creation, select **Save**. If you do not wish to proceed with client creation, click cancel.

6. You will receive a message Client successfully created. Click **Finish**.

7. You will be returned to the Client Search tab. Enter the client's HCN if it is not pre-populated. Click **Search Client**.

Ontario Vaccine Management Client Search

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

Health Card Number: 1122334455

HCN unavailable

Search Client Create New Client Clear

- The search results will populate with the new client you created. Click on the Client's Name to open the client's profile.

Client Search Results

Client Name	Chosen Name	Health Card ...	Birthdate	Postal Code
Mary Poppins		XXXXXX9595	1991-05-04	M7A 1C1

Previous Finish

- Continue to [Updating Client Information](#) Section.

## CREATE A NEW CLIENT IN COVAXON – WITHOUT ONTARIO HEALTH CARD (HCN)

After searching for the client using the above processes, if it is determined that the client does not exist in COVaxON, their record must be created manually. When creating a new client record, it is important to capture as much information as possible to ensure accuracy.

- From the **Client Search** tab, click **Create New Client**. A new client information window will open. Proceed to fill in client information.

Vaccine Management Client Search Inventory Shipment

Client Search

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

Health Card Number

HCN unavailable

1

Search Client Create New Client Clear

**Note:** The **Create New Client** button will be unavailable until the user has attempted to search for the client using the **Search Client** button.

2. Enter **Client Name**
3. **Alias** – Enter if applicable.
4. Verified **Chosen Name** – The chosen name checkbox and chosen name fields are available to support transgender Ontarians who are in the process of changing their legal (current) name to their chosen name.
  - Verify the users ID (Driver’s License, Passport, or other government issued ID)
  - Select the check box for **Verified Chosen Name**.
    - i. If the checkbox is selected, the values entered in Chosen Name will appear on the client’s enhanced vaccine certificate from the provincial portal.
    - ii. If the checkbox is not selected, the Client’s Legal Name will appear on the client’s enhanced vaccine certificate from the provincial portal.
  - Enter the chosen name(s) into the chosen name fields – Chosen First Name, Chosen Middle Name and/or Chosen Last Name as needed
5. Enter **Health Card Number**
  - If no HCN is available, it is advised to select alternate ID from the drop down
6. **Birthdate** – 1900-01-01 is the default date when the client’s birthdate was missing/unknown at the time of uploading clients into COVaxON. Ensure to verify birthdates for all clients. If the client refuses to disclose their date of birth, enter 1900-01-01. (**Note:** for birth years prior to 1923 must be entered manually as the calendar does not go earlier than one hundred years from the current year)
7. Select **Gender**
8. **Alternative ID** – enter if HCN is not available (e.g. birth certificate, drivers license)
9. **Inactive** – use this field for clients who are deceased or moved out of province
10. **Indigenous:** Select as appropriate after the client has self-disclosed. If **Other Indigenous** is selected, the **Other Indigenous - Specify** field is mandatory.

## Vaccine Related Section

11. Click on **Vaccination Event** and begin typing in your clinic name. It should appear in the drop down. Select it.
12. **Primary Care Provider** – type in provider’s name to search (if not found, move to next section)
13. Click on **Reason for Immunization**
14. **Institution** – When the following Reason for Immunization values are selected, the institution field becomes **mandatory**
  - **Child and Youth Eligible Population:** All Ontario schools and childcare facilities have been uploaded into COVaxON for selection from the “Institution” field. The client’s school or childcare centre should be searched and selected from the Institution field. If the school or childcare centre is not found in COVaxON, use one of the following options.

INSTITUTION ID	INSTITUTION NAME
SC0001	Home School
SC0002	Not in School
SC0003	School: Unlisted
SC0004	Post-Secondary School
LCC0001	LCC0001 – Unlisted: Child Care Centre
HCC0001	HCC0001 – Unlisted: Home Child Care Agency



**Note:** When a client is tagged to the “Child and Youth Eligible Population” Reason for Immunization, the Institution field becomes mandatory. Users should select the youth’s school (that they are attending in the current school year) as the corresponding Institution value.

- **Congregate Living:** Resident/Staff/Essential Caregiver
- **Long Term Care:** Healthcare Worker, Resident, Other Employee, Essential Caregiver, Other Non-Employee

- **Retirement Home:** Health care Worker, Resident, Other Employee, Essential Caregiver, Other Non-Employee

**Vaccine Related**

<p>Immediate AEFI <span style="font-size: 0.8em;">i</span> <input type="checkbox"/></p>	<p>Appropriate Documentation Shown <span style="font-size: 0.8em;">i</span> <input type="checkbox"/></p>
<p>Vaccination Event <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">11</span> <input style="width: 150px;" type="text" value="Search Vaccination Events..."/> <span style="font-size: 0.8em;">Q</span></p>	<p>Reason for Immunization <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">13</span> <input style="width: 150px;" type="text" value="--None--"/></p>
<p>Primary Care Provider <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">12</span> <input style="width: 150px;" type="text" value="Search Providers..."/> <span style="font-size: 0.8em;">Q</span></p>	<p>Institution <span style="font-size: 0.8em;">i</span> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">14</span> <input style="width: 150px;" type="text" value="Search Institutions..."/> <span style="font-size: 0.8em;">Q</span></p>
<p>Reason vaccine was not administered <input style="width: 150px;" type="text" value="--None--"/></p>	

### Contact Information Section

15. **Phone Numbers** – Enter Mobile/Home/Other

16. **Email** – When asking the client for their email, use the text in the information box next to the email field to explain to the clients what they are consenting to when they provide email/phone number details. If client does not provide email, they will not receive an email copy of their certificate of vaccination.

**Contact Information**

You may be contacted by a hospital, local public health unit, or the Ministry of Health for purposes related to the COVID-19 vaccine (for example, to remind you of follow up appointments and to provide you with proof of vaccination). If you consent to receiving these follow up communications by email or text/SMS, please indicate this using the boxes below

Mobile

Other Phone

Email i

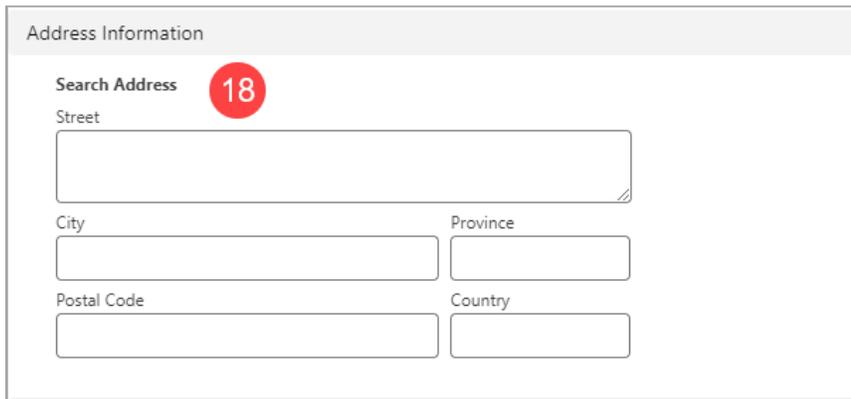
17. **Proxy** – Enter Name/Phone and relationship to client (if applicable). If there is no proxy for the client, leave this field blank.

