CANImmunize

Immunizer Training Manual

Nova Scotia Clinic Flow Immunizer Training

INTRODUCTION

What is Clinic Flow?

CANImmunize Clinic Flow is a software solution which gives organizations end-to-end immunization clinic management capacity. Clinic Flow consists of two main parts:

1. Public-facing Website

The public facing website is where Clients can book appointments, complete COVID-19 screening, and provide digital consent for immunization prior to their appointment.

The client has the ability to fill out forms before the time of the appointment. These forms include:
- Covid-19 Screening Form
- Health Status Form
- Consent Form

2. Clinic Mode

Clinic Mode is a functionality accessed through the CANImmunize smartphone and tablet application. Clinic Mode is designed to document vaccinations and manage clinical workflows. Once a vaccination is administered, Clients can receive a digital immunization receipt (requires a health card and email address).

There are two user account types in Clinic Mode:
1. <u>Greeter Mode:</u> Greeters are able to check-in clients, review demographic information, and complete COVID-19 screening forms.
2. <u>Immunizer Mode:</u> Immunizers are able to review and edit forms (COVID-19 screening and immunization consent) completed as part of the online booking process and document that a vaccine was given.

Key Terms

<u>Organization:</u> The facility running a Clinic.
<u>Clinic</u>: The Organization and location of where a set of vaccines are provided over a specified period of time. (e.g. "Fairview - COVID-19 Dose 1")
<u>Clients</u>: The individual (e.g. health care workers, general public) who has registered to get vaccinated at the Clinic.

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3. End-to-end Immunization Workflow

1. Client books COVID-19 vaccination via the public facing booking page
2. Client arrives at appointment
3. Greeter Checks-in Client (when Greeters are present): Greeter has the ability to review Client's COVID-19 screening
4. Immunizer and Client review Client's demographics
5. Immunizer and Client review and edit when necessary Client's
   a. Health Status form. Immunizer reviews any of the Clients responses which triggered a yellow flag.
   b. Consent form. Immunizer reviews any of the Clients responses which triggered a red flag.
6. Immunizer decides whether to proceed with the vaccination or not based on the Clients Health Status form and consent
7. If a decision to vaccinate was made, the Client is immunized, and the Immunizer logs the immunization in the system
8. If the Client provided their health card number and email address a digital immunization record is sent to the email provided. If a health card number and email address was not provided a paper immunization receipt is given.

NAVIGATING THE CLINIC FLOW APP

1. VERIFY YOUR EMAIL ADDRESS

Before you are able to login to Clinic Flow you will need to verify your account. When your account is created, you will receive an email, similar to the email shown below. Verify your account by pressing "Verify". You will not be able to login unless this is complete.
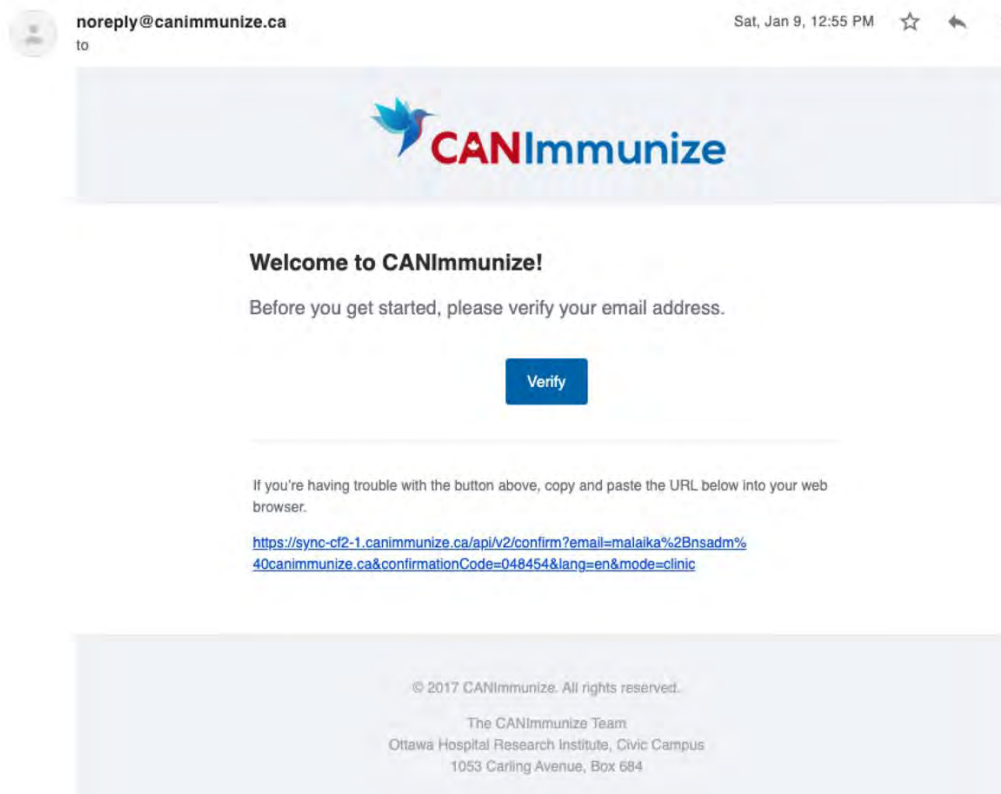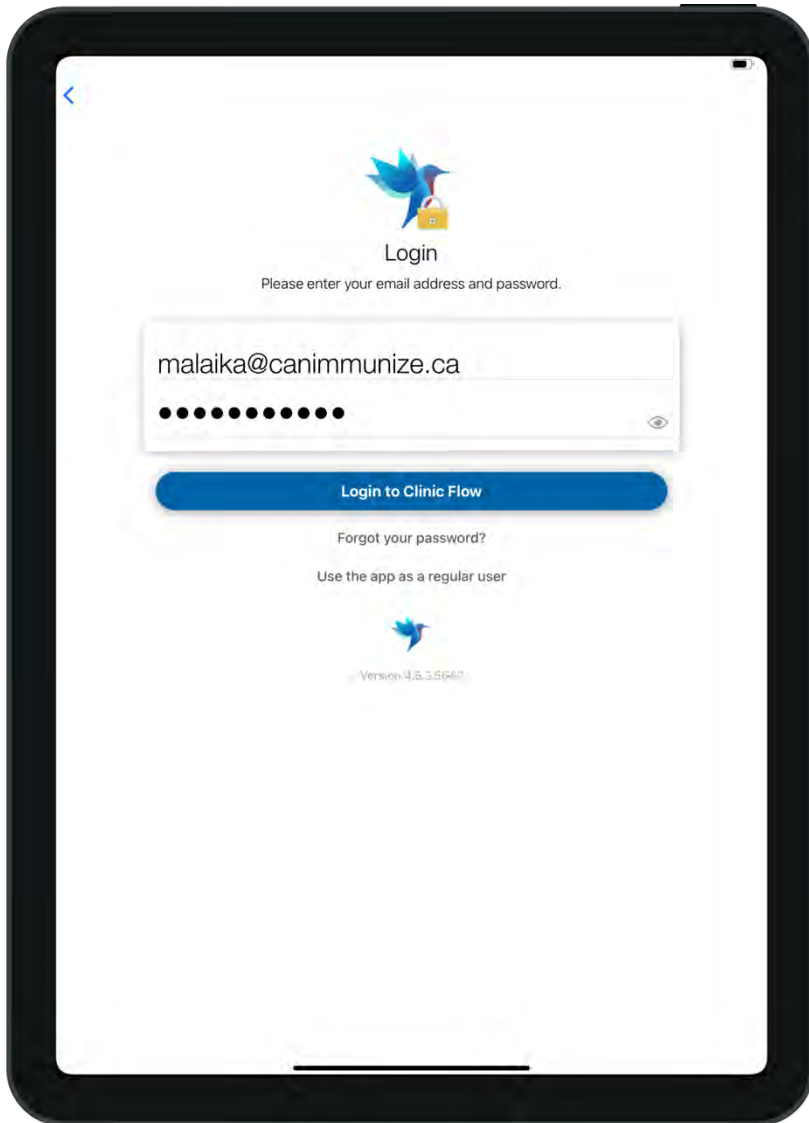
2. LOGIN PROCESS

A. Open the CANImmunize app. On the landing page under "Have an Account? Login" press "Login as a Clinic Flow User"

Verify the app you are using is version **4.5.3.5654**
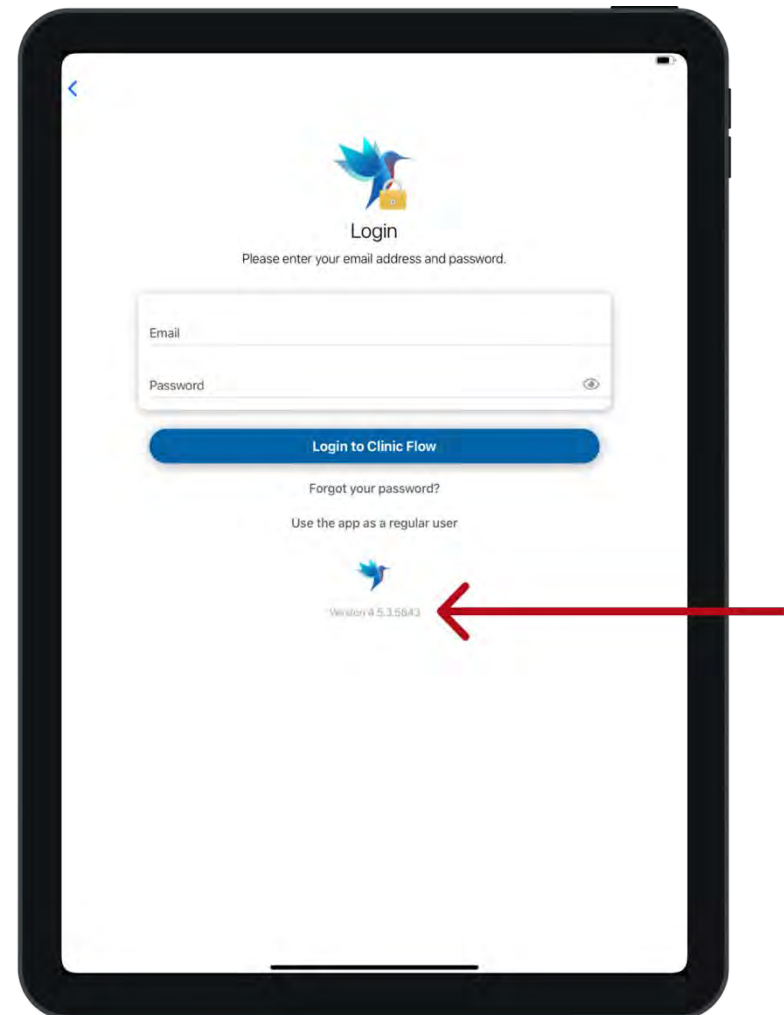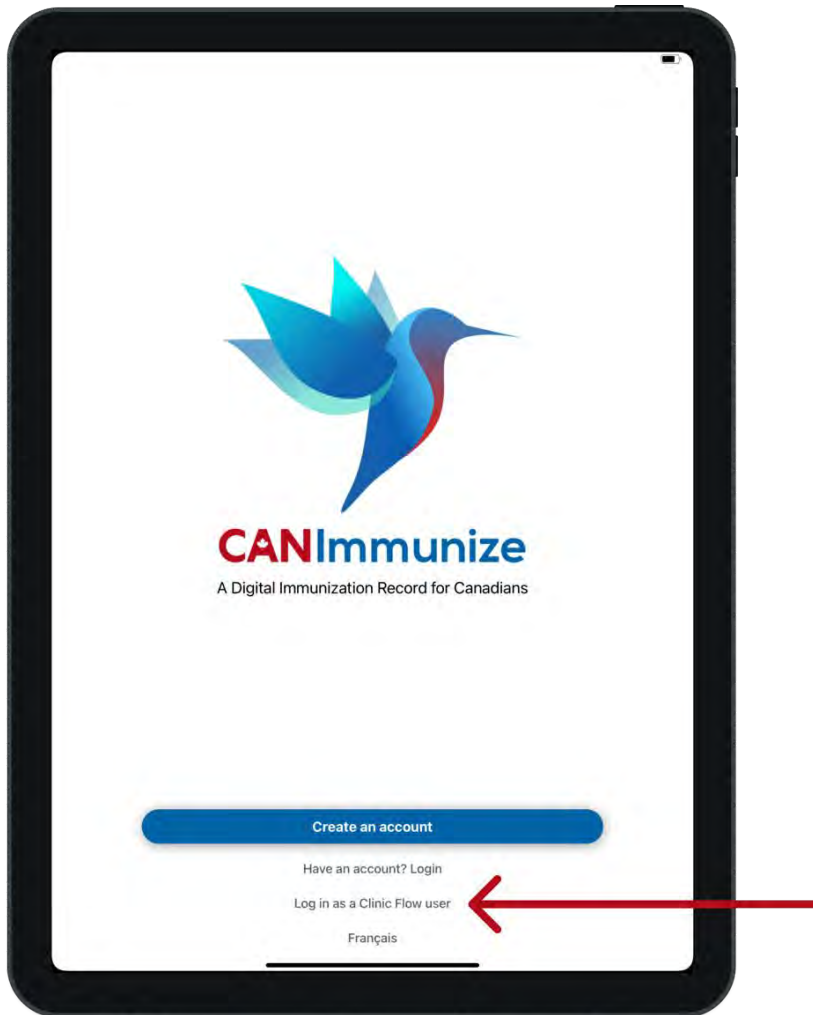
Now enter your verified email and temporary password.
Your temporary password will be provided by your Clinic Lead

