COVax User Guide

Background

- COVax is the provincial software for documentation of all COVID-19 vaccinations.
- Users have been assigned one of three specific COVax roles by their organization:
    1. COVax Site Staff
    2. COVax Vaccinator
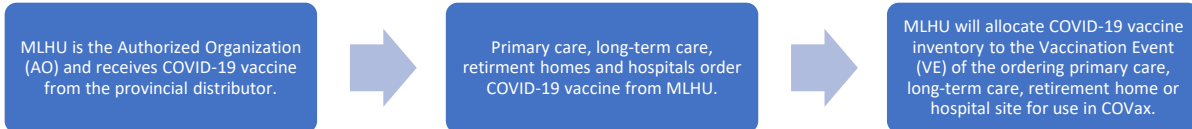   3. COVax Super User

Table of Contents

This resource is intended to guide COVax Users through each of the program functions. Please review and refer to the sections that are relevant to your user role.

What are Authorized Organizations and Vaccination Events? – ALL COVax Users

- Authorized Organizations (AOs) receive COVID-19 vaccines, or "inventory" from the provincial distributor.
- An AO can then further distribute to other sites, or Vaccination Events (VEs) in the community for vaccine administration.
- The Middlesex-London Health Unit (MLHU) is the Authorized Organization for all primary care providers, long-term care homes, retirement homes and hospitals in the Middlesex-London region. Each of these sites are VEs.
- Sites must not alter any of the information in their VE aside from activating and inactivating vaccine products.
- MLHU is not the AO of pharmacies.
- When a primary care provider, long-term care home, retirement home or hospital orders COVID-19 vaccines from MLHU via the Public Health Ordering System, MLHU will allocate the vaccine inventory to the site's VE for use in COVax.

| MLHU is the Authorized Organization (AO) and receives COVID-19 vaccine from the provincial distributor. | → | Primary care, long-term care, retirment homes and hospitals order COVID-19 vaccine from MLHU. | → | MLHU will allocate COVID-19 vaccine inventory to the Vaccination Event (VE) of the ordering primary care, long-term care, retirement home or hospital site for use in COVax. |

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

2

How to search for, create and update a Client Profile – ALL COVax Users
- **Always search for a client in COVax prior to creating a new one** to avoid making a duplicate Client Profile.
- Most clients will already have a profile in COVax. A client's profile may need to be updated depending on where they are being vaccinated, if they have had a name change, or have new contact information.

Searching for a client profile
1. Click on the "Client Search" tab.

For clients who have an Ontario Health Card
2. If the client has an Ontario Health Card, type the number into the Health Card Number search bar and click on the blue "Search Client" button. If a client with that Ontario Health Card number already has a profile in COVax, their profile will come up as a result.
3. If you search for a client using their Ontario Health Card but no results are found, it is possible that they have a profile in COVax but their Health Card Number has not yet been added to their profile. Continue using one of the alternative search methods listed below.

Alternative search options (i.e. no Ontario Health Card)
4. Client name, birthday, address and phone number can also be used to search for a client in COVax. To search using demographic information, use the free text search box at the top of the webpage.
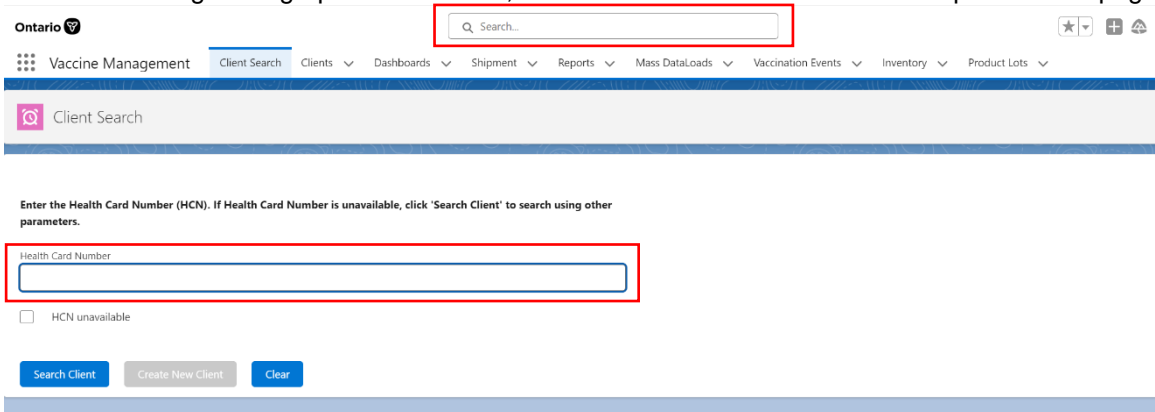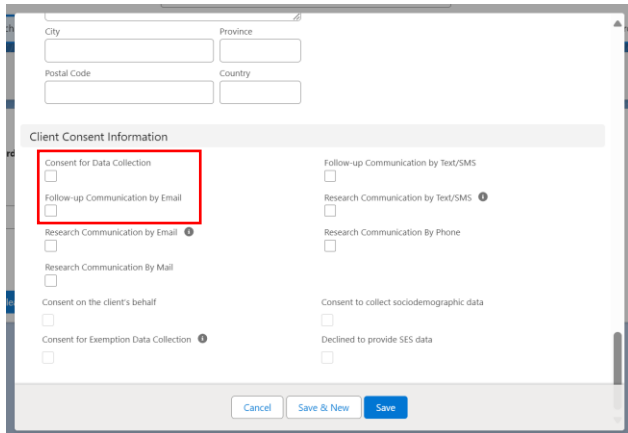