**Contact Information**

<p>Mobile <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">15</span> <input style="width: 150px;" type="text"/></p>	<p>Home Phone <input style="width: 150px;" type="text"/></p>
<p>Other Phone <input style="width: 150px;" type="text"/></p>	<p>Work Phone Ext. <input style="width: 150px;" type="text"/></p>
<p>Email <span style="font-size: 0.8em;">i</span> <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">16</span> <input style="width: 150px;" type="text"/></p>	
<p>Preferred Method for Communication <input style="width: 150px;" type="text" value="--None--"/></p>	
<p>Preferred Language <input style="width: 150px;" type="text" value="English"/></p>	<p>Secondary Language <input style="width: 150px;" type="text" value="--None--"/></p>
<p>Proxy Name <span style="color: red; font-weight: bold; border-radius: 50%; padding: 2px 5px;">17</span> <input style="width: 150px;" type="text"/></p>	<p>Proxy Phone <input style="width: 150px;" type="text"/></p>
<p>Relationship to the Client <input style="width: 150px;" type="text" value="--None--"/></p>	

## Address Information Section

18. Using the **Search Address** bar, begin typing in client address and once it populates, select it. Ensure that it populates the address correctly, including the postal code. If the postal code is not in the correct format (L3L 3L3 with a space in the middle), COVaxON will not let you save the record. (This is how the PHU is calculated for a client, so it is important that this field is used correctly. This is related to the client's postal code).



Address Information

Search Address **18**

Street

City Province

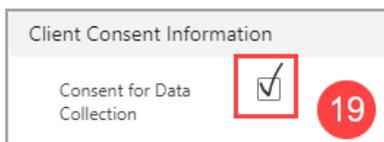
Postal Code Country

## Client Consent Information Section

19. Select the checkbox for **Consent for Data Collection** once consent obtained from client.



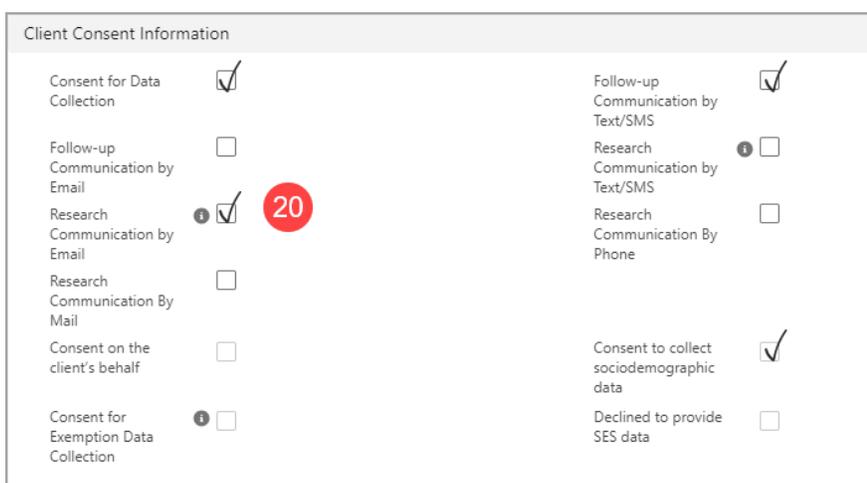
**Note: If this field is not populated, you will not be able to enter the dose the client will be receiving.** You are required to select this box for the client's **first dose**.



Client Consent Information

Consent for Data Collection  **19**

20. Select any of the following checkboxes that the client agrees to.



Client Consent Information

Consent for Data Collection	<input checked="" type="checkbox"/>	Follow-up Communication by Text/SMS	<input checked="" type="checkbox"/>
Follow-up Communication by Email	<input type="checkbox"/>	Research Communication by Text/SMS	<input type="checkbox"/>
Research Communication by Email	<input checked="" type="checkbox"/> <b>20</b>	Research Communication By Phone	<input type="checkbox"/>
Research Communication By Mail	<input type="checkbox"/>	Consent to collect sociodemographic data	<input checked="" type="checkbox"/>
Consent on the client's behalf	<input type="checkbox"/>	Declined to provide SES data	<input type="checkbox"/>
Consent for Exemption Data Collection	<input type="checkbox"/>		

21. Click **Save**. The client is now entered in the system.

# Maintaining Client Information

Click on the link to access the topic within this section.

- [Updating Client Information](#)
- [Gather Sociodemographic Information](#)
- [Provincial Registry Remediation](#)
- [Duplicate Client Records](#)
- [Client with Historical Doses Not Found in COVaxON](#)
- [Marking Client as Inactive](#)

## UPDATING CLIENT INFORMATION

Every time a client presents themselves at a clinic, the client's profile needs to be **verified and updated**, as necessary.

From the **Client Details** tab, click on any pencil icon to edit the client's details and confirm the following:

1. **Client Name**
2. **Alias** – if applicable.
3. **Verified Chosen Name** – The chosen name checkbox and chosen name fields are available to support transgender Ontarians who are in the process of changing their legal (current) name to their chosen name.
  - Verify the users ID.
  - Select the check box for **Verified Chosen Name**.
    - i. If the checkbox is selected, the values entered in Chosen Name will appear on the client's enhanced vaccine certificate from the provincial portal.
    - ii. If the checkbox is not selected, the Client's Legal Name will appear on the client's enhanced vaccine certificate from the provincial portal.
  - Enter the chosen name(s) into the chosen name fields – Chosen First Name, Chosen Middle Name and/or Chosen Last Name as needed
4. **Health Card Number** (10-digits only, no version code and no spaces)
  - If no HCN is available, confirm/update alternate ID from the drop down
5. **Birthdate** – 1900-01-01 is the default date when the client's birthdate was missing/unknown at the time of uploading clients into COVaxON. Ensure to verify birthdates for all clients. If the client refuses to disclose their date of birth, enter 1900-01-01. (**Note:** for birth years prior to 1923 you must manually enter, as the drop down does not go earlier than one hundred years from the current year)
6. Select **Gender**
7. **Alternative ID** – enter if HCN is not available (e.g. birth certificate, drivers license)
8. **Inactive** – use this field for clients who are deceased or moved out of province
9. **Indigenous:** Select as appropriate after the client has self-disclosed. If "Other Indigenous" is selected, the "Other Indigenous Specify" field is mandatory.

## Vaccine Related Section

10. **Vaccination Event (VE)** – double check the VE is correct to ensure you are using the vaccine inventory allocated to your clinic
11. **Primary Care Provider** – type in provider’s name to search (if not found, move to next section)
12. **Reason for Immunization** – confirm the current selection still applies to your client
13. **Institution** – When the following Reason for Immunization values are selected, the institution field becomes **mandatory**
  - **Child and Youth Eligible Population:** All Ontario schools and childcare facilities have been uploaded into COVaxON for selection from the “Institution” field. The client’s school or childcare centre should be searched and selected from the Institution field. If the school or childcare centre is not found in COVaxON, use one of the following options.