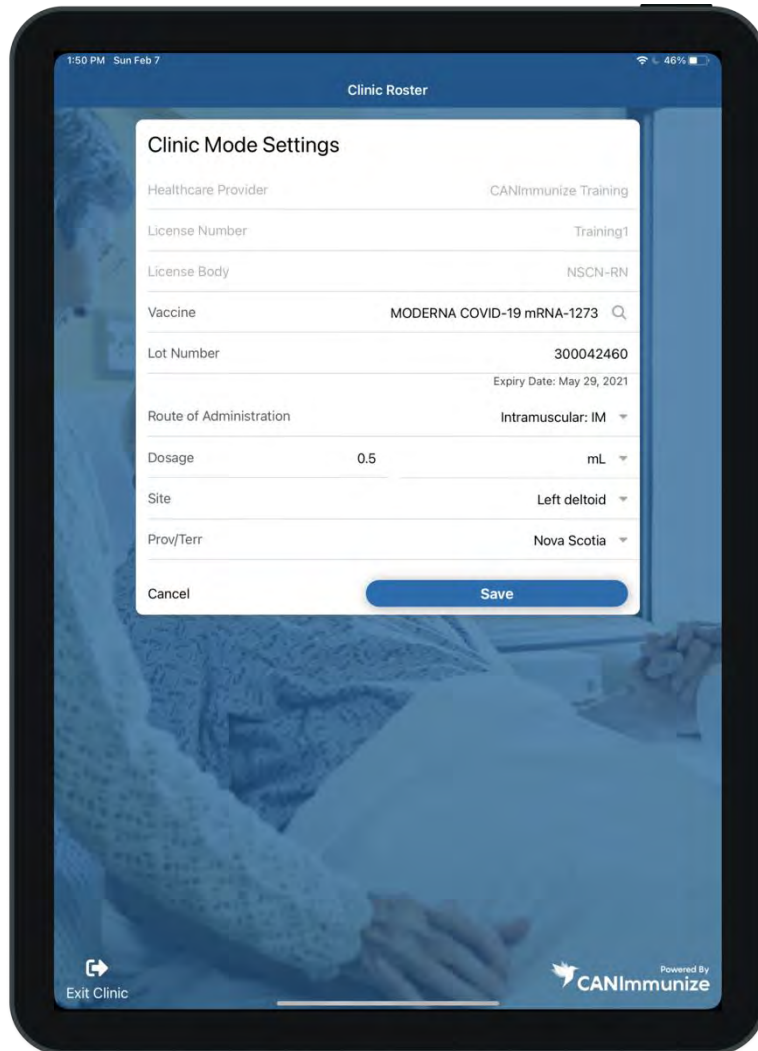## 3. REVIEW THE CLINICS YOU HAVE ACCESS TO

Once you're logged into the app, on the landing page you will see a list of "Clinics". An organization hosts a clinic where a set of vaccines are provided over a specified period of time at a specific location. For example, Fairview Hospital can host a clinic called "Fairview COVID-19 Dose 1 Clinic", which it runs at their North Campus for 4 weeks. Clients book appointments at specific clinics.

Immunizers are linked to Clinics and can see all the Clients who have booked appointments at that clinic.
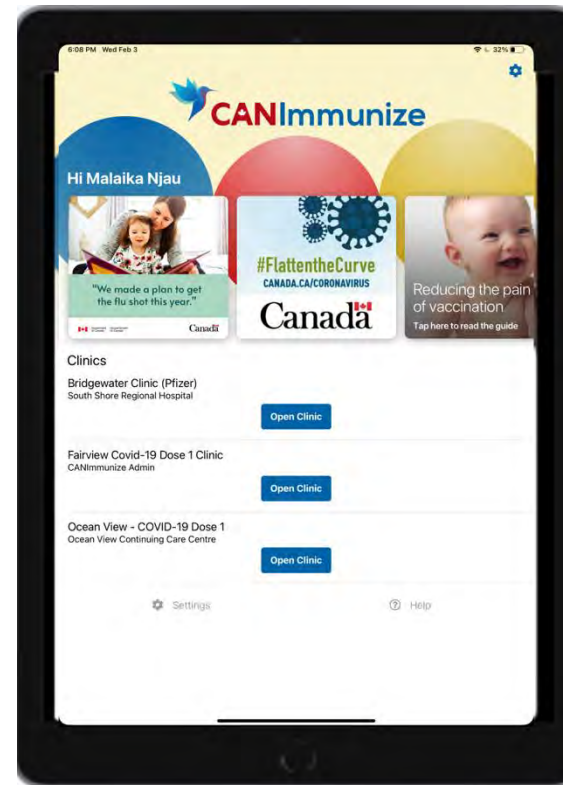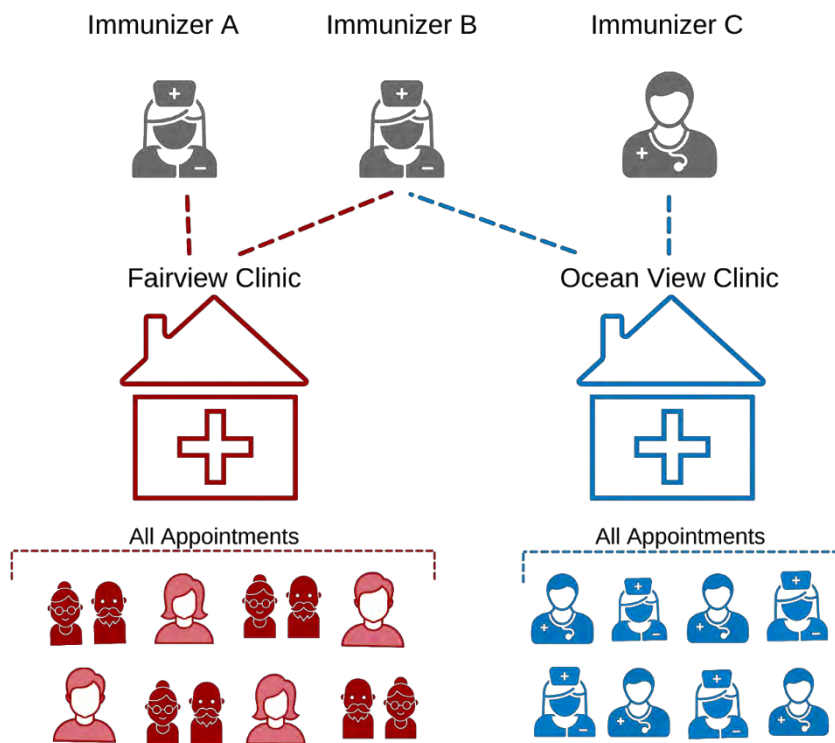
4. CONFIGURE YOUR SETTINGS

Clinic Mode Settings will automatically pop-up upon login when you open a clinic by clicking "Open Clinic". Enter the following information:

<u>Vaccine</u>: search the vaccine brand name from the picklist and select a corresponding Lot Number.

<u>Lot Number</u>: search for the lot number from the picklist. The picklist will only show lot numbers that correspond with the Vaccine you chose. See section below to understand how to entre a lot number not found in the picklist

<u>Route of Administration, Dosage amount and Units:</u> auto-populate based on the vaccine chosen

<u>Site</u>: choose the site of administration from the picklist

Manually Entre a Lot Number

If your Clinic Lead informs you the Lot Number you are vaccinating with is not in the system you will have to enter it manually. If your Clinic Lead does not inform you the Lot Number you are vaccinating with is not in the system double check you have entered the number correctly. Once you have done that inform you Clinic Lead and wait for instructions.
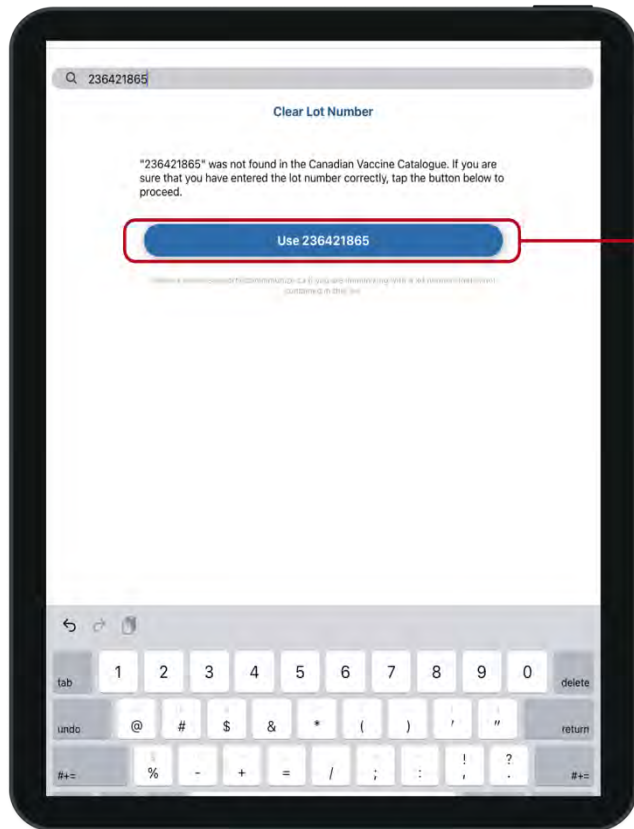
Enter the Lot number your Clinic Lead gave you and press "Use [Lot Number]"