Creating a Client Profile
1. Click on the arrow inside the "Clients" tab.
2. To create a new client profile, click on the "+ New Client" option.
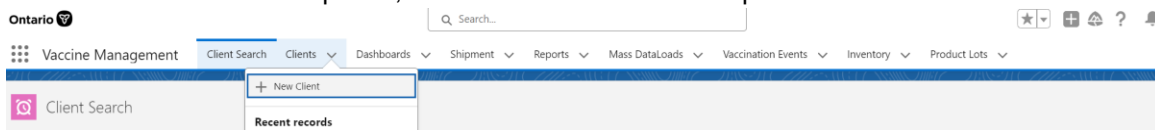
3. Enter the following information when setting up a new client profile:
   o All the demographic information available for the client.
   o The VE for the site where the client will be vaccinated
   o Client consent information (this is NOT consent to receive the vaccine)
     ▪ Consent for data collection and for follow-up communication by email.
     ▪ To document administration of COVID-19 vaccines, "consent for data collection" must be selected.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
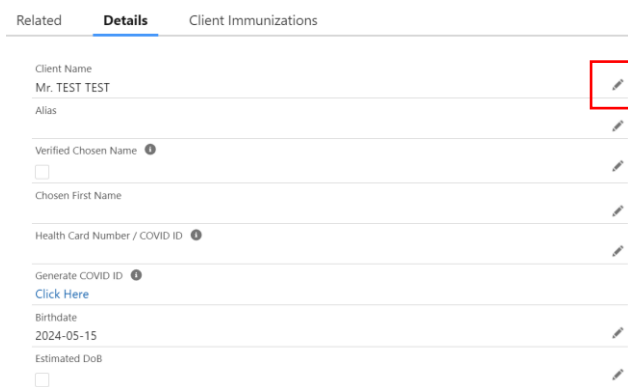51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

3

- To rsend email proof of vaccination following administration, "follow-up communication by email" must be selected.
4. Click on save when you have entered all the client's information.

Updating an existing Client Profile

1. To update an existing Client Profile, click on the "edit" pen beside the information that has changed. It is important to ensure that:
   - o The VE for the site is correct. If the client received their last dose of vaccine elsewhere (i.e. a pharmacy, mass immunization clinic), it will need to be updated to where they are now going to be receiving their vaccine.
   - o Consent for data collection and for follow-up communication by email has been selected at the bottom if applicable.
     - To document administration of COVID-19 vaccines, "consent for data collection" must be selected.
     - To send email proof of vaccination following administration, "follow-up communication by email" must be selected.
2. Click on "save" when you have updated all the client's information.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

4

How to review a client's COVID-19 vaccine history – ALL COVax Users

- Reviewing which COVID-19 vaccines a client has received in the past and when they received them is an important part of pre-vaccination assessment.
- All previous doses of COVID-19 vaccine that a client received in Ontario should appear in COVax.

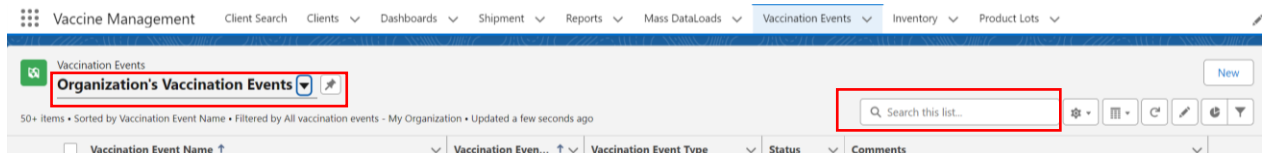1. In the client profile page, click on the "Client Immunizations" tab.

2. Previous doses of COVID-19 vaccine that a client received will be listed here. Check the "status" to ensure they were administered. Doses that were incorrectly documented or have been invalidated for other reasons will have a different "status." Review which vaccines the client received previously and the "days since immunization."

How to activate/inactive COVID-19 Vaccine Event Inventory – <mark>COVax Super Users ONLY</mark>

- Vaccine doses recorded as administered in COVax are taken from the Vaccine Event Inventory (VEI)
- Each VEI is a unique record and represents the vaccine product(s) a site has (or had).
- When a site orders a COVID-19 vaccine product, MLHU creates and allocates this product as a VEI to the site's VE.
- MLHU will set the VEI (vaccine product) to "inactive" when it is shipped. The status of the VEI (vaccine product) must be set to "active" before a dose can be recorded as administered.
  - o The status of VEIs (vaccine products) not being used should be changed to "inactive" to avoid documentation errors.