INSTITUTION ID	INSTITUTION NAME
SC0001	Home School
SC0002	Not in School
SC0003	School: Unlisted
SC0004	Post-Secondary School
LCC0001	LCC0001 – Unlisted: Child Care Centre
HCC0001	HCC0001 – Unlisted: Home Child Care Agency



**Note:** When a client is tagged to the “Child and Youth Eligible Population” Reason for Immunization, the Institution field becomes mandatory. Users should select the youth’s school (that they are attending in the current school year) as the corresponding Institution value.

- **Congregate Living:** Resident/Staff/Essential Caregiver
- **Long Term Care:** Healthcare Worker, Resident, Other Employee, Essential Caregiver, Other Non-Employee
- **Retirement Home:** Healthcare Worker, Resident, Other Employee, Essential Caregiver, Other Non-Employee

Vaccine Related

Immediate AEFI i

Appropriate Documentation Shown i

Vaccination Event 10

Reason for Immunization 12

Primary Care Provider 11

Institution i 13

Reason vaccine was not administered

## Contact Information Section

14. **Phone Numbers** – Enter Mobile/Home/Other

15. **Email** – When asking the client for their email, use the text in the information box next to the email field to explain to the clients what they are consenting to when they provide email/phone number details. If client does not provide email, they will not receive an email copy of their certificate of vaccination.

Contact Information

You may be contacted by a hospital, local public health unit, or the Ministry of Health for purposes related to the COVID-19 vaccine (for example, to remind you of follow up appointments and to provide you with proof of vaccination). If you consent to receiving these follow up communications by email or text/SMS, please indicate this using the boxes below

Mobile

Other Phone

Email i

16. **Proxy** – Enter Name/Phone and relationship to client (if applicable). If there is no proxy for the client, leave this field blank.

Contact Information

Mobile 14

Home Phone

Other Phone

Work Phone Ext.

Email i 15

Preferred Method for Communication

Preferred Language

Secondary Language

Proxy Name 16

Proxy Phone

Relationship to the Client

## Address Information Section

17. Using the **Search Address** bar, begin typing in client address and once it populates, select it. Ensure that it populates the address correctly, including the postal code. If the postal code is not in the correct format (L3L 3L3 with a space in the middle), COVaxON will not let you save the record. (This is how the PHU is calculated for a client, so it is important that this field is used correctly. This is related to the client's postal code).

Address Information

Search Address **17**

Street

City Province

Postal Code Country

### Client Consent Information Section

18. Select the checkbox for **Consent for Data Collection** once consent obtained from client.

 **Note: If this field is not populated, you will not be able to enter the dose the client will be receiving.** You are required to select this box for the client's **first dose**.

Client Consent Information

Consent for Data Collection  **18**

19. Select any of the following checkboxes that the client agrees to.

Client Consent Information

Consent for Data Collection <input checked="" type="checkbox"/>	Follow-up Communication by Text/SMS <input checked="" type="checkbox"/>
Follow-up Communication by Email <input type="checkbox"/>	Research Communication by Text/SMS <input type="checkbox"/>
Research Communication by Email <input checked="" type="checkbox"/> <b>19</b>	Research Communication By Phone <input type="checkbox"/>
Research Communication By Mail <input type="checkbox"/>	Consent to collect sociodemographic data <input checked="" type="checkbox"/>
Consent on the client's behalf <input type="checkbox"/>	Declined to provide SES data <input type="checkbox"/>
Consent for Exemption Data Collection <input type="checkbox"/>	

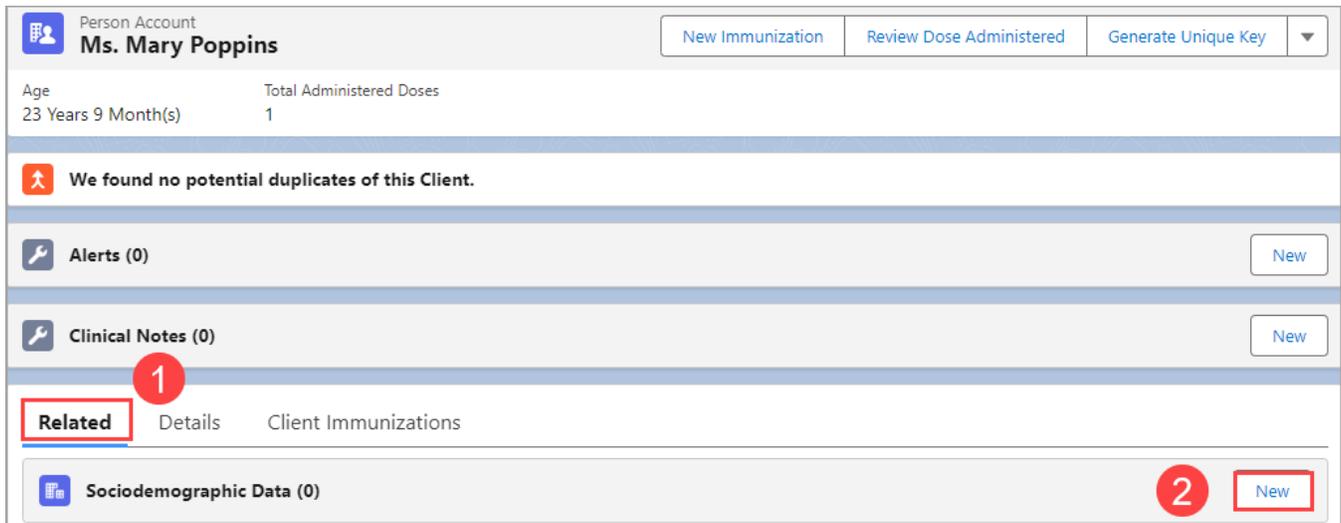
20. Click Save. The client is now updated in the system. Continue to the next step [Gather Sociodemographic Information](#).

## GATHER SOCIODEMOGRAPHIC INFORMATION

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

 **Note:** If this information is already populated, you will not be required to request the sociodemographic information again.

1. From the client record, click on the **Related** tab.
2. Under Sociodemographic Data, click **New**.



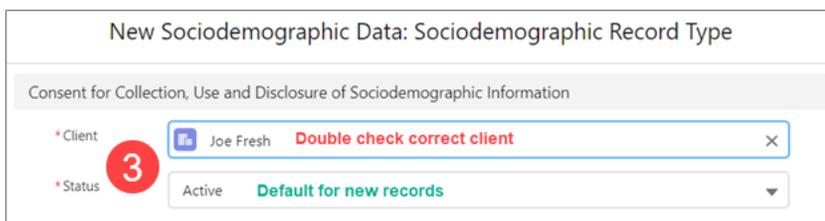
Person Account  
**Ms. Mary Poppins**

Age: 23 Years 9 Month(s) | Total Administered Doses: 1

**Related** | Details | Client Immunizations

Sociodemographic Data (0) **2** **New**

3. Confirm the following:
  - a. **Client** will prepopulate with client's name
  - b. **Status** will prepopulate as **Active**. Keep this option for new records.