5. CLINIC ROSTER

You will see the Clinic Roster once you open a clinic. The Clinic Roster lists three days of appointments, with the earliest appointments at the top and the latest appointments at the bottom of the page. Clients names are listed: Last Name, First Name, Preferred Name and their age is listed below. You can use the search bar at the top of the page to search for a Client using their first name, last name or preferred name.
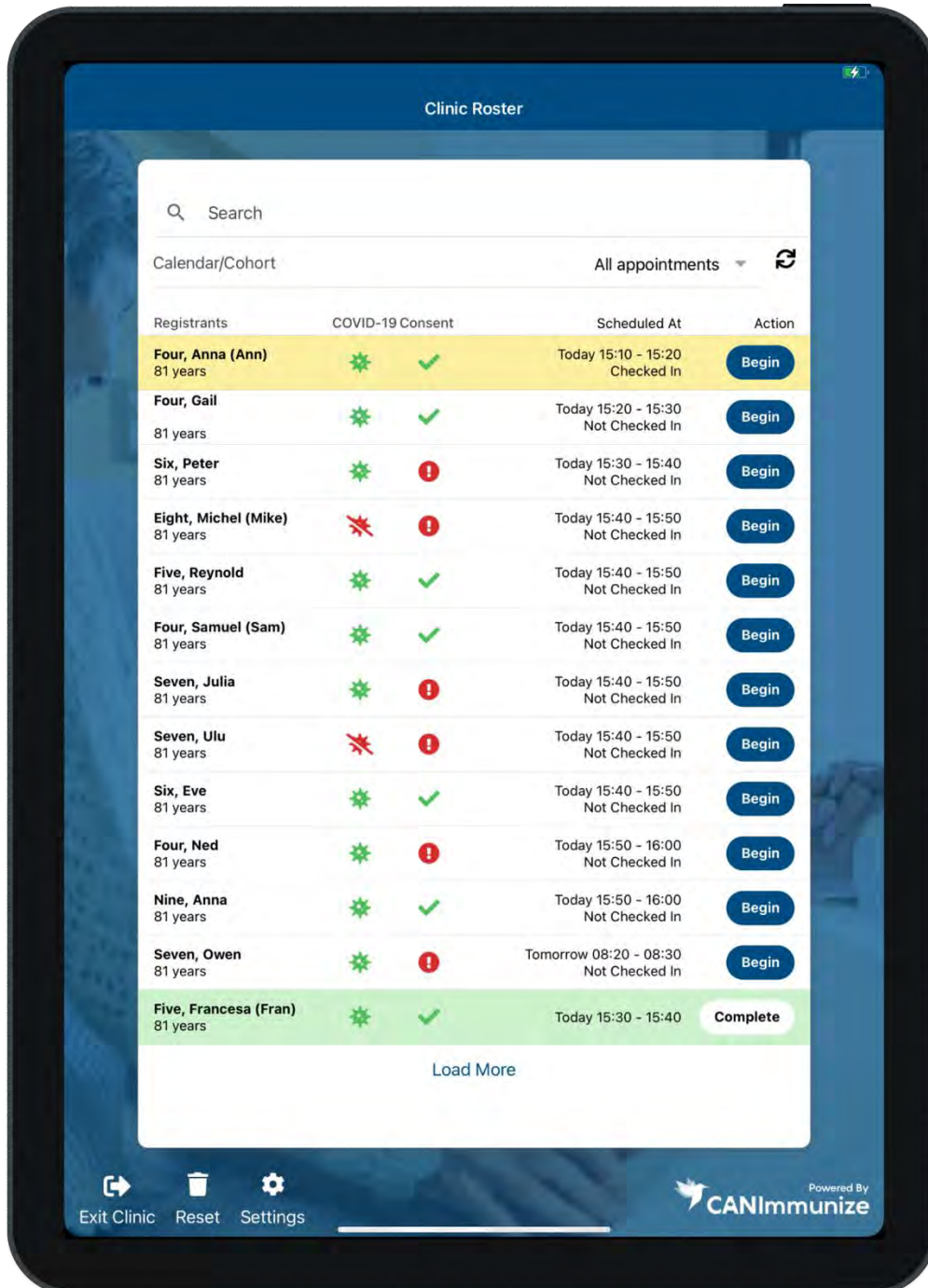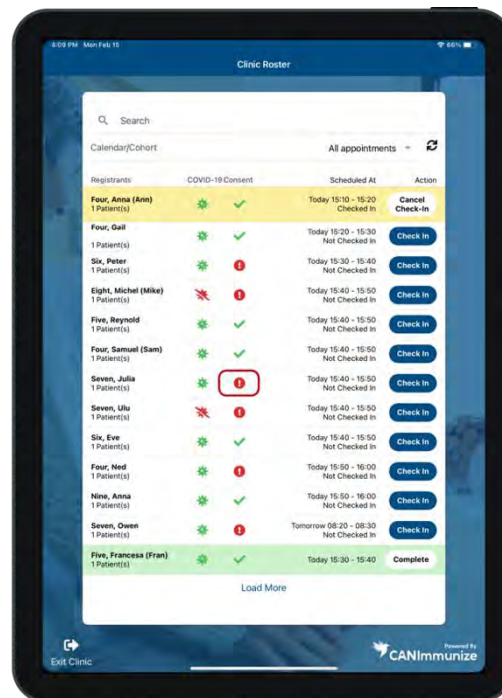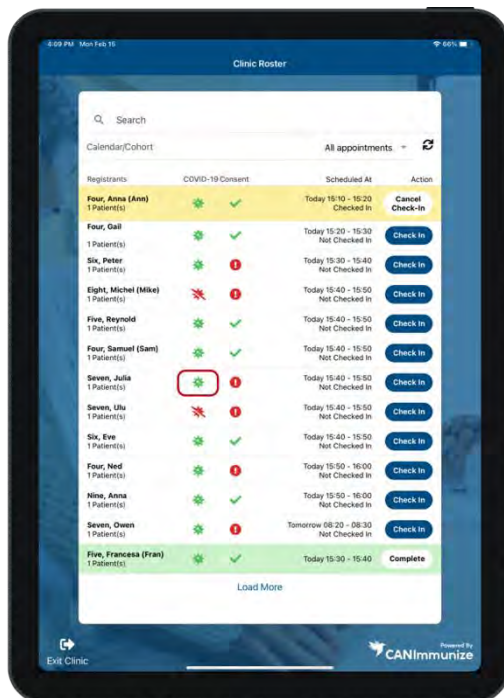
Clinic Roster: Client List Overview

Client appointment time, date and check-in status is shown in the "Scheduled At" column. Clients highlighted in yellow are checked in.

Completed appointments are highlighted in green. An appointment is completed when a client received a vaccine or meets with an Immunizer and decides not to vaccinate. The action button is shown as "Completed".
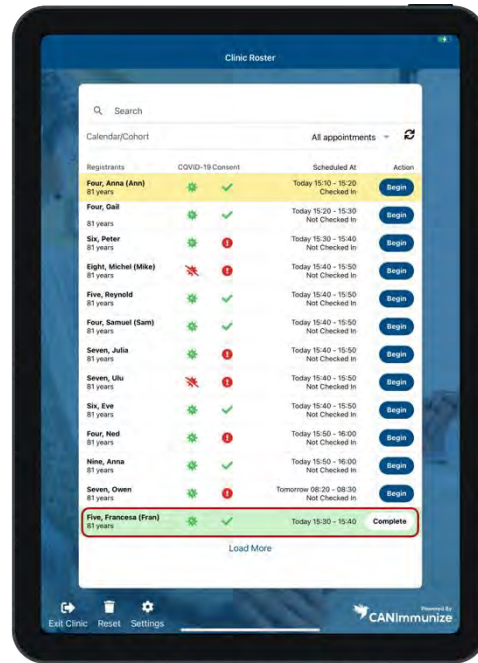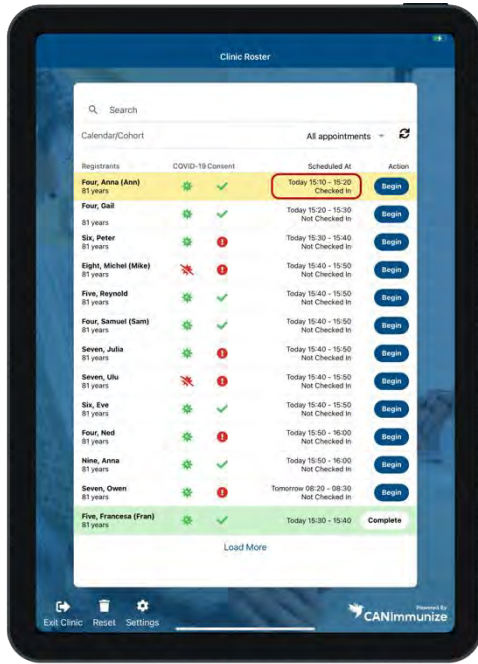
COVID-19 Screening icon appears green if the screening was completed at time of booking, red if not completed


Consent Form icon appears as a red "!" when the consent form and/or the health screening form was not filled out. It appears as a green check mark when all forms were filled out.
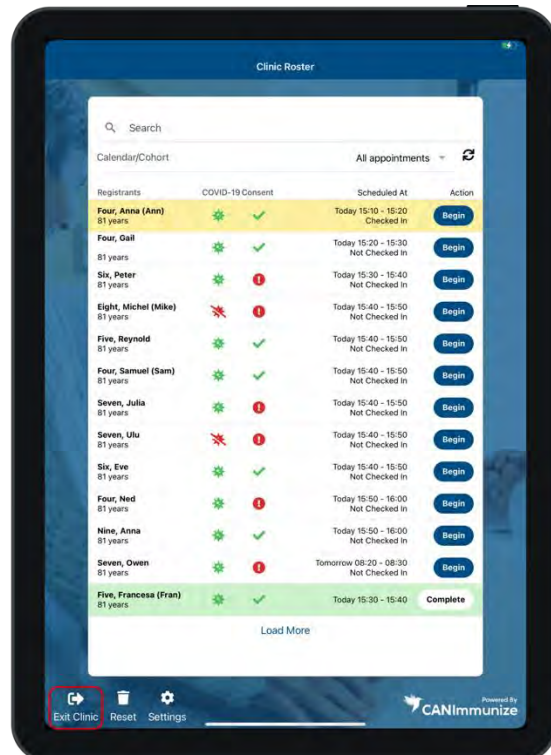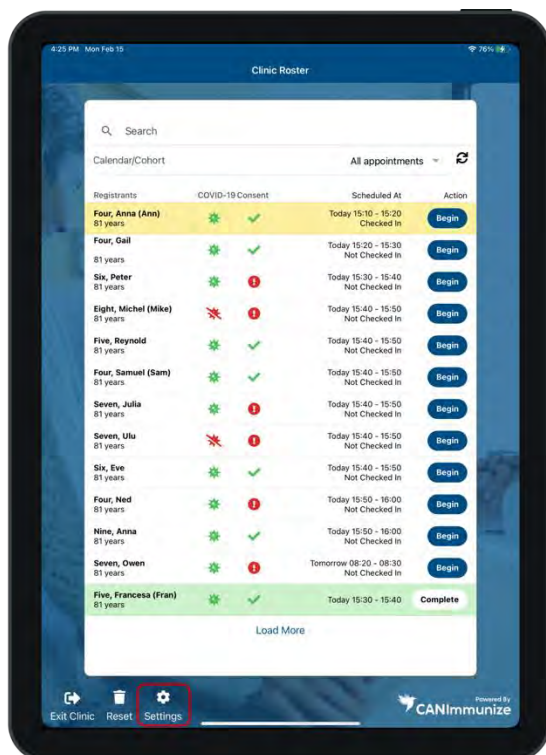
Clinic Roster: Functionality

"All appointments" is the default setting. Press Reset to restore the "All Appointments" view