1. Click on the "Vaccination Events" tab.
2. Type the name of the site's VE into the search field.

3. Click on the appropriate VE from the search results.
4. Once on the VE landing page, scroll down until you see the Vaccine Event Inventory section. Click on "View All."

5. Look for the vaccine product that needs to be made "active" or "inactive'' under "VE Inventory Name" column. The product name and lot number need to match the product that will be used. Once the product has been found, click on the "VE Inventory Name" hyperlink.
6. Once on the VE Inventory page, click on the "edit" pen beside the VEI Status. Update to either "active" or "inactive" and click on "save" when finished.

How to document a COVID-19 vaccine dose as administered – COVax Vaccinators and COVax Super Users

1. From the Client Profile, click on the "New Immunization" button.
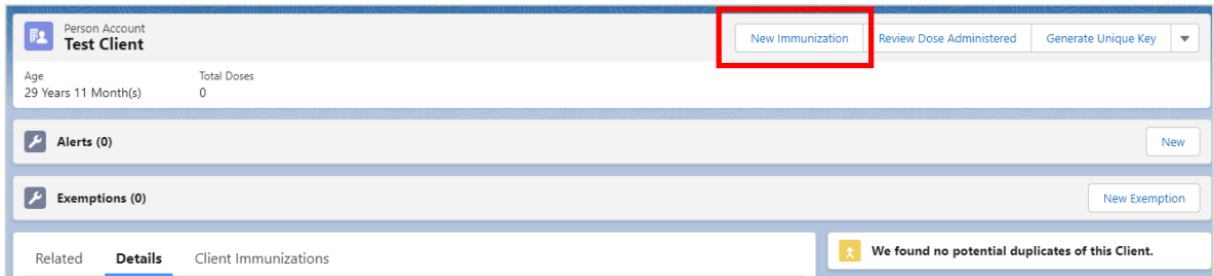
2. From the New Immunization window, select the Administered record type. Click "next."
   - Troubleshooting – If you receive a message stating "Please provide consent" then "consent for data collection has not been checked off on the client's profile page. This will need to be updated before proceeding with documentation of vaccine administration.
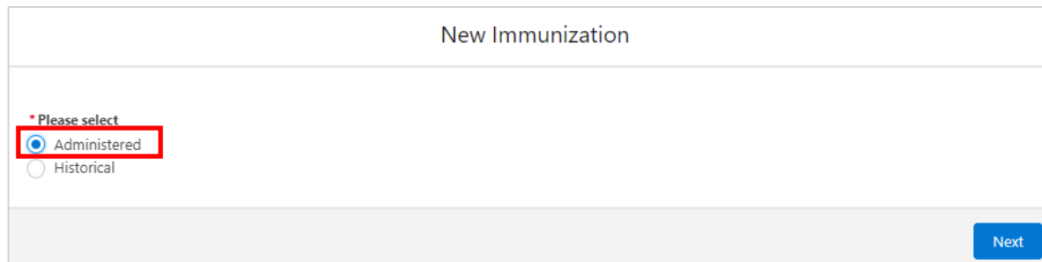
3. Ensure the VE is correct (this is very important!). If the VE is correct, click next. If the VE is incorrect this will need to be updated.
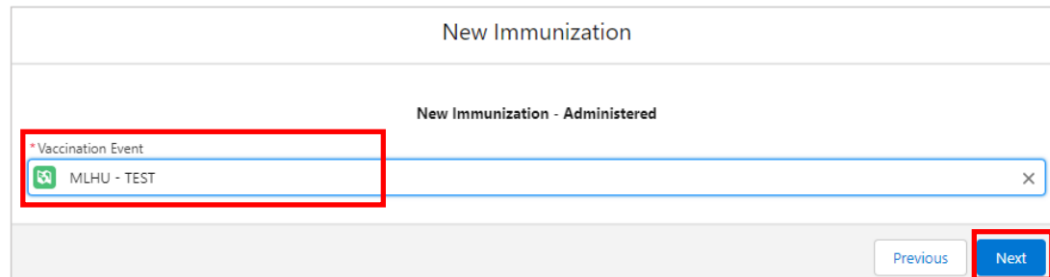
4. Select the correct inventory lot number of the vaccine being administered using the drop-down arrows. Always check that the vaccine type and lot number are correct. Click "next."
   - Troubleshooting – If the lot number is not showing up, the Site Super User needs to check that the vaccine product is active in the VE.

5. Complete the Dose Information page.

www.healthunit.com

- To proceed, the Vaccine Information Sheet will need to be reviewed with the client or proxy. Check off the box when completed.
- If a proxy is consenting on the client's behalf, check off the appropriate box and provide the proxy's information.
- Carefully select the correct site, dosage amount, date, time and administered by information. The route will default to intramuscular.
- Once all fields have been completed, click "finish."