New Sociodemographic Data: Sociodemographic Record Type

Consent for Collection, Use and Disclosure of Sociodemographic Information

\* Client: Joe Fresh **3** Double check correct client

\* Status: Active Default for new records

4. Read the Sociodemographic Consent Details to the client.
  - a. If consent is obtained, select the checkbox for **Consent to collect sociodemographic data** and continue to next step.
  - b. If client declined consent, select the checkbox for **Decline to provide SES data** and **Save** the record. Even though the client declined, saving the declined record will make the next immunizer aware to not ask the client again. Continue to [Entering a Dose at Point of Service](#).

Do you consent to providing your information to the Ministry?

Consent to collect sociodemographic data  **Select if client consents** 4

Declined to provide SES data  **Select if client declined consent**

5. If the client consented to collection of Sociodemographic Information, complete the following sections the client answers. If the client does not want to answer a specific question, you may select **Prefer not to answer**.
  - **Race/Ethnicity** - Select from the available options and use the right arrow to choose the option or use the free text field if needed. The left arrow can be used to move items out of the Chosen box
  - **Total household income** – Select household income range from drop-down options
  - **Household size** – Select the number of people in the client’s household
  - **Childhood language** - Select the language the client first learned and still understands from the options listed or use the free text field if needed
  - **Official Language** - Select which of the Canadian official languages the client is most comfortable speaking
6. Once all information is updated, click **Save**

Sociodemographic Data

**Race** ⓘ

Available: Black, East Asian, Latino

Chosen: [Empty]

Another race category- Please specify: [Text Field]

**Ethnicity** ⓘ

Available: Aboriginal (Central/So..., Acadian, Afghan

Chosen: [Empty]

Other ethnicity- Please specify: [Text Field]

- Select Race & Ethnicity from the options in the 'Available' field.  
 - Select the arrow to move to the 'Chosen' field.

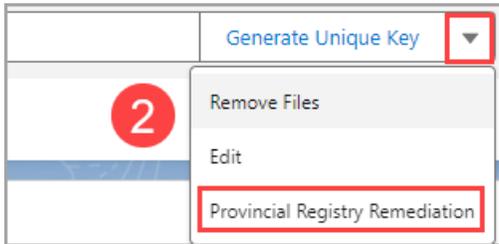
Cancel Save & New **Save** 6

 **Note:** Users can edit the sociodemographic record after entry. The record cannot be deleted. If the record was entered in the incorrect client, the *Status* can be changed to *Entered in Error*.

## PROVINCIAL REGISTRY REMEDIATION

This tool can be used to validate a client's Health Card Number or update client demographic information.

1. [Navigate to the client profile page](#)
2. In the top right-hand corner click on the down arrow, select **Provincial Registry Remediation**



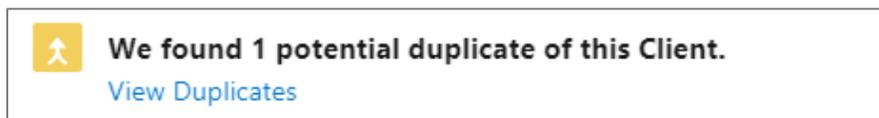
3. The Client's information screen will then appear with Provincial Health Card validation information. Update current information only if client can confirm the Provincial Registry is correct.
4. Click **Next**. The client's record will be updated with your changes.



**Note:** If COVaxON recognizes a duplicate, the system will not allow you to update client demographics. Update directly in the client's details page.

## DUPLICATE CLIENT RECORDS

Occasionally, duplicate clients can appear in the COVaxON system. If COVaxON recognizes a duplicate client, you may see the following message on their profile:



If you need to add an administered dose or update a client profile, but there appears to be one or more duplicates and a merge has not been completed yet, please refer to this chart for recommendations on how to decide which client profile to update.

SCENARIO	STEPS TO TAKE
----------	---------------

<p>One file has all doses and duplicate has none</p>	<ul style="list-style-type: none"> <li>• Enter the administered dose in the file that contains the other doses received by the client</li> <li>• Email <a href="mailto:IDCDSystems@york.ca">IDCDSystems@york.ca</a> to merge</li> </ul>
<p>Duplicate file has HCN and no doses</p>	<ul style="list-style-type: none"> <li>• Remove HCN from duplicate client record</li> <li>• Add HCN to file with doses</li> <li>• Email <a href="mailto:IDCDSystems@york.ca">IDCDSystems@york.ca</a> to merge</li> </ul>
<p>Both files have doses</p>	<ul style="list-style-type: none"> <li>• Enter in the file that contains the most recent dose (or based on what makes sense upon review of client profiles)</li> <li>• Email <a href="mailto:IDCDSystems@york.ca">IDCDSystems@york.ca</a> to merge</li> </ul>



**Note:** If COVaxON tagged a client as a potential duplicate, and it is not a true duplicate, the client cannot be untagged. If the demographic information is close (i.e. twin with similar name) enter an [Alert](#) in both client files stating the client tagged (include ID #) are not duplicates.

## CLIENT WITH HISTORICAL DOSES NOT FOUND IN COVAXON

If a client has received COVID-19 immunizations outside of Canada or outside of Ontario, and they are not recorded in COVaxON, use the criteria below to determine next steps:

- If they are a resident of York Region, direct them to visit <https://www.york.ca/form/out-of-province-covid-vaccine> to report the required information and have their doses updated in the COVaxON system.
- If they are not a resident of York Region, direct them to report the dose information to their local Public Health Unit for entry in COVaxON.

## MARKING A CLIENT AS INACTIVE

From the client record, clients can be marked as **Inactive** and is only used when the client is deceased or moved out of province. 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. If the client

has a health card number on file, COVaxON will update the client's record after the health card record is updated.

1. Navigate to the desired [client's record](#).
2. Click on the **Pencil** icon next to any field on the client record to update.
3. Click on the checkbox next to **Inactive**.
4. Select an Inactive Reason from the dropdown. Options include 'Deceased' or 'Moved out of Province'
5. If 'Deceased' is selected and the **Date of Death** is known, select a date. If the **Date of Death** is unknown, this field can be left blank.



The screenshot shows a form with three rows. The first row is labeled 'Inactive' and has a red circle with the number '3' next to a checked checkbox. The second row is labeled 'Inactive Reason' and has a red circle with the number '4' next to a dropdown menu showing 'Deceased'. The third row is labeled 'Date of Death' and has a red circle with the number '5' next to a date input field showing '2023-12-05'.

6. Click **Save** on the client record.

## System Alerts

Vaccinators 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 (i.e. additional comments, any AEFI details). This alert appears as a banner on the top of the client record.

### ALERT TYPES

#### Warning Alert

- **Warning** may be for a client who has a fear of needles.

#### AEFI Alert

- **AEFI** may be for any specific information related to an AEFI they experienced on their previous dose.