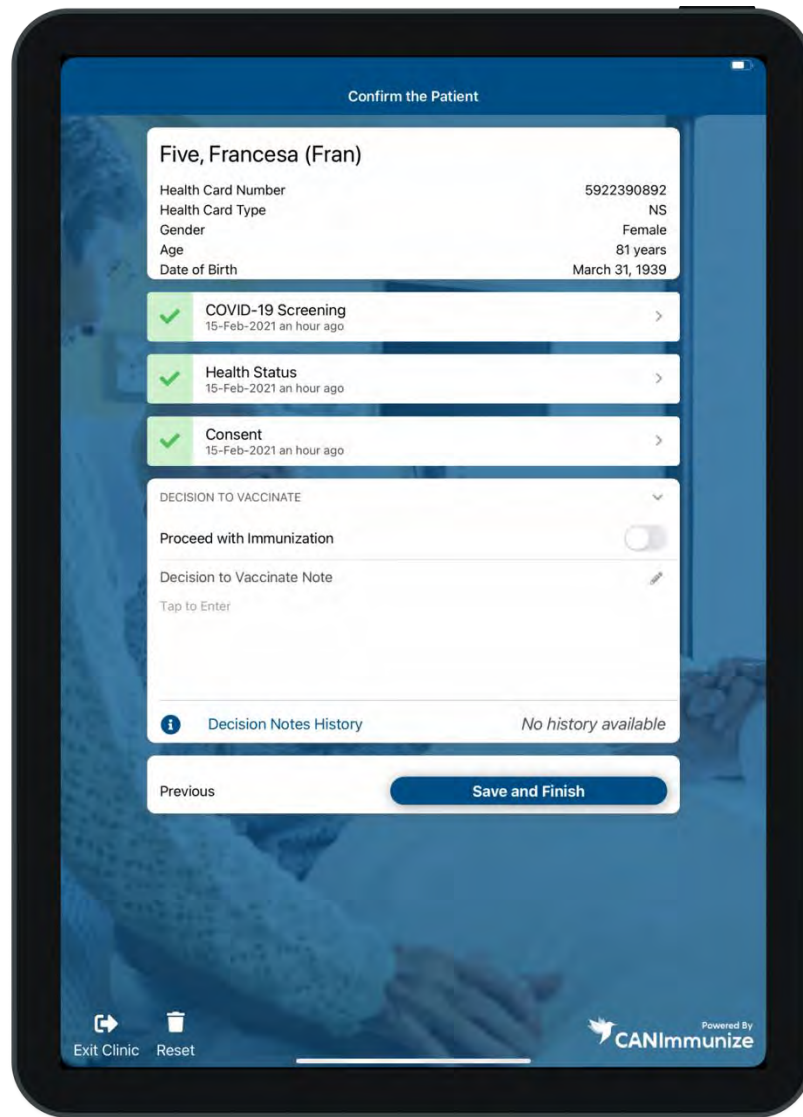Refresh the Client List. The system automatically refreshes the client Roster every minute.
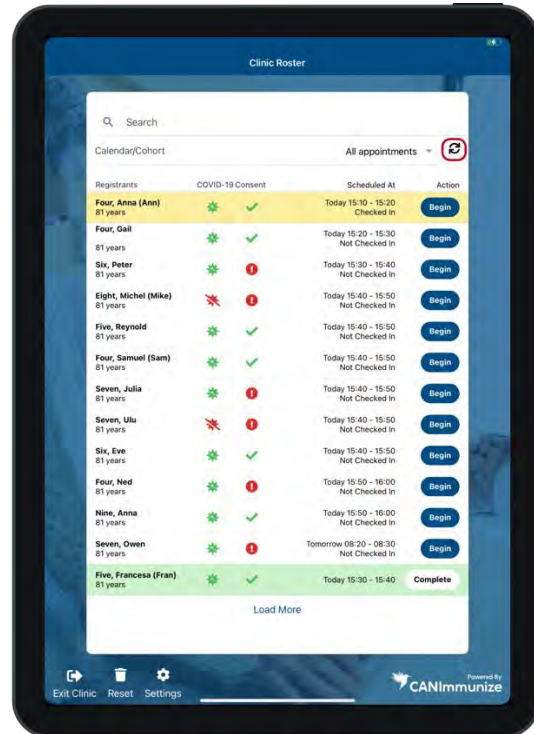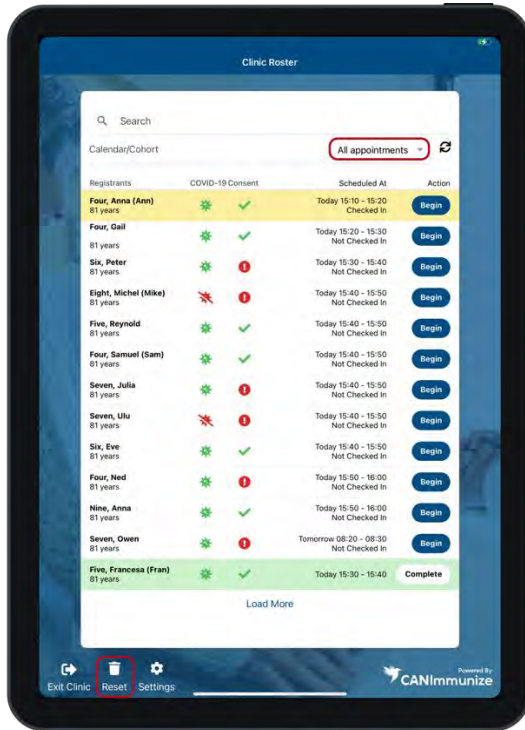
Press "Settings" to access your Clinic Mode Settings

Press "Exit Clinic" to return to the Home Screen

6. REVIEW AND EDIT COVID-19 SCREENING & FORMS

During the appointment booking process clients must provide their name, gender, age, date of birth, Health Card number and type. They are also asked to complete a COVID-19 screening, Health Status form and a virtual Consent Form. Clients booking through 811 are able to book without a Health Card number and will not be asked to provide consent over the phone.

The "Confirm Patient" page details the Client's demographics as well whether the Client completed their COVID-19 Screening, Health Status Form, or Consent Form and when they were completed.

If there are any red or yellow flags attached to a form they will be marked on this page.

What is a yellow flag?

Yellow flags are triggered by Client responses on the Health Status or Consent Form. Yellow flags indicate to the Immunizer the Clients answer may impact their ability to receive the vaccination. A note must be added to the "Decision Notes" field regarding the question(s) which triggered the yellow flag(s).

What is a red flag?

Red flags are triggered by Client responses on the Health Status Form and the Consent form. Immunizers cannot Vaccinate a Client if there are red flags.
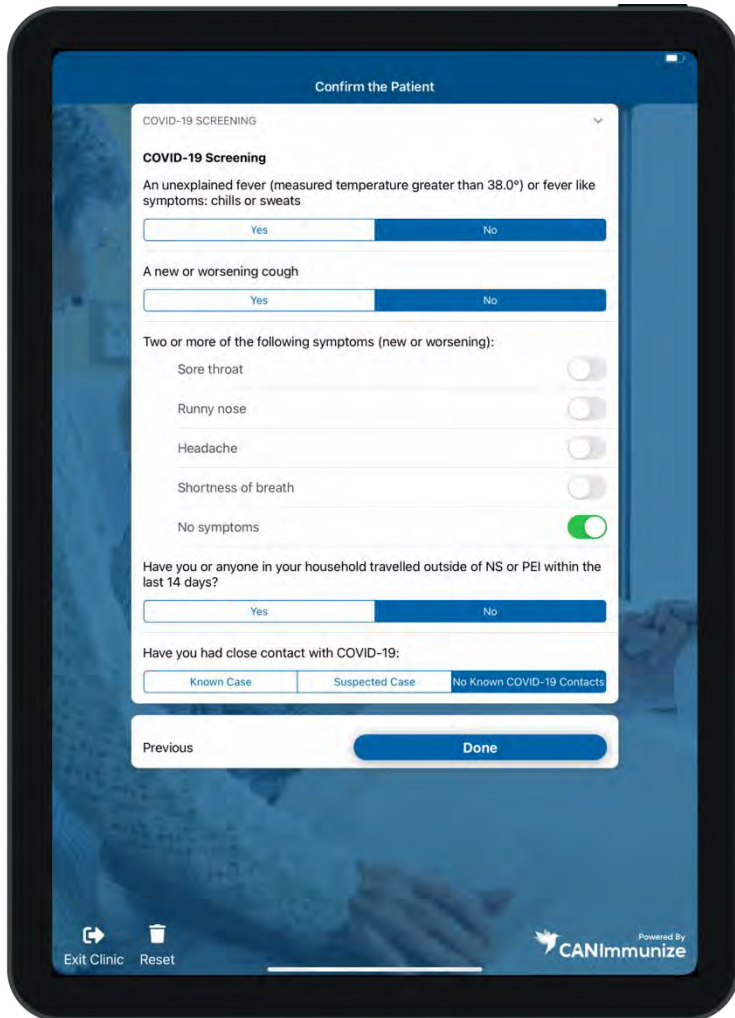
Question	Form	Client Response	Colour of Flag	Immunizer Action
Have you ever suffered an anaphylactic reaction (severe allergic reaction) to a vaccine or another injectable medication?	Health Status	Yes	Yellow	Discuss the issue with Client. If the decision is to proceed with the vaccination, document your decision in the "Decision to Vaccinate" note.
Have you ever experienced anaphylaxis (severe allergic reaction) to polyethylene glycol (PEG)* or any other ingredient in the vaccine?	Health Status	Unsure	Yellow	Discuss the issue with Client, if they are unsure leave the answer as is. If the decision is to proceed with the vaccination, document your decision in the "Decision to Vaccinate" note.
Have you ever experienced anaphylaxis (severe allergic reaction) to polyethylene glycol (PEG)* or any other ingredient in the vaccine?	Health Status	Yes	Red	If the Client is allergic to PEG they are not eligible to receive the vaccination
Are you or could you be pregnant?	Health Status	Yes	Yellow	Discuss effects of the vaccine for pregnant individuals. Do a risk benefit analysis with the Client. If determine to be safe you are able to proceed with vaccination. Document your discussion in the decision to vaccinate note.
Are you breastfeeding?	Health Status	Yes	Yellow	Discuss effects of the vaccine for breastfeeding individuals. Do a risk benefit analysis with the Client. If determined to be safe you are able to proceed with vaccination. Document your discussion in the decision to vaccinate note.

Do you have any problems with your immune system or are you taking any medications that can affect your immune system (i.e. high dose steroids, chemotherapy)?	Health Status	Unsure, Yes	Yellow	Discuss immune system issues with the Client. If the decision is to proceed with the vaccination, document your decision in the "Decision to Vaccinate" note.
Do you have an autoimmune disease?	Health Status	Unsure, Yes	Yellow	Discuss the issue with Client. If the decision is to proceed with the vaccination, document your decision in the "Decision to Vaccinate" note.
Will you be receiving another vaccine (not a COVID-19 vaccine) within 14 days of your appointment? You need to wait for two weeks from the other vaccine to receive your COVID-19 vaccine.	Health Status	Yes	Red	The Client will not be eligible to receive the COVID-19 vaccination if they are schedule to receive another vaccination within 14 days
I consent to receiving the vaccine.	Consent	I have questions to be answered at the clinic	Yellow	Review any questions the Client may have about the vaccine. If the Client's answer is changed to "**yes**" you may vaccinate. If the Client's answer is change to "**no**" you will not have the option to vaccinate.
I consent to receiving the vaccine.	Consent	No	Red	The Client is not eligible to receive the COVID-19 vaccine if they do not consent

Client Demographics

You are be able to view the Clients demographic at the top of the page. It is best practice to confirm this information is correct before moving on. If there are any inconsistencies, please inform your Clinic Lead.