6. Under the client profile page, click on the "Client Immunization" tab to ensure the dose administration was saved.

www.healthunit.com

8

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230
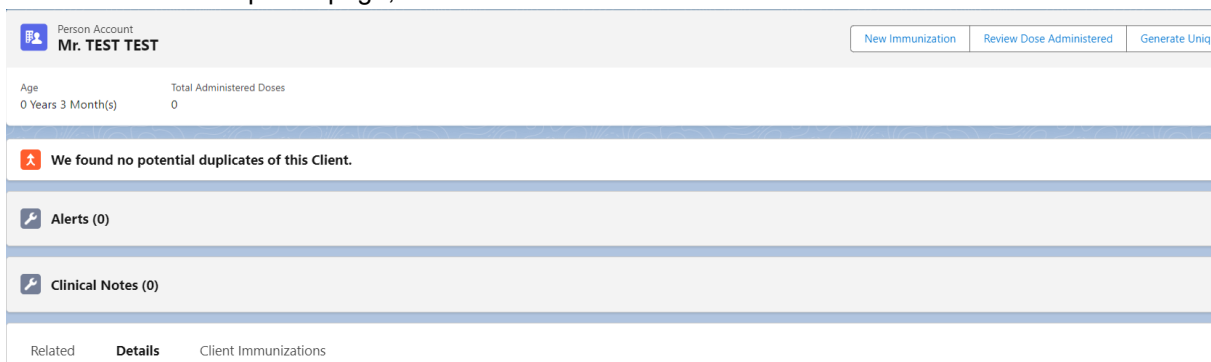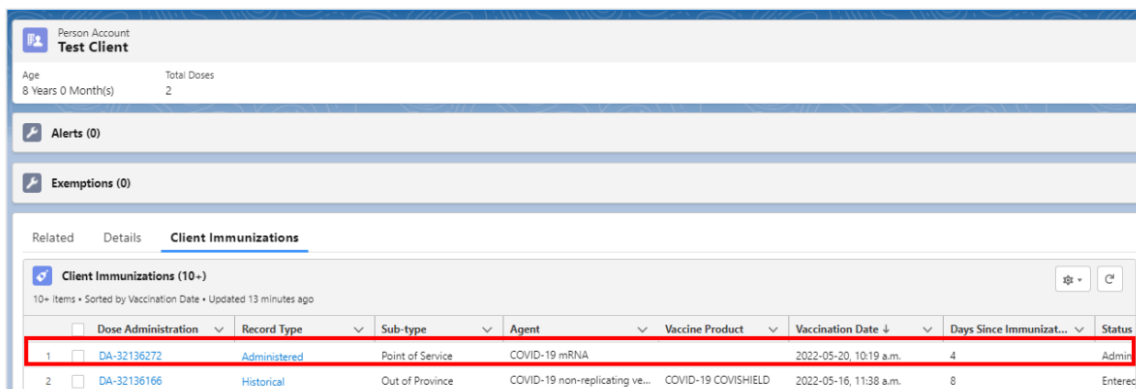
How to generate a receipt for a COVID-19 vaccine dose

- A receipt of a COVID-19 vaccine acts as a record for a client and includes information such as what vaccine they received and the date they received it on.
- Upon documentation of a COVID-19 vaccine in COVax, the client is **automatically emailed a link to download their receipt**.
  - The client's email address must be included on the client's profile page and consent for follow-up communication by email must also be indicated.
- Detailed below are the steps to download a copy of the client's receipt (i.e. to print) or to re-send the client the email to download their receipt.

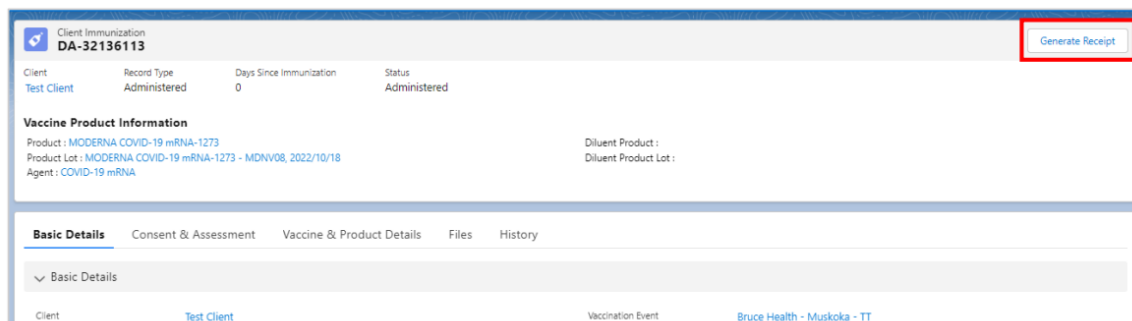1. Under the client profile page, click on the "Client Immunization" tab.