#### Eligible for Shortened Interval Alert

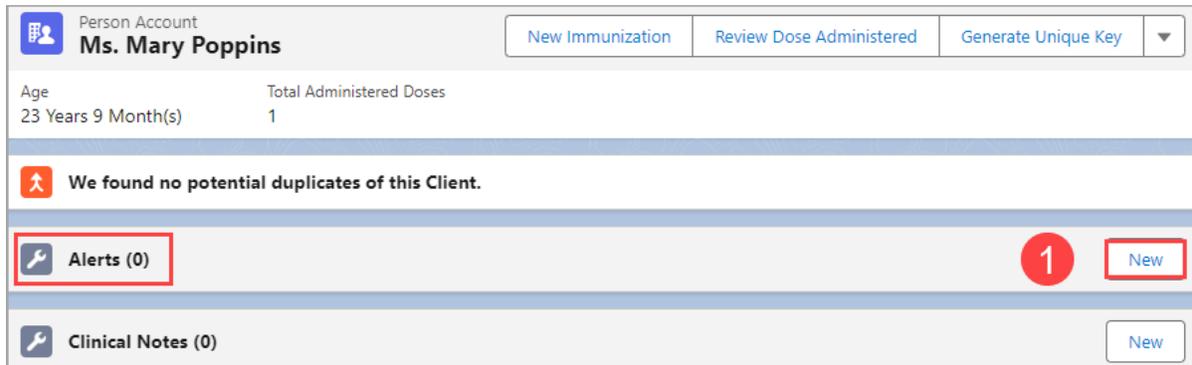
- **Eligible for Shortened Interval** may be used for clients who meet the eligibility requirements for a shortened dose interval.

#### High Risk Client Alert

- **Highest Risk** may be for clients considered to have a highest risk health condition or have received EVUSHELD.

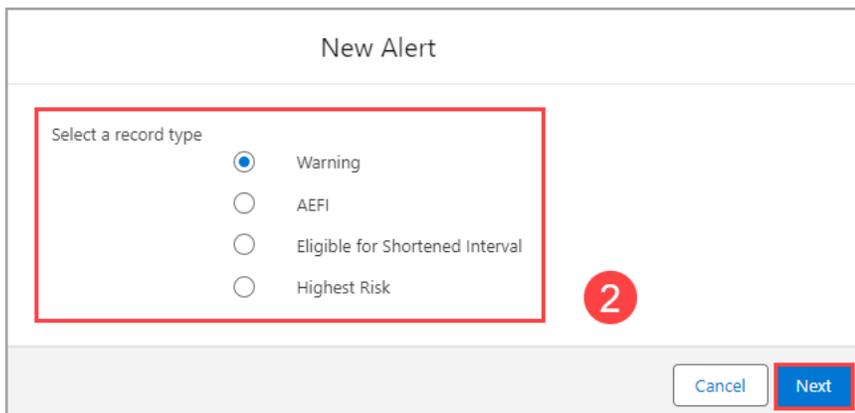
# CREATING AN ALERT

1. From the client's record, in the **Alerts** section, select **New**.



2. Select **Alert Type** being created:

- i. Warning
- ii. AEFI
- iii. Eligible for Shortened Interval
- iv. Highest Risk



3. Populate Alert fields, then select **Save**:

- **Alert Name:** Description of alert
- **Comments:** Any additional comments about the situation
- **Client:** Auto populated from the client record alert is created from and should not be updated
- **Start Date:** Date the alert is being entered
- **End Date:** Leave blank
- **Status:** Input "Active" when initially creating the alert

New Alert: Warning

Information

\* Alert Name

↶

Comments
↶

\* Client

✕

\* Start Date

📅

End Date

📅

Status

▾

↶

3

### Notes:

- Alerts can be viewed by all users and are helpful for information purposes, including determining how to proceed with the client's vaccination.
- The alert appears on the client record regardless of status or end date
- The **End Date** field and **Completed** status may be added in cases whereby the alert no longer applies, for example if the client was originally pregnant and is no longer pregnant. Another example may be if the vaccinator determined during the pre-screening that the client should return after certain symptoms subside and entered an alert to indicate that. The end date cannot be in the past.
- The **Cancelled** status may be added if the alert was entered by mistake.
- The **Created By** field indicates the date/time the user entered the alert
- Users cannot delete alerts and only the creator of the alert can edit the **Comments**.

## Clinical Notes

Clinical Notes should be used to document all significant findings related to assessment, decision making and immunization. This complies with the COVID-19 Practice Standards as the notes cannot be altered or removed.

## ENTERING A CLINICAL NOTE

1. In the **Clinical Notes** section of the client record, select the arrow and select **New**.

The screenshot shows the client record for Ms. Mary Poppins. At the top, there are buttons for 'New Immunization', 'Review Dose Administered', and 'Generate Unique Key'. Below this, the client's age is listed as '23 Years 9 Month(s)' and 'Total Administered Doses' as '1'. A message states 'We found no potential duplicates of this Client.' There are sections for 'Alerts (0)' and 'Clinical Notes (0)'. The 'Clinical Notes (0)' section is highlighted with a red box, and a red circle with the number '1' is placed over the 'New' button next to it.

2. Enter the required clinical note fields:

- **Client:** Auto populated from the client record the note is created from and should not be updated
- **Clinical Note Subject:** Type of note
- **Clinical Note:** Description of the situation
- **Clinical Note Status:** Select **Active**
- Click **Save**.

The screenshot shows the 'New Clinical Note' form. At the top, it says 'New Clinical Note' and '\* = Required Information'. The form is divided into sections. The 'Information' section contains a 'Clinical Note ID' field, a '\*Client' dropdown menu with 'Mary Poppins' selected, and a 'Clinical Note Status' dropdown menu with 'Active' selected. Below this, there are two text input fields: '\*Clinical Note Subject' with the placeholder 'Enter Clinical Note Subject' and '\*Clinical Note' with the placeholder 'Enter pertinent details of clinical note'. A red box highlights these two input fields, and a red circle with the number '2' is placed next to it. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

### Notes:

- Clinical Notes cannot be edited once they are created and are limited to **5000** characters.
- **Entered in Error** status can be used if the note was entered by mistake: for example, if entered on the incorrect client or on a duplicate client.

# Entering a Dose at Point of Service

## ENTER DOSES ADMINISTERED FROM CLIENT PROFILE

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

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**.



Person Account	
<b>Ms. Mary Poppins</b>	
Age	Total Administered Doses
23 Years 9 Month(s)	1

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**.



New Immunization

\* Please select

Administered - Point of Service

Historical

Next

4. 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 the correct VE from a list of active VEs linked to your organization from the lookup field and click Next.

New Immunization

---

New Immunization - Administered - Point of Service

\*Vaccination Event

4
Q

Please ensure correct VE is selected

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

New Immunization

---

New Immunization - Administered - Point of Service

\*Select Vaccine

--None--

--None--

Moderna SPIKEVAX 0.2 mg/ml COVID-19 mRNA 0.50 ml - 9999, 2022-02-14

Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5) 0.30 ml - YYY23, 2023-05-01

5

6. The **Dose Information** page is displayed with the following fields:
  - a. 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.
  - b. Reason vaccine was not administered (checkbox) – if **No** (client should not receive vaccine), indicate that the pre-screening assessment 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.

New Immunization

---

**New Immunization - Administered - Point of Service**

The Vaccine Information Sheet has been reviewed and client consents to receiving the vaccine and all recommended doses in the series. a

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).