Covid-19 Screening
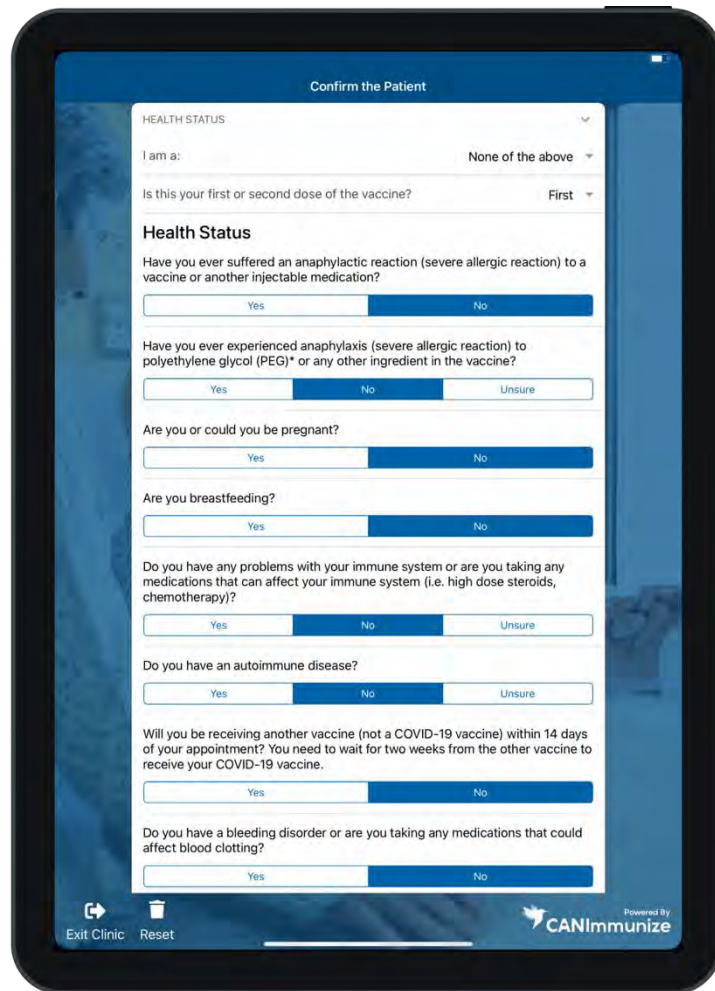
From the "Confirm Patient" page press the "COVID-19 Screening" icon to view the Clients COVID-19 Screening responses. Note that Greeters are able to view and edit Clients COVID-19 Screening. Depending on the workflow at your clinic Greeters may review all Client's COVID-19 Screenings as part of the check-in process. In which case you will not need to review Clients COVID-19 Screening.

Once a Client has booked an appointment, if they complete their COVID-19 Screening and indicate they have been outside of NS or PEI in the last 14 days or have come in contact with COVID-19 their appointment will be canceled.

If edits are made to this form "Done" must be pressed for them to save. If a Client COVID-19 Screening is updated to say they have any of the symptoms outlined or have been outside of NS or PEI in the last 14 days or have come in contact with COVID-19 a red flag will be added to the form and the system will not allow you to vaccinate them.

Health Status Form

The Health Status Form in Clinic Flow was built off the paper forms Immunizers previously used. All field on this form are editable. If edits are made, press "Done" at the bottom of the form to save.

The Client can choose multiple race identities and Indigenous identities. Race/Indigeneity questions are a required field on this form; however, the Client can indicate that they prefer not to answer. Both fields are multi-select. You will receive additional documents you must review in order to ask race/indigeneity questions.

Review each of the questions of the form with the Client. Refer to the table above for details regarding which responses trigger yellow and red flags. If there are any red flags the system will not allow you to vaccinate the Client.

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Left tablet screen

Confirm the Patient

Do you have a bleeding disorder or are you taking any medications that could affect blood clotting?

Yes	No

Have you ever felt faint after a past vaccination or medical procedure?

Yes	No

Do you require assistance at your appointment for reduced mobility?

Yes	No

Demographic Information

As Nova Scotia rolls out our immunization program, we want to ensure that all citizens have access to immunization. Being able to report immunization progress based on race and indigenous subgroups allows us to monitor and ensure equity in access and distribution of immunizations. If gaps exist it allows public health to make changes to the immunization program. Learn more.

The following questions are OPTIONAL and will not impact the services or care you receive.

Please check the following applicable boxes. We know that people of different races do not have significantly different genetics. But our race still has important consequences, including how we are treated by different individuals and institutions. Which race category best describes you?

African Nova Scotian

Black (e.g. African, Afro-Caribbean, African Canadian descent) — ✅

East/South Asian (e.g. Chinese, Korean, Japanese, Taiwanese descent or Filipino, Vietnamese, Cambodian, Thai, Indonesian, other Southeast Asian descent)

Indigenous (e.g. First Nations, Inuk/Inuit, Métis descent) — ✅

Latino (e.g. Latin American, Hispanic descent)

Middle Eastern (e.g. Arab, Persian, West Asian descent – i.e. Afghan, Egyptian, Iranian, Lebanese, Turkish, Kurdish)

South Asian (e.g. South Asian descent – i.e. East Indian, Pakistani, Bangladeshi, Sri Lankan, Indo-Caribbean)

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Right tablet screen

Confirm the Patient

East/South Asian (e.g. Chinese, Korean, Japanese, Taiwanese descent or Filipino, Vietnamese, Cambodian, Thai, Indonesian, other Southeast Asian descent)

Indigenous (e.g. First Nations, Inuk/Inuit, Métis descent) — ✅

Latino (e.g. Latin American, Hispanic descent)

Middle Eastern (e.g. Arab, Persian, West Asian descent – i.e. Afghan, Egyptian, Iranian, Lebanese, Turkish, Kurdish)

South Asian (e.g. South Asian descent – i.e. East Indian, Pakistani, Bangladeshi, Sri Lankan, Indo-Caribbean)

White (e.g. European descent)

Other

Prefer Not to Say

Unknown

Indicate which Indigenous identity

Mi'kmaq

First Nations

Métis (includes member of a Métis Organization or Settlement)

Inuk/Inuit

Prefer not to answer — ✅

Unknown

Do you reside in a First Nations Community (on reserve or Crown Land)

Yes	No	Prefer not to answer	Unknown

Previous	Done
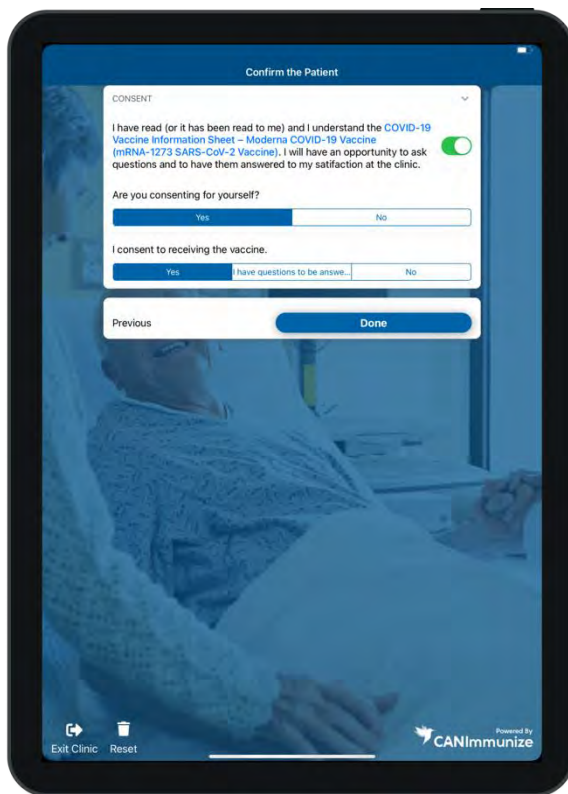
Exit Clinic Reset

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Consent Form
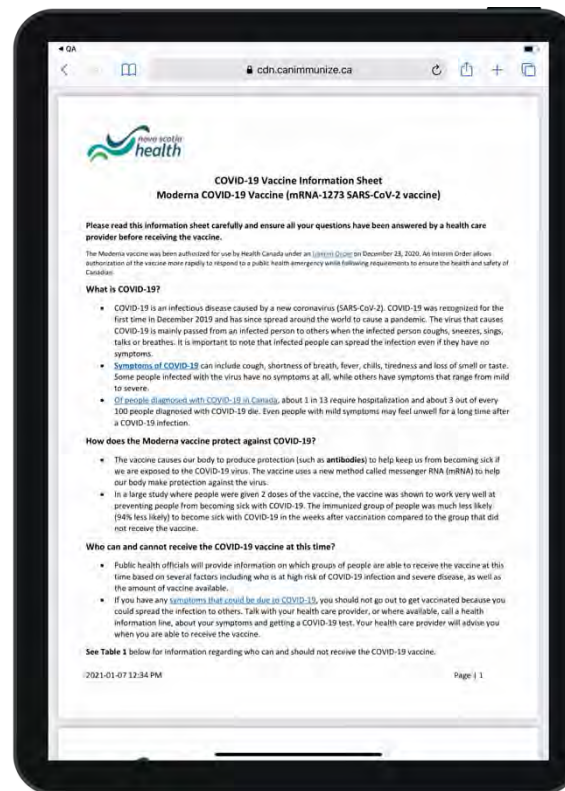
The Consent Form can be completed by the Client or by a parent/legal guarding or substitute decision maker. If the Client has not reviewed the "COVID-19 Vaccination Information Sheet" you can access it by pressing the blue text.

If a Client has questions about the vaccine review their questions and update their consent response to be "Yes" or "No". If the client does not consent a red flag will be added to the form and the system will not let you vaccinate the client. Press "Done" to save any update you've made to this form.
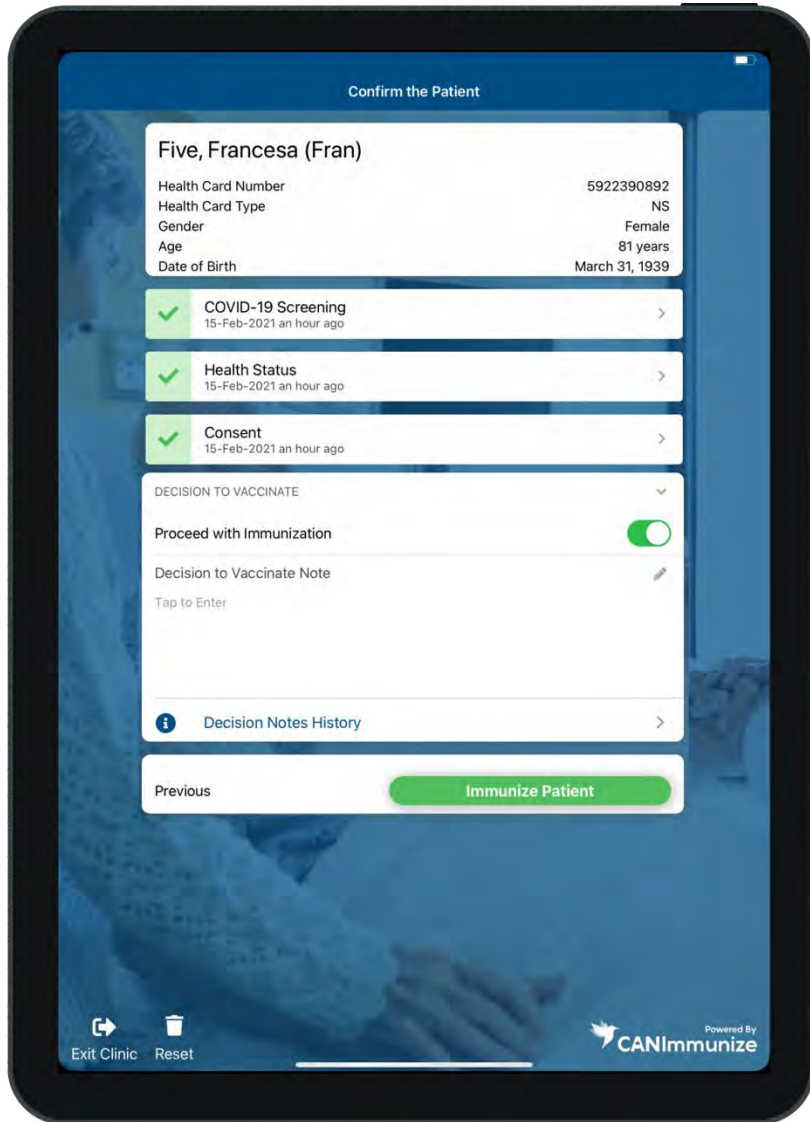
Consent Form	COVID-19 Vaccination Information Sheet

7. DECISION TO VACCINATE

Once you have reviewed and completed (when necessary) the Client's COVID-19 Screening, Health Status Form, and Consent Form you are ready to update the "Proceed with Immunization" toggle and add a Decision to Vaccinate Note if necessary. If you toggle "Proceed with Immunization" on you will then be able to press "Immunize Patient" and move forward in the immunization process.