2. From the Client Immunization page, select the immunization that you want to download/re-email the receipt for.
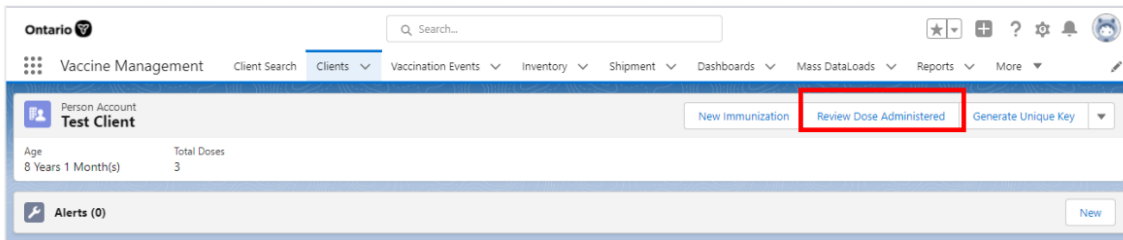

3. From the dose administration record, click Generate Receipt.

4. A new window will open. Check the email receipt option or "click here to view receipt" option.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

9

How to correct a dose documented incorrectly (i.e. incorrect Vaccination Event, incorrect dose, incorrect lot number, etc.) – COVax Super Users ONLY

- When administering vaccines, COVax pulls the vaccines from the vaccine inventory allocated to the site's VE. If the wrong VE is selected for a client, the inventory gets pulled from elsewhere and this creates a ripple effect on potential dose administration and inventory reconciliation issues beyond just the site's VE.
- Similarly, the site's inventory will not be accurate if an incorrect vaccine or dose is documented. The client will also receive the incorrect information on their vaccination receipt.
- Follow the steps below to rectify incorrect dose documentation.

1. Select the "Review Dose Administered" button from the top right corner of the client profile.

2. Carefully select the Dose Administration record that was administered in the incorrect VE. Or was documented with other incorrect details (i.e. incorrect product, incorrect dose).
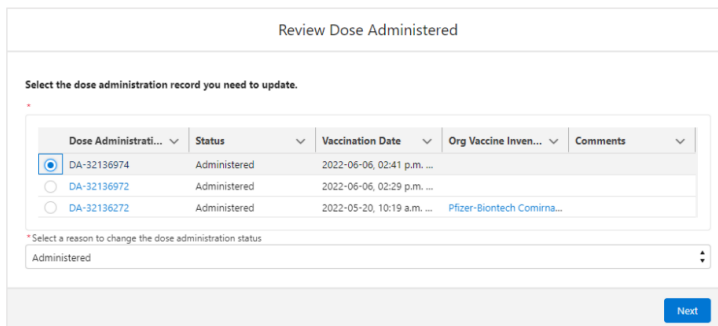
3. Select "Entered in Error" from the drop-down menu.
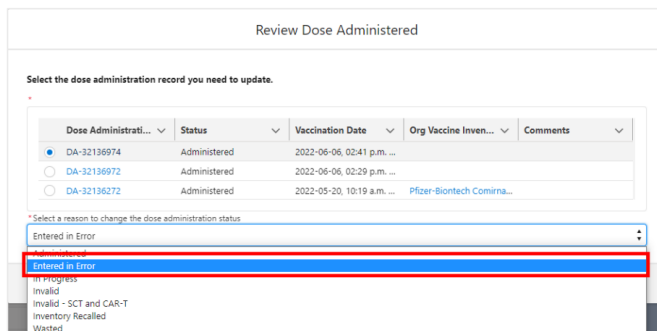
4. Follow the prompts on the screen to finish updating the dose to entered in error.
5. While the client's total dose count will decrease by one, the dose will still appear under the client's vaccination history with the updated status.
6. The dose will now need to be re-entered using the correct details. Follow the steps listed under the *How to document a COVID-19 vaccine as administered* section.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

10

How to record sociodemographic data – COVax Vaccinators and COVax Super Users

- Sociodemographic information will be used for planning purposes to determine how vaccines were distributed and promoted in Ontario.
- Clients must provide consent for their sociodemographic data to be recorded.
- Sociodemographic data only needs to be recorded and completed once. The questions should be asked after the client has received their dose and it has been documented.