\* Reason vaccine was not administered

--None-- b

**Reminder: Please add the missing Primary Care Provider information on the client screen if known.**

- c. **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.
- **Proxy Name** – (required field)
  - **Proxy Phone** – (optional field)
  - **Proxy Relationship to the Client** – (required field)

New Immunization

---

**New Immunization - Administered - Point of Service**

The Vaccine Information Sheet has been reviewed and client consents to receiving the vaccine and all recommended doses in the series. c

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).

\* Proxy Name

Proxy Phone

\* Relationship to the Client

--None--

- d. **Pre-assessment completed, risks and benefit communicated with client.**  
Ensure that you review the pertinent information with the client prior to administering the vaccine and check the checkbox.

**New Immunization - Administered - Point of Service**

The Vaccine Information Sheet has been reviewed and client consents to receiving the vaccine and all recommended doses in the series.

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).

**Vaccine :** Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5) 0.30 ml - YYY23, 2023-05-01

Pre-assessment completed, risks and benefits communicated with client d

- e. **Vaccine** – text display of vaccine product selected from the VEI

- f. **Diluent Event Inventory** – (required field for vaccines that have diluent, i.e. Pfizer adult and pediatric). If more than one diluent is being used at the clinic, users must select the diluent for vaccines requiring diluent. This field will not appear if the vaccine does not require a diluent.
- g. **Route** – (required field). Will default to intramuscular
- h. **Anatomical Site** – (required field) Select applicable site: most often right or left deltoid
- i. **Dosage Administered**
  - If the product has one standard dosage, this field will default to the standard dosage of the product – e.g. Pfizer Bivalent will default to 0.3
  - If product has the option to select two or more dosages, the default will be **None** and user will need to select the dosage the client received and is eligible for – e.g. Moderna XBB, select 0.25 or 0.5

The image shows a screenshot of a software interface for a dropdown menu titled '\* Dosage Administered'. The menu is open, showing three options: '--None--', '0.5', and '0.25'. The '--None--' option is highlighted with a blue bar. A red circle with a white lowercase letter 'i' is overlaid on the '--None--' option, indicating an information or warning message.

- j. **Dosage Unit of Measure** – default value is ‘ml’
  - k. **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. Date/time cannot be set in future.
  - l. **Country Vaccine was Administered** – will be pre-populated as ‘Canada’
  - m. **Vaccination Event** – auto populated based on previous entry
  - n. **Administered By** – This field will auto-populate if user is listed as a provider in COVaxON. In a scenario where two or more users exist with the same first name and last name, no value will be pre-populated in this field.
    - If you are entering the dose on behalf of the vaccinator and you are also a provider in COVaxON, click on the x to remove your name. Start typing the vaccinator’s name and select the correct person when you see them.
    - If you are not a vaccinator in COVaxON, this field will be blank. Start typing the vaccinator’s name and select the correct person when you see them. A provider can also search vaccinator’s registration number.
  - o. **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.
7. Double check all details entered are correct. Doses information cannot be edited once saved. Click **Finish**. A new client immunization record is created with a Status of ‘Administered.’

- In COVaxON, if the client has an email address populated and the checkbox for Follow-up Communication by Email is checked off, the client will automatically receive an email with the URL link to retrieve their receipt.



**Note:** Duplicate Dose Entry - If the dose is not appearing in the Client Immunization tab, refresh your browser. If you try to enter the dose again, you will receive a Warning message is displayed to user indicating a valid dose already exists for the client and if they wish to continue.

## Reviewing an Immunization Record

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.

- On the Person Account page, select the immunization record from the **Client Immunizations tab**.
- The Immunization Details page will display with the following sections and tabs:

### GENERATE RECEIPT BUTTON

- Generate a proof of vaccination receipt.

### CLIENT IMMUNIZATION SECTION

Client Immunization			
DA- 1234		<a href="#">Generate Receipt</a>	
Client	Record Type	Days Since Immunization	Status
<a href="#">Test Client</a>	Administered	2	Administered
<b>Vaccine Product Information</b>			
Product : <a href="#">Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5)</a>		Diluent Product :	
Product Lot : <a href="#">Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5) - GK0924, 2023/08/31</a>		Diluent Product Lot :	
Agent : <a href="#">COVID-19 mRNA</a>			

- Client** – displays the client's first and last name
- Record Type** – 'Administered' or 'Historical'
- Days Since Immunization** – displays the number of days count since the client received an immunization
- Status** – displays the status of the immunization record
- 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’s 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

## BASIC DETAILS TAB

This tab displays information recorded during the immunization record flow.

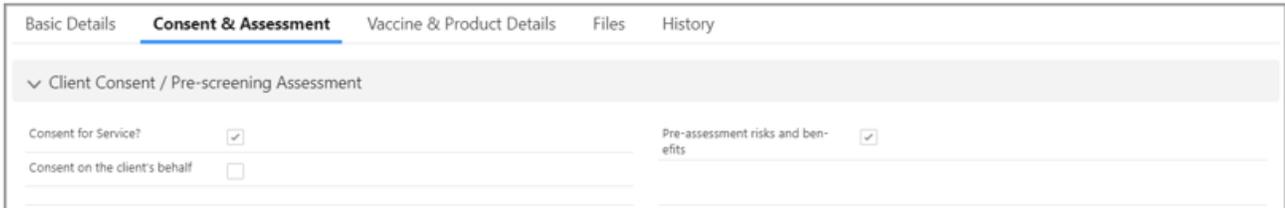
Basic Details		Consent & Assessment		Vaccine & Product Details		Files		History	
Basic Details									
Client	Test Client			Vaccination Event	YRPH - 9060 Jane St Vaccine Clinic				
Dose Administration	DA- 1234			Reason for Immunization	Age Eligible Population				
Sub-type	Point of Service			Immediate AEFI	<input type="checkbox"/>				
Days Since Immunization	2			Source	Health Care Provider				
Country Vaccine Administered	Canada			Authorized Organization	York Region Public Health				

- **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’ for POS
- **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
- **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
- **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 a software interface with a tabbed menu at the top. The tabs are 'Basic Details', 'Consent & Assessment' (which is selected and highlighted in blue), 'Vaccine & Product Details', 'Files', and 'History'. Below the tabs is a section titled 'Client Consent / Pre-screening Assessment' with a downward-pointing chevron. Under this section, there are two rows of form fields. The first row has 'Consent for Service?' with a checked checkbox and 'Pre-assessment risks and benefits' with a checked checkbox. The second row has 'Consent on the client's behalf' with an unchecked checkbox.

- **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 Risk 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 immunization flow.