When to toggle the "Proceed with Immunization" on?
When you and the Client are ready to move forward with the vaccination. You have discussed all yellow flags and red flags and updated the Client's responses. There are no red flags triggered.

When to toggle the "Proceed with Immunization" off?
When you and the Client do not want to move forward with the vaccination i.e., a client's response triggered a red flag.

When to add a Decision to Vaccinate Note?
If you toggled the Proceed with Immunization on and if you addressed a red or yellow flag on the Health Status and/or Consent Form add a note. The note should address the original yellow or red flag and the decision you had with the Client. You do not need to add a note if you did NOT toggle the Proceed with Immunization on.

8. IMMUNIZE A CLIENT

Once you have reviewed and completed (when necessary) the Client's COVID-19 Screening, Health Status Form, and Consent Form and togged on the decision to vaccinate you are ready to vaccinate the Client.

Press "Immunize Patient" to continue.

You will then see your vaccination settings. Ensure these are correct. Pay special attention to the Site as this is the field that is most likely to be edited frequently. Vaccinate the Client. Record the Vaccination in the system by pressing "Confirm Vaccination"
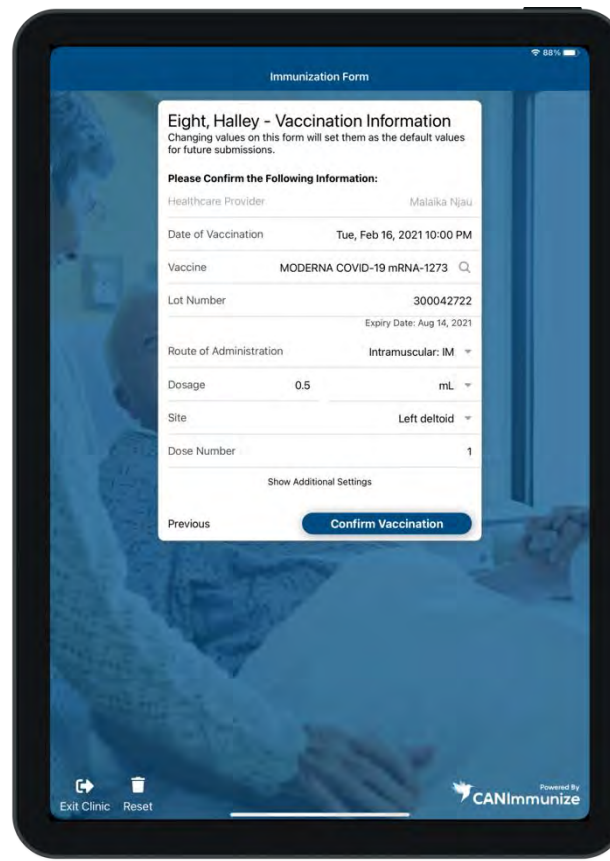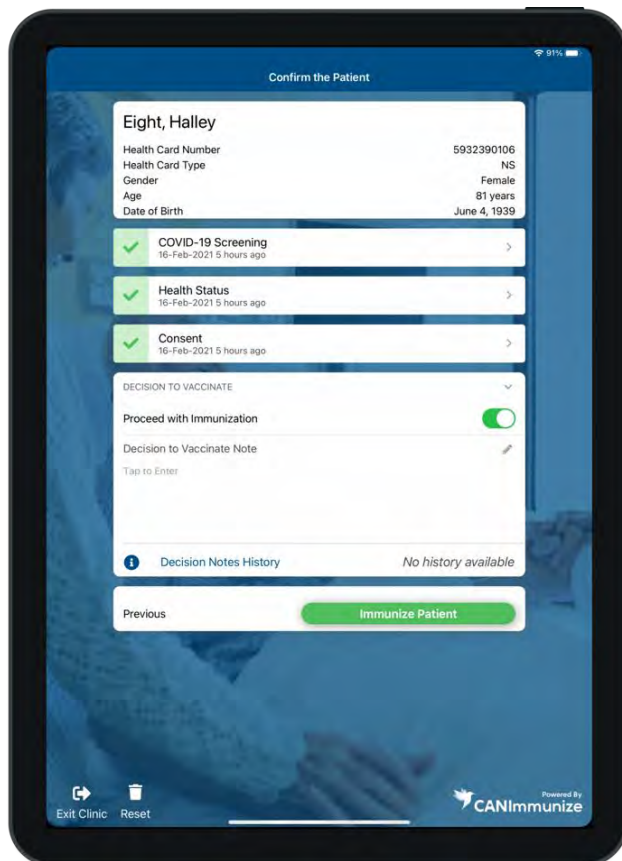
Once the vaccination has been logged you will see the Vaccination Results. This page will tell you whether you need to issue a paper vaccination record, or if the Client received a digital vaccination record. Press "confirm" to view the Client's appointment details and then "Done" to navigate back to the Client Roster. On the Client Roster you will see the Client's name is now highlighted in green, marked as "Complete" and moved to the bottom of the list.
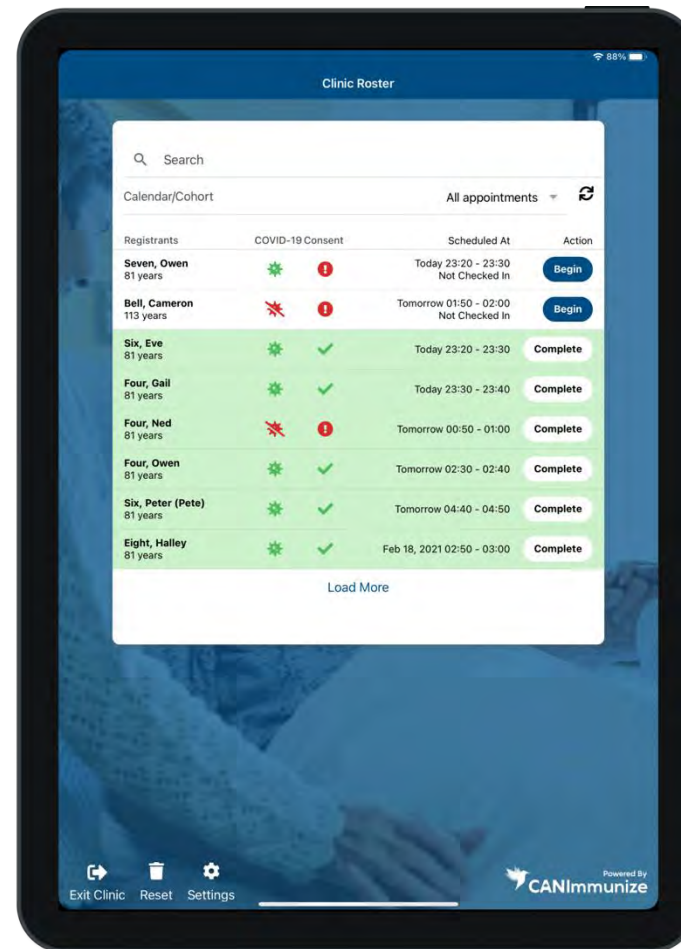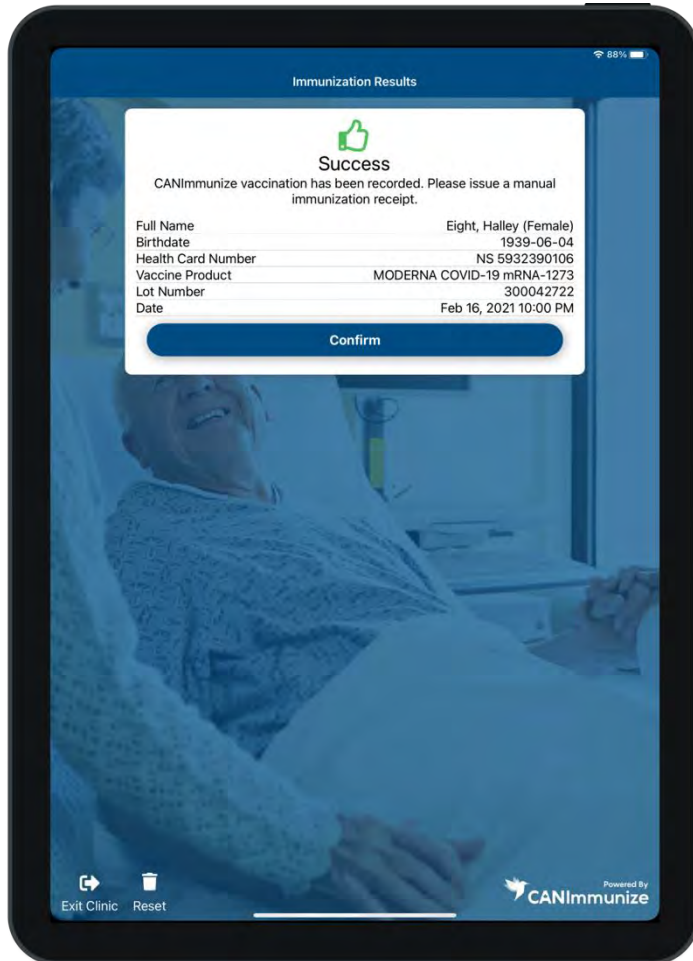
CLIENT SCENARIOS

1. Halley Eight – Review and Vaccinate

Halley filled out all of her forms at the time of appointment booking. The green COVID-19 icon and Green check mark show that Samuel is ready to get vaccinated.

(1) Press Begin to enter a View of the Client's appointment details:
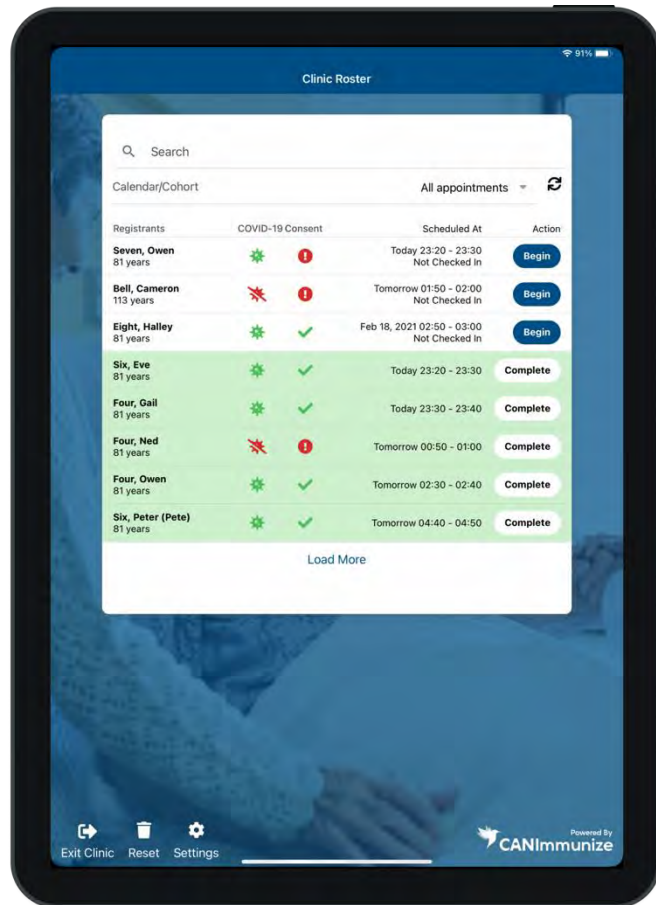
(2)   Next click "Open" to view the next page