1. Under the Client Profile page, click on the "Related" tab.
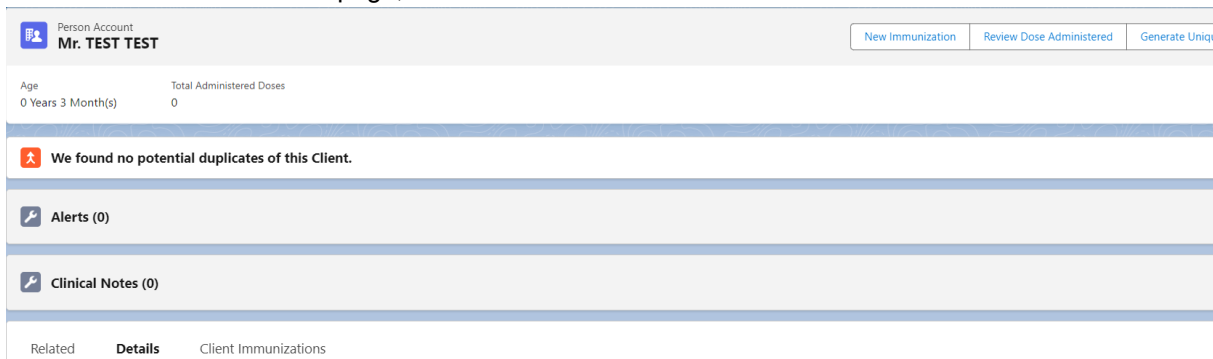
2. Under the "Related" tab, review the Sociodemographic Data section to see if the data has already been collected.
3. If the data has not yet been collected, select "New" to begin the data collection.
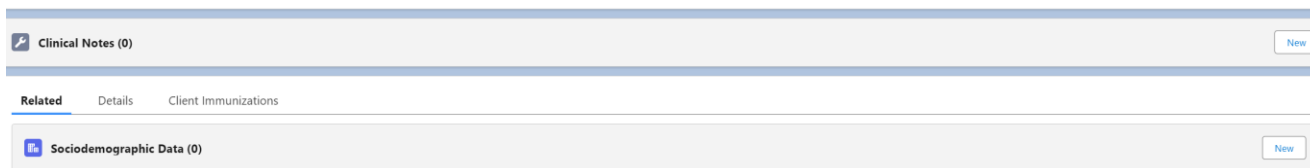
4. Review the sociodemographic consent details with the client. Select "consent to collect sociodemographic data" and proceed to ask the questions if the client chooses to proceed. If the client does not consent, select "declined to provide SES data" and then save and close the survey.
5. To record a client's answers, select one of the options available from the list and then click the arrow to move it to "chosen." Client responses that do not appear on the list can be typed in the free text box.
    - Important: For client's who identify as Indigenous, this data must be entered on the Client Profile page
6. Save all responses when complete.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

11

How to reconcile the Vaccine Event Inventory

- Reconciling the VEI involves ensuring that the use of COVID-19 is appropriately documented for accurate inventory management.

Ensuring all vaccine doses administered and entered correctly

- Failure to document vaccine doses as administered in COVax not only results in inventory discrepancies, but also means clients will be unable to obtain proof that they received a vaccine

1. Click on the "Vaccination Events" tab.
2. Type the name of the site's VE into the search field.
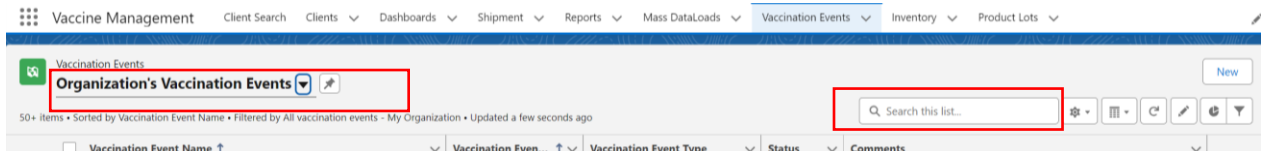
3. Click on the appropriate VE from the search results.
4. Once on the VE landing page, scroll down until you see the Report Links section. Click on "Showing Clients for Vaccination Event."
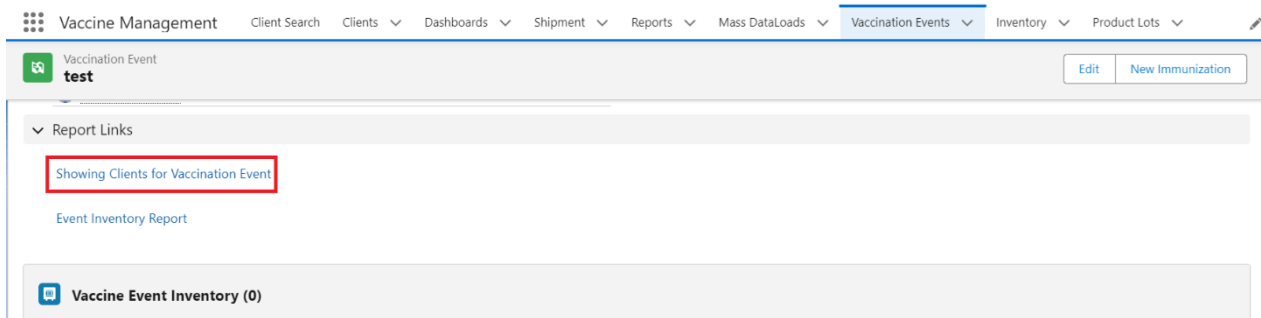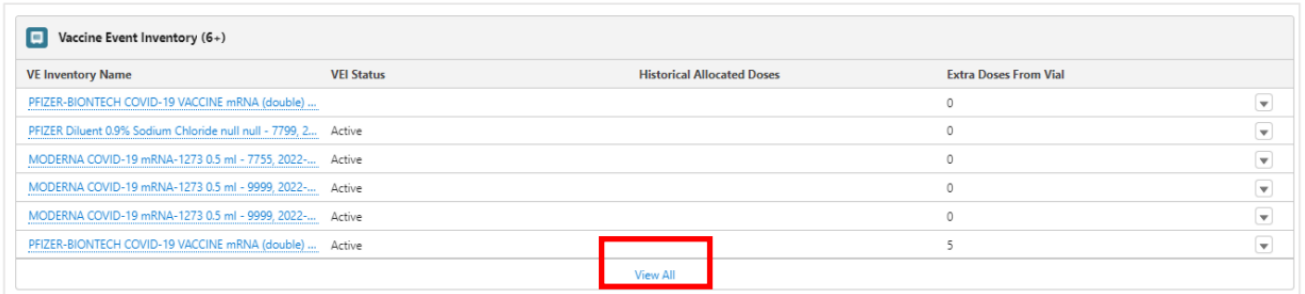