Basic Details		Consent & Assessment		<b>Vaccine &amp; Product Details</b>		Files		History	
<div style="background-color: #f2f2f2; padding: 5px;">           ✓ Dose Details         </div>									
Route	Intramuscular / intramusculaire			Dosage Administered	0.3				
Anatomical Site	Left deltoid / deltoid gauche			Dosage Unit of Measure	ml				
Vaccination Date	2022-10-26, 3:01 p.m.			Administered By (Other)					
Administered By	<div style="background-color: #e0e0e0; padding: 2px;"> <span style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;">Registered Nurse,</span> </div>								
<div style="background-color: #f2f2f2; padding: 5px;">           ✓ Clinical Guidelines Exception Details         </div>									
Outside of Clinical Guidelines	<input type="checkbox"/>			Reason for Exception					
<div style="background-color: #f2f2f2; padding: 5px;">           ✓ Inventory Details         </div>									
Vaccine Event Inventory	<a href="#">Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5) 0.30 ml - GK0924, 2023-08-31</a>			Diluent Event Inventory					
Site Location-Vaccine	YRPH - 9060 Jane St Vaccine Clinic (Vaughan)			Site Location-Diluent	YRPH - 9060 Jane St Vaccine Clinic (Vaughan)				
Org Vaccine Inventory	<a href="#">Pfizer-BioNTech COMIRNATY Bivalent (BA.4/BA.5) 0.30 ml - GK0924, 2023-08-31</a>			Org Diluent Inventory					
Vaccine Adjusted Expiration Date									
Diluent Adjusted Expiration Date									

- Dose Details section
- Clinical Guidelines Exception Details
- Inventory Details
- System Information

## FILES TAB

Provides users with the ability to upload required documents

Basic Details		Vaccine & Product Details		<b>Files</b>		History		
<div style="background-color: #f2f2f2; padding: 5px;"> <b>Files (1)</b> <span style="float: right; border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;">Add Files</span> </div>								
<div style="background-color: #e0e0e0; padding: 2px;"> <span style="font-size: 0.8em; font-weight: bold;">fe74bf1f-</span>            Sept 20, 2022 • 43KB • jpg         </div>								
<a href="#" style="color: #0070c0; text-decoration: none;">View All</a>								
<div style="background-color: #f2f2f2; padding: 5px;">           ✓ System Information         </div>								
Created By	<div style="background-color: #e0e0e0; padding: 2px;"> <span style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;"></span> </div>			2022-09-20, 3:12 p.m.	Last Modified By	<div style="background-color: #e0e0e0; padding: 2px;"> <span style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px;"></span> </div>		2022-09-20, 3:12 p.m.

## HISTORY TAB

An audit tracking and log of changes to the dose record

Basic Details		Consent & Assessment		Vaccine & Product Details		Files		<u>History</u>	
<input checked="" type="checkbox"/> <b>Client Immunization History (2)</b>									
Date	Field	User	Original Value	New Value					
2022-10-27, 8:50 a.m.	Created.								
2022-10-27, 8:50 a.m.	Dose Administration			DA-					
<a href="#">View All</a>									

## Documenting an Adverse Effect Following Immunization (AEFI)

### AEFI OCCURS IMMEDIATELY FOLLOWING IMMUNIZATION

If an AEFI occurs during the allocated wait period after the client's dose administration, treat the client appropriately and document the occurrence in COVaxON by populating the AEFI checkbox in the immunization record by following the steps below. **Note:** An [alert](#) must be recorded on the client's profile to document any key details related to the client that would be helpful for future dose administration.

 **Important:** The AEFI checkbox should only be populated if an AEFI occurs during the allocated wait time. If an AEFI occurs after the client has left the location (i.e., in the following days/weeks), the AEFI checkbox should not be selected in COVaxON.

1. If an AEFI occurs, complete the [AEFI Report](#) as per the Public Health Ontario AEFI Guidelines to record all pertinent details, and fax the completed form to York Region Public Health at 905-898-5213. You may also call our Nursing Line at 1-877-464-9675 Ext. 73452.
2. To record the AEFI in COVaxON, select the immunization record hyperlink from the **Client Immunizations tab** on the client page. The client immunization record details page is displayed.

 Person Account  
**Ms. Mary Poppins**

Age  
 23 Years 9 Month(s)

Total Administered Doses  
 1

 We found no potential duplicates of this Client.

 Alerts (0)

 Clinical Notes (0)

Related
Details
**Client Immunizations**

**Client Immunizations (1)**  
1 item • Sorted by Vaccination Date • Updated a few seconds ago

Dose Administration 2

	<input type="checkbox"/>	Dose Administration	Vaccination Date ↓	Vaccine Pr... ↓
1	<input type="checkbox"/>	DA-38928389	2022-05-31, 9:19 a.m.	

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.)

The screenshot shows the 'Client Immunization' interface for record DA-38928389. At the top, there is a 'Generate Receipt' button. Below this, a summary row shows: Client: Mary Poppins, Record Type: Administered, Days Since Immunization: 591, Status: Administered. A navigation bar includes 'Basic Details' (highlighted with a red box), 'Consent & Assessment', 'Vaccine & Product Details', 'Files', and 'History'. Under 'Basic Details', there are two columns of information. The left column includes: Client (Mary Poppins), Dose Administration (DA-38928389), Sub-type (Point of Service), Days Since Immunization (591), and Country Vaccine Administered (Canada). The right column includes: Vaccination Event (Ottawa General Hospital - TT), Reason for Immunization (Long Term Care: Resident), Immediate AEFI (checkbox checked, highlighted with a red box and a red circle with the number 3), Source (Health Care Provider), and Authorized Organization (Ottawa Public Health - TT). A pencil icon is visible next to the 'Immediate AEFI' checkbox.

4. Click **Save**. The AEFI checkbox is now updated on the client record.

This is a close-up of the 'Vaccine Related' section. It shows the 'Immediate AEFI' checkbox is checked. A red circle with the number 4 is overlaid on the checkbox.

5. Once saved, an [Alert](#) must be created on the client profile to complete the documentation record of the Adverse Effect Following Immunization. See instructions on [Creating an Alert](#) for guidance.

## Generating a Dose Receipt

Receipts generated through COVaxON will trigger an email to the client's email address in their file. The email will contain a link for the user to retrieve their Enhanced Vaccine Certificate through the Provincial portal. This link will work for clients with or without an HCN.

Click on the link to access the topic within this section.

- [Generate Receipt from COVaxON Directly to Client](#)
- [Generate Receipt Online Via Provincial Site](#)
- [Receipts NOT Generating – Troubleshooting](#)

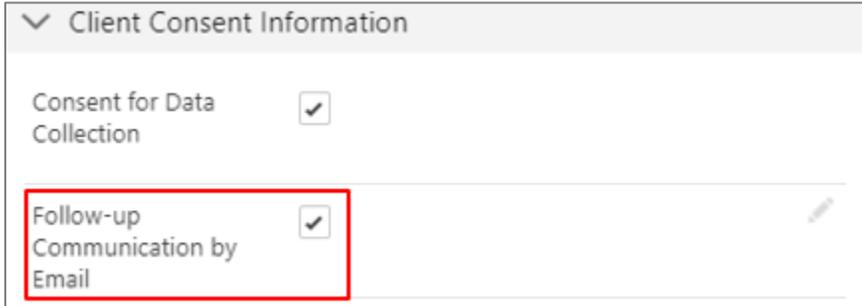
## GENERATE RECEIPT FROM COVAXON DIRECTLY TO CLIENT

Each time the user clicks the **Generate Receipt** button from the client dose administration record, a new URL link is created and will replace the current link displayed on the client

record. This new link will also be emailed to the client, which will direct them to the COVID-19 patient portal. The URL link will be valid for five (5) days.