(3) This opens to a page where you can confirm Client details: In this view you can see the Client has completed all of their forms and when this was done.
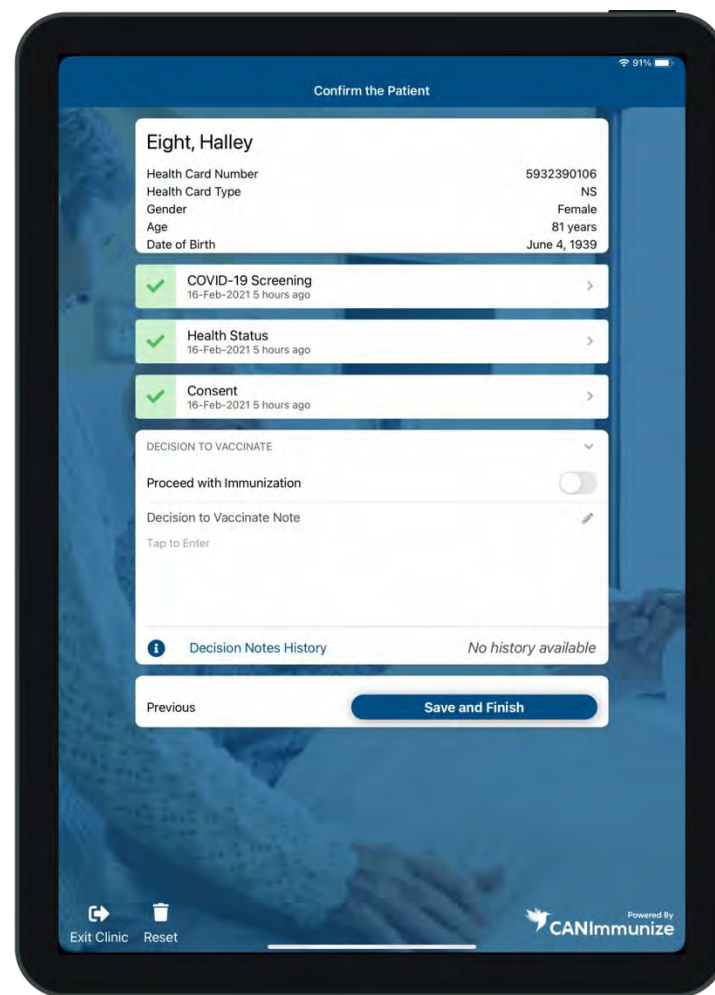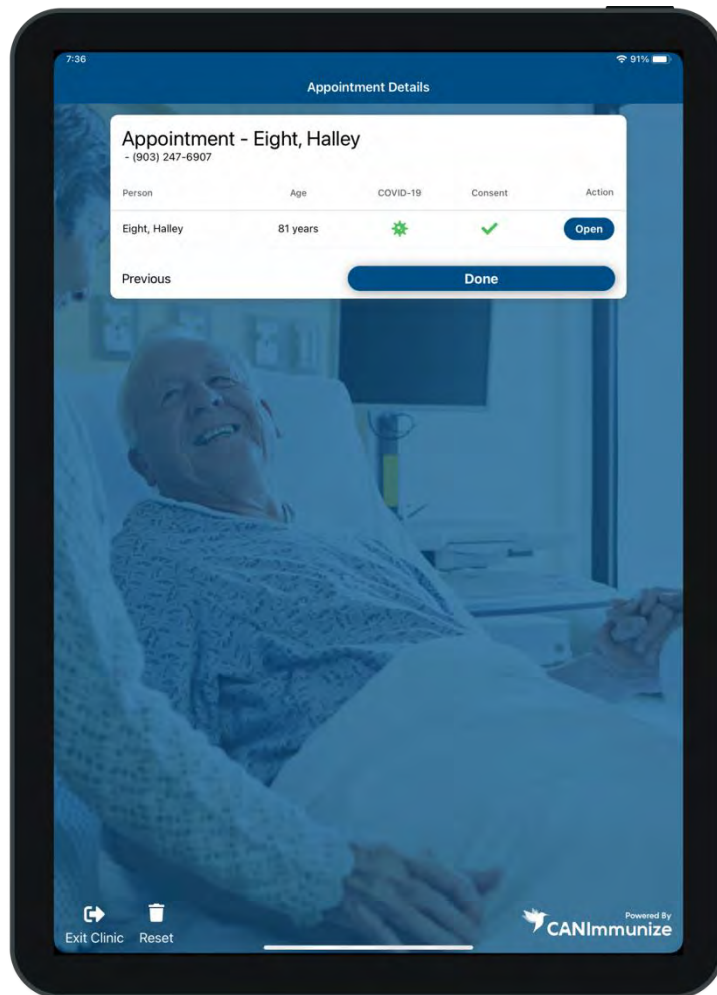
(4) You have the option of clicking into any of the forms should you receive new information from the Client.

(5) Once you've reviewed any information that is necessary you will switch the "Proceed with Immunization" toggle so it turns green as pictured below on the left

(6) Select the green "Immunize Patient" button at the bottom of the screen. This brings you to your vaccination settings, seen below on the right.

(7) Review the Vaccine details and ensure the Lot Number matches the vaccine you have.

(8) Confirm with the client where they would prefer to be vaccinated. Samuel has indicated his left deltoid as his preferred location.

(9) Select Confirm Vaccination once you have completed the administration.
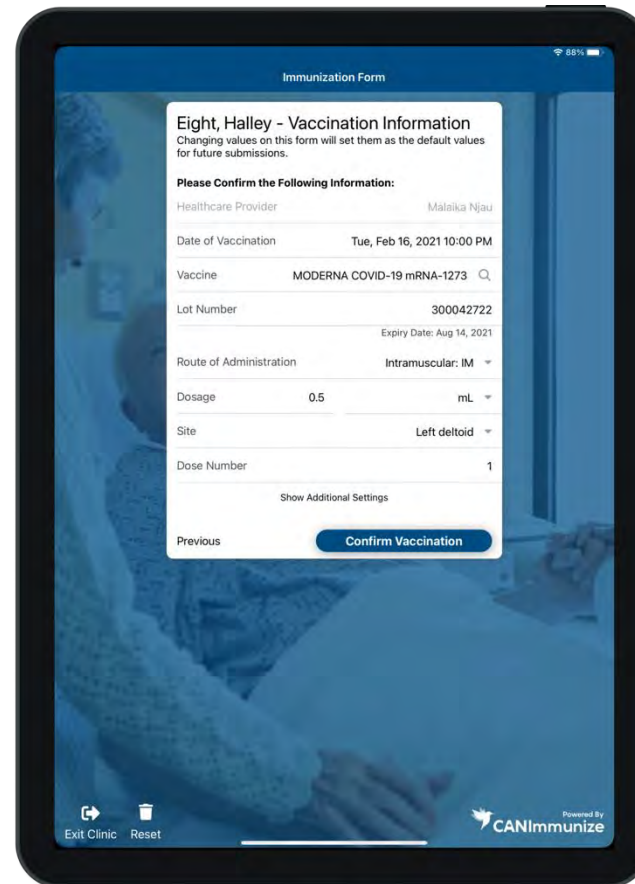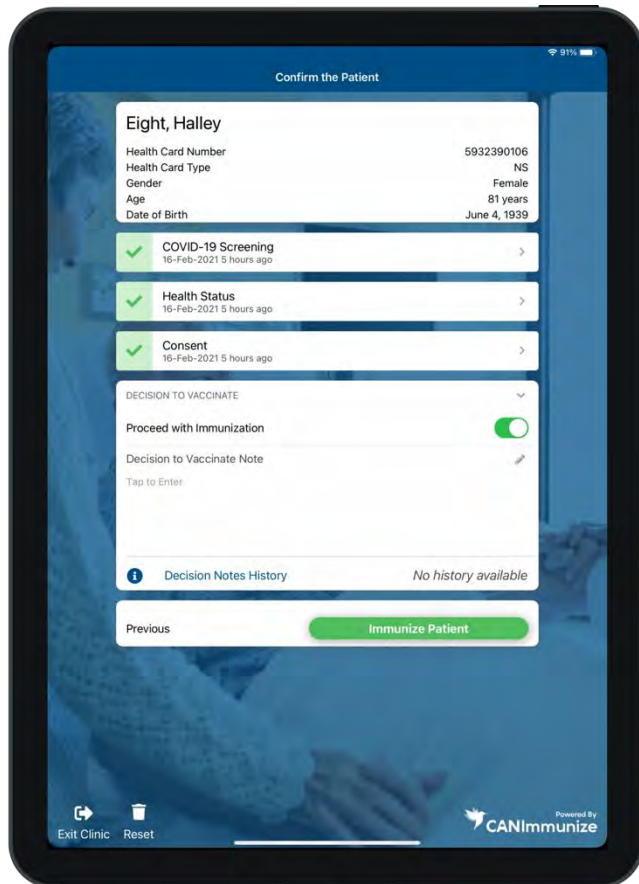
(10) You will then see the vaccination receipt details as pictured below. If the client has an email and health card number on file, the system will send a digital vaccination receipt. If not, you will have to issue a paper copy.

(11) You will also see the appointment is marked as completed.

Success

CANImmunize vaccination has been recorded. Please issue a manual immunization receipt.

Full Name	Eight, Halley (Female)
Birthdate	1939-06-04
Health Card Number	NS 5932390106
Vaccine Product	MODERNA COVID-19 mRNA-1273
Lot Number	300042722
Date	Feb 16, 2021 10:00 PM

Confirm

Exit Clinic   Reset

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Appointment - Eight, Halley
- (903) 247-6907

Person	Age	COVID-19	Consent	Action
Eight, Halley	81 years	✿	✓	Completed

Previous   **Done**

Exit Clinic   Reset

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CANImmunize

(12)   Finally, in the Clinic Roster, the appointment is highlighted in Green to indicate that it is complete.
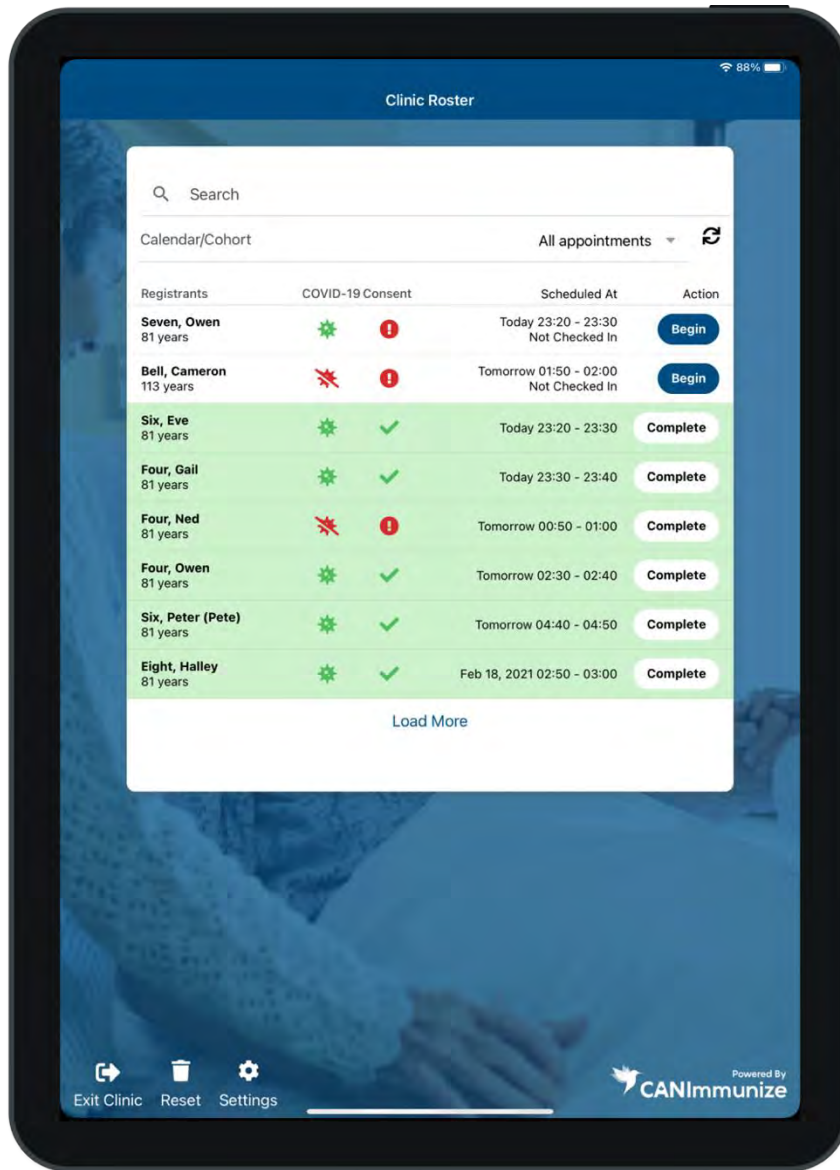
2. Ivanka Four – Complete Forms and Vaccinate
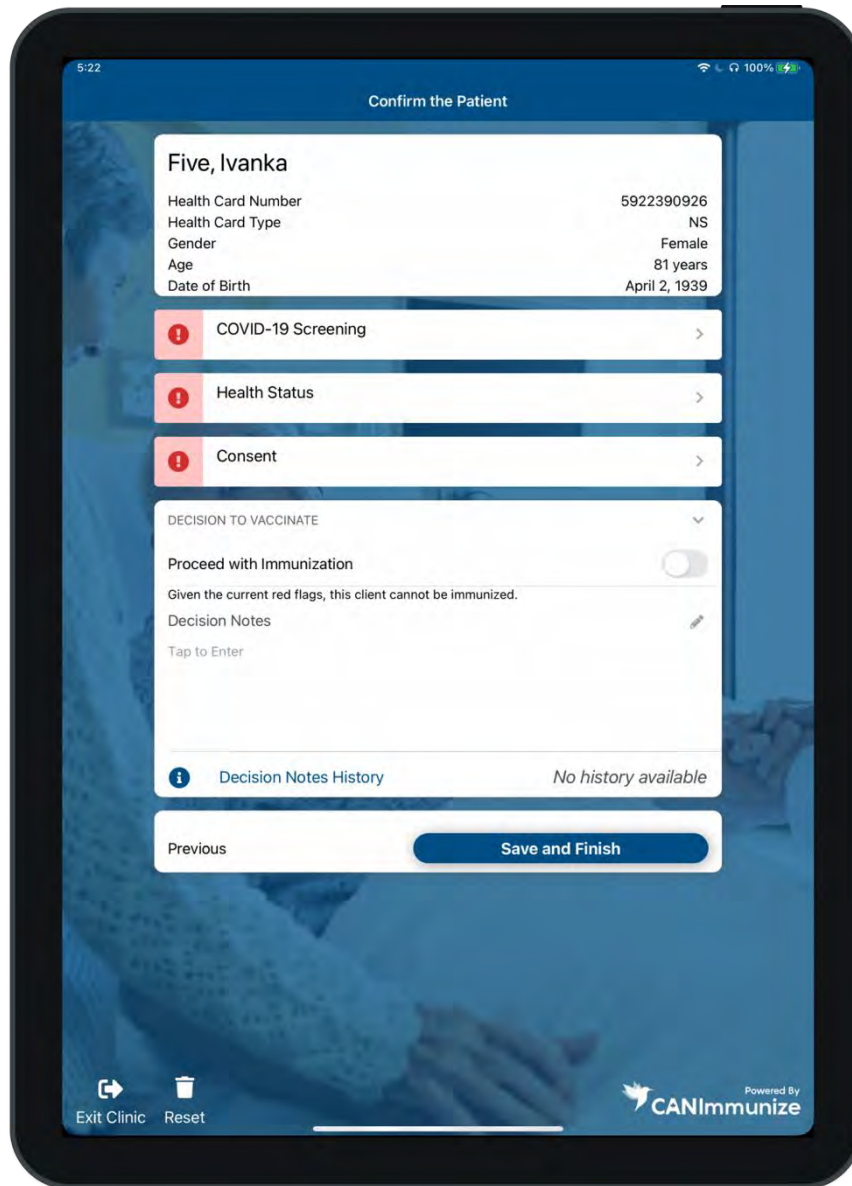
Ivanka did not complete his forms. We will complete his Health Status and Consent form before administering a vaccination. Open Cameron's Appointment details and press "open" to see the screen on the left.

Complete Ivanka's forms: press "Health Status" to view form. Input Cameron's responses. Do the same for Consent Form

Ivanka's Health Status Info:
- Essential Worker
- First COVID-19 vaccination
- No health issues or allergies
- Has not contracted COVID-19
- Not pregnant or breastfeeding
- No previous adverse reactions to vaccines
- No

Ivanka's Demographic Information:
- African Nova Scotian
- Latino

Ivanka's Consent Information:
- Tiana has read the vaccine information sheet
- Tiana consents to the Vaccine

Once forms are completed, toggle the decision to vaccinate on. You must toggle the decision the vaccinate on in order to proceed with the vaccination. Your screen will appear as follows.

Immunize the Client: press "Immunize Patient" and review your Clinic Mode Settings. Review the Immunization form to ensure all the information is correct. Press "Confirm Vaccination" once the vaccination has been administered.
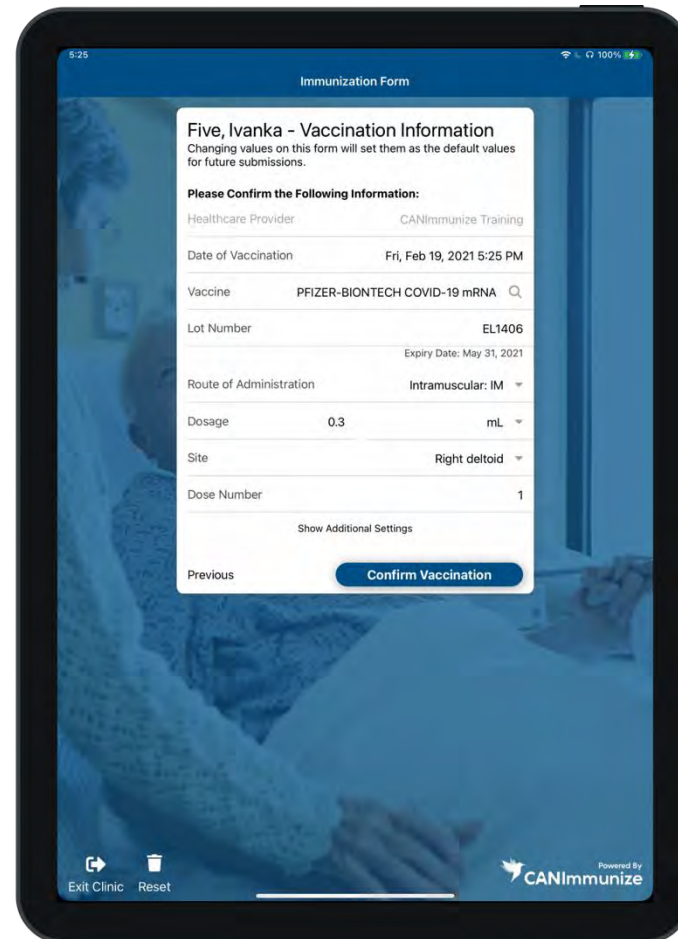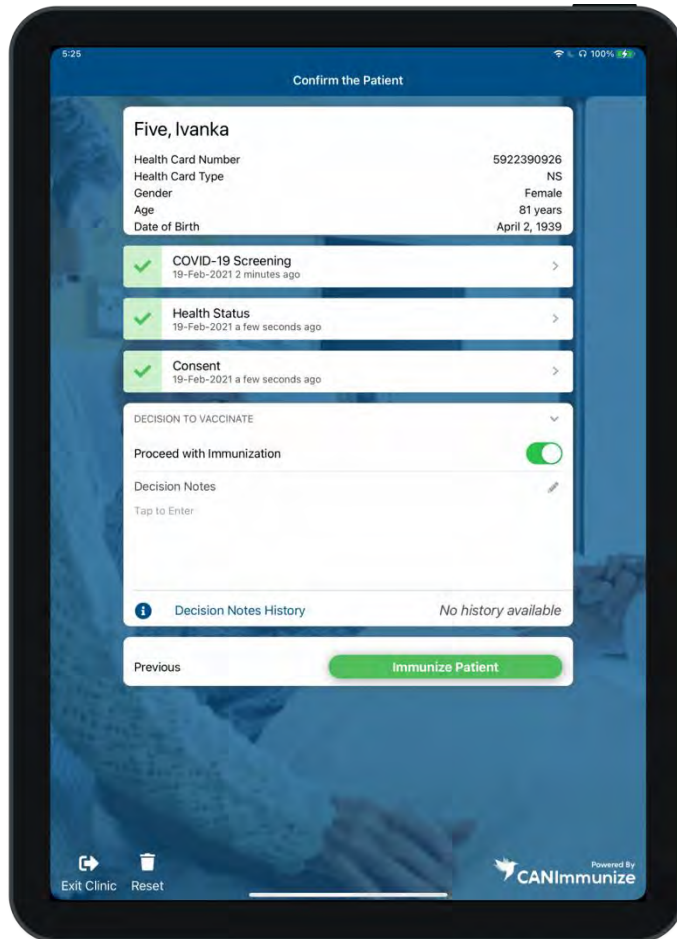
Immunization Receipt: If the Client/Resident has an email address they will get a digital immunization receipt to their email. If the Client/Resident does not have an email address, you will need to issue a manual immunization receipt.
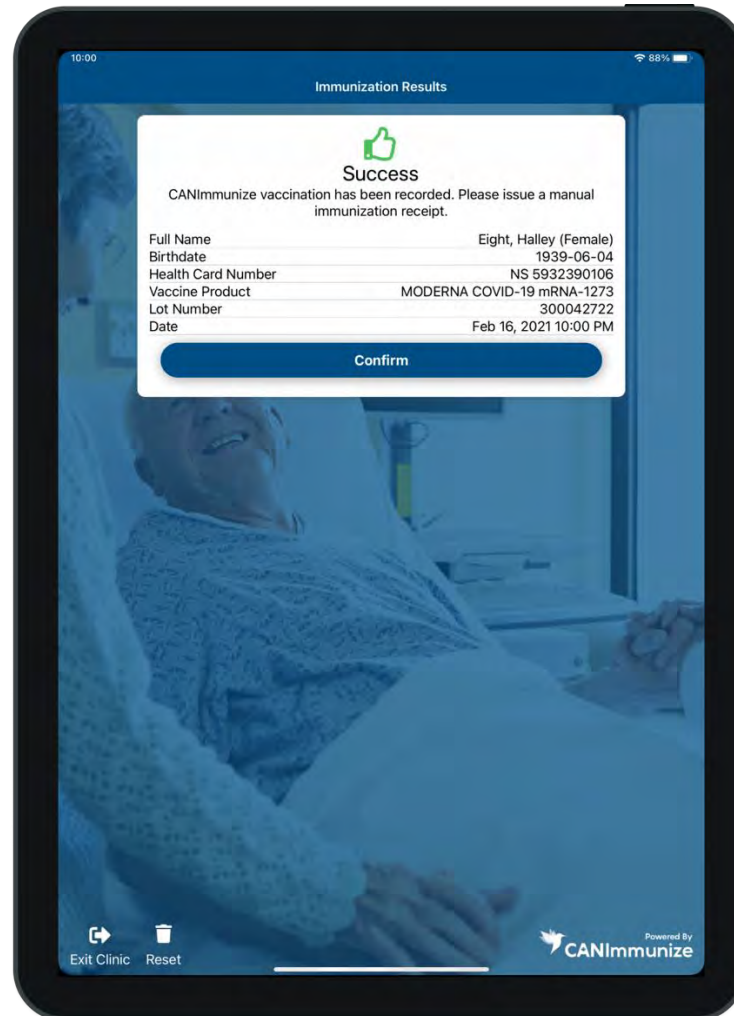