5. In the report, click on the filter icon [filter icon] in the top right-hand corner.
6. Select the "Vaccination Date" and edit the "Range" to "custom". From here, use the calendar icons to select the start and end date for the date of the clinic. Select "Apply." Use the resulting list to ensure the following:
   - Scroll to the bottom of the report to see the total doses administered. If clients who were vaccinated at the clinic are missing, their dose may not have been documented or save, or their dose may have been administered under the wrong VE
     - Review the report to determine which client(s) are not appearing on the list. View the client(s) profile(s) to investigate whether the dose was not documented or if it was documented under the wrong VE. Correct any doses that are documented under a wrong VE.

Recording vaccine wastage and extra doses

- If wastage or extra doses are not recorded in COVax, the VEI will reflect that vaccine supply is greater or less than reality.
- Wastage and extra doses can be recorded as it happens or at the end of each day.
- Examples of wastage (and reasons for wastage) include:
  - Not all doses were used out of the vial - (Doses remaining in a multi-dose vial)
  - Not all doses that were drawn-up were used (Unused pre-drawn syringe)
  - Client moved during vaccine administration and dose was wasted (Vaccine administration issue)
  - Vaccine stored in fridge beyond fridge expiry time (Fridge stable (2 – 8 degrees C) vaccine vial refrigerated beyond use time)
  - Vaccine expired (Vaccine stored in fridge temperatures beyond expiry date)
- If more doses are drawn than the expected number of doses for a multi-dose vial, extra doses need to be recorded in COVax. Additionally, in the rare circumstance that a client does not consent to data collection (dose cannot be recorded in COVax), a dose needs to be entered as an extra dose.

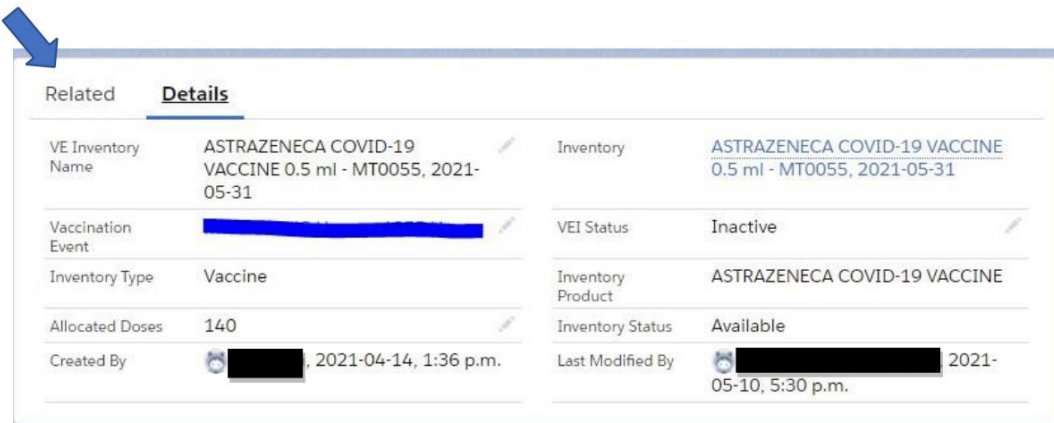1. Once on the VE landing page, scroll down until you see the Vaccine Event Inventory section. Click on "View All."

2. Look for the vaccine product that needs to have doses recorded as wasted or extra. Click on that vaccine hyperlink to view the details.
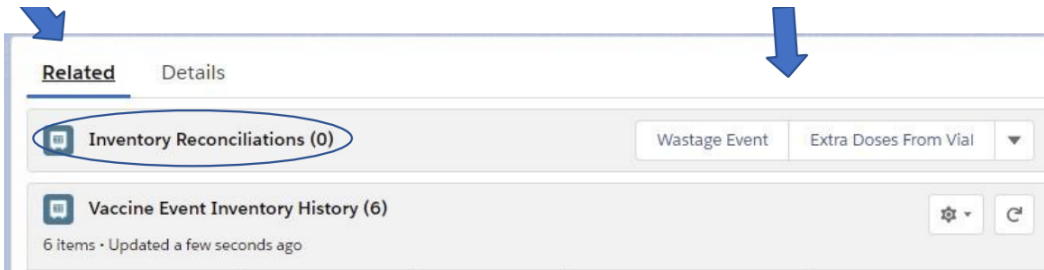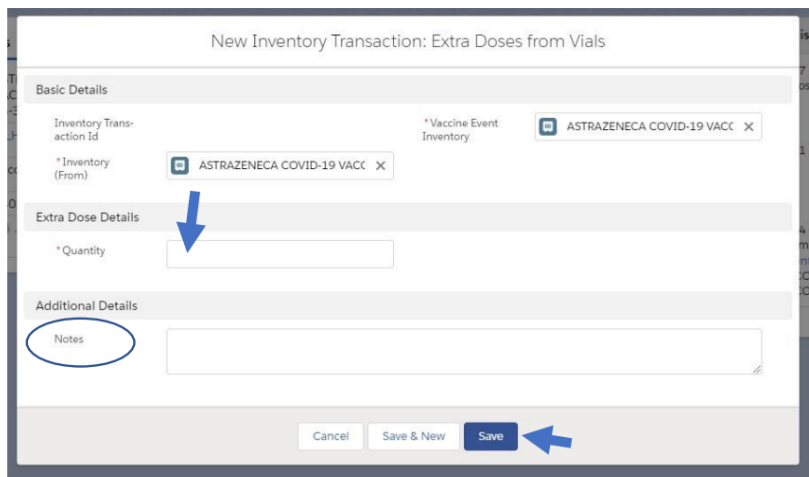3. On the VEI page, click on the "Related" tab

4. Select "Wastage Event" or "Extra Doses From Vial" from the Inventory Reconciliations section.
5. Proceed to step 5 for entering wastage or step 7 for entering extra doses.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

13

6. The following information is required when entering a wastage event. Once all information has been entered, select save. If there were multiple quantities wasted for the same reason (wastage event), these can be entered under one wastage event. For example, if there was 2 vials that should have had 10 doses/vial but only 9 doses was able to be drawn from each, enter 1 wastage event under the reason 'WR-DR-Insufficient Dose(s) From, a Single/Multi-Dose Vial' for a quantity of 2 doses. However if there was insufficient doses and a no show, two wastage events need to be entered because there are two reasons for wastage - 'WR-DR-Insufficient Dose(s) From, a Single/Multi-Dose Vial' and 'WR-UN-Unused Pre-Drawn Syringe.'
   - Start date occurred – select the date and time the wastage occurred
   - Quantity – enter the number of doses wasted. **Half dose wastages (i.e. Moderna) should be entered as 0.5.** For example, if 9 half doses of Moderna are wasted, enter 4.5 doses wasted.
   - Notes – input any desired notes.

   If there were multiple quantities wasted for the same reason (wastage event), these can be entered under one wastage event. For example, if there was 2 vials that should have had 10 doses/vial but only 9 doses was able to be drawn from each, enter 1 wastage event under the reason 'WR-DR-Insufficient Dose(s) From, a Single/Multi-Dose Vial' for a quantity of 2 doses. However if there was insufficient doses and a no show, two wastage events need to be entered because there are two reasons for wastage - 'WR-DR-Insufficient Dose(s) From, a Single/Multi-Dose Vial' and 'WR-UN-Unused Pre-Drawn Syringe.'

7. The following information is required when entering extra doses from vials.
   - Quantity – enter number of doses wasted
   - Notes – input any desired notes.

www.healthunit.com

London Office
110-355 Wellington St. | London, ON | N6A 3N7
tel: (519) 663-5317   fax: (519) 663-9581

Strathroy Office
51 Front St. E | Strathroy, ON | N7G 1Y5
tel: (519) 245-3230

14

Ensuring all vaccine doses administered and entered correctly
1. Complete the on-site physical inventory count (hand count) and record it on the draft checklist provided in the Hand Count Survey email.
2. Once on the VE landing page in COVax, scroll down until you see the Report Links section. Click on "Event Inventory Report."
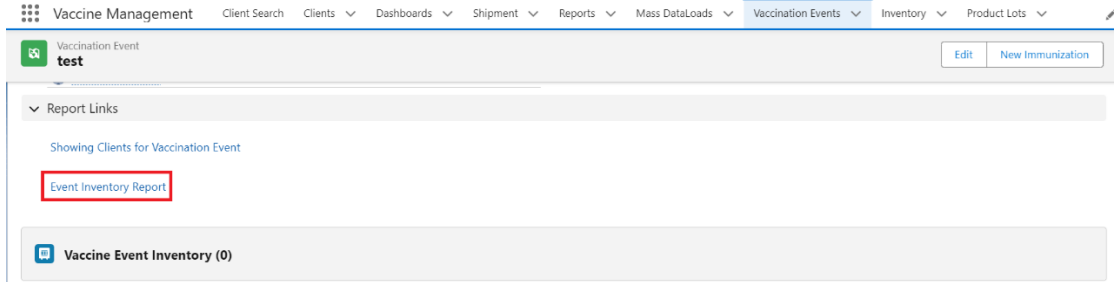
3. The number listed below 'Total Remaining Doses' is the site's inventory recorded in COVax. Compare this to the number obtained during the physician inventory count (hand count).

4. If there are any discrepancies between the total number of remaining doses in COVax and the physical inventory count, please review How to correct a dose documented incorrectly and make any necessary corrections.
5. Once discrepancies have been addressed, proceed with submitting the Hand Count Survey.