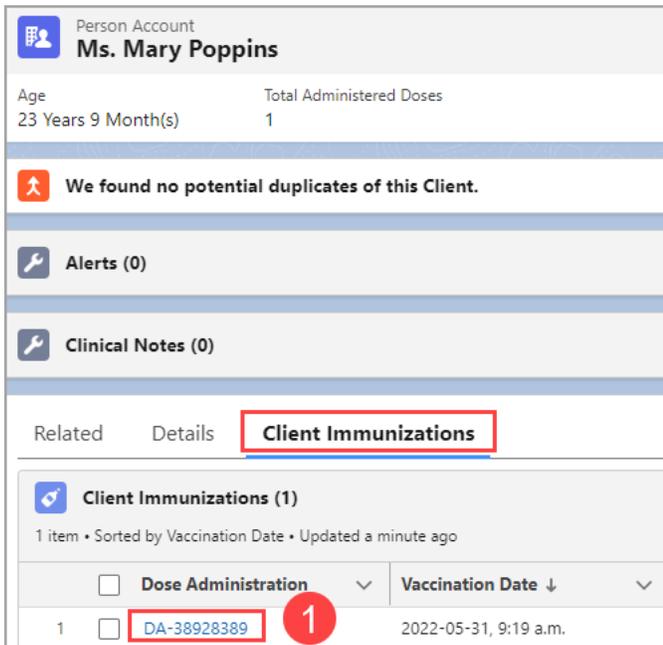
The client profile must provide a valid email address and in **Consent Section** the following must be checked:

- Consent for Data Collection
- Follow up Communication by Email



The screenshot shows a form titled "Client Consent Information" with a dropdown arrow on the left. It contains two rows of consent options. The first row is "Consent for Data Collection" with a checked checkbox. The second row is "Follow-up Communication by Email" with a checked checkbox. A red rectangular box highlights the "Follow-up Communication by Email" row.

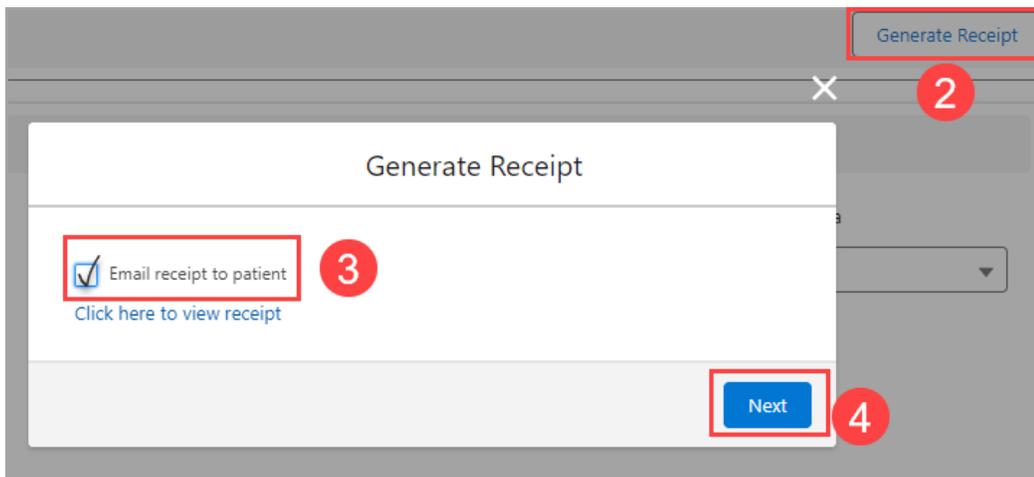
1. [Search for client](#) and navigate to the **Client Immunization tab**. Select one of the Dose Administration record hyperlinks. Receipts can be generated for all doses using any of the Dose Administration records that have a status of Administered.



The screenshot shows a user profile for "Ms. Mary Poppins" with age "23 Years 9 Month(s)" and "Total Administered Doses" of "1". Below the profile are sections for "Alerts (0)" and "Clinical Notes (0)". The "Client Immunizations" tab is selected and highlighted with a red box. Underneath, there is a table of immunizations with one entry highlighted by a red circle and a red "1" in a circle.

<input type="checkbox"/>	Dose Administration	Vaccination Date
1	<a href="#">DA-38928389</a>	2022-05-31, 9:19 a.m.

2. Click on **Generate Receipt**
3. Select **Email Receipt to Patient**
4. Click **Next**



The receipt will be emailed directly to the client.

## GENERATE RECEIPT ONLINE VIA PROVINCIAL SITE

Patients have the option to generate their own vaccine certificate from the Provincial repository for their records:

1. Navigate to <https://covid19.ontariohealth.ca/>
2. Have the patient follow the prompts on the Provincial website and enter their information to generate their vaccine certificate
3. The patient then has the option to save a digital copy or print a paper copy for their records.

## RECEIPTS NOT GENERATING – TROUBLESHOOTING

1. Client is unable to view receipt from Provincial Portal
  - a. Confirm client has Green Health Card.
  - b. Check in COVaxON that the client's Health Card Number (HCN) is valid using [Provincial Registry](#)
  - c. Client may have a duplicate file which contains the doses the client received. Merge client files.
2. Client states they did not receive their receipt after appointment, or receipt is not generating directly from COVaxON.
  - a. Verify client's email address in COVaxON is correct
  - b. Confirm Follow-up Communication by Email check box is selected
  - c. If the receipt is still not arriving to the patient, ask the patient for an alternate email to send receipt.

## Support Desk Information

SUPPORT DESK	HOURS OF OPERATION	CONTACT INFORMATION
<b>Provincial COVaxON Helpdesk</b>	Monday to Friday 8:00 AM to 5:00 PM (excludes statutory holidays)	<b>Phone:</b> 1-888-333-0640 <b>Email:</b> COVaxONsupport@ontario.ca
<b>York Region – IDCD Systems Team</b>	Monday to Friday 8:30 AM to 4:30 PM (excludes statutory holidays)	<b>Email:</b> IDCDSystems@york.ca

LOG IN ISSUE	ACTION
User has a COVaxON account but has <b>not logged in for over 30 days</b> and received notice upon attempt to 'contact system administrator'.	Send email to: <a href="mailto:IDCDSystems@york.ca">IDCDSystems@york.ca</a> <b>Subject line:</b> COVaxON Account reactivation required <b>Body:</b> Please reactivate user Jane Doe, Include your COVaxON username (e.g., the email you previously used to log into COVaxON)
User has missed the 24-hour window to activate the link they received.	User must call Provincial Helpdesk 1-888-333-0640
User tried the 'Forgot Your Password?' link and was unsuccessful.	User must call Provincial Helpdesk 1-888-333-0640
User tried the 'Forgot Your Password?' and had three unsuccessful attempts. The account is locked.	User must call Provincial Helpdesk 1-888-333-0640
User tried the 'Forgot Your Password?' link but never received an email.	User may not have a security question set up. User must call Provincial Helpdesk 1-888-333-0640
User having an issue with the Salesforce two-factor authenticator.	User must call Provincial Helpdesk -888-333-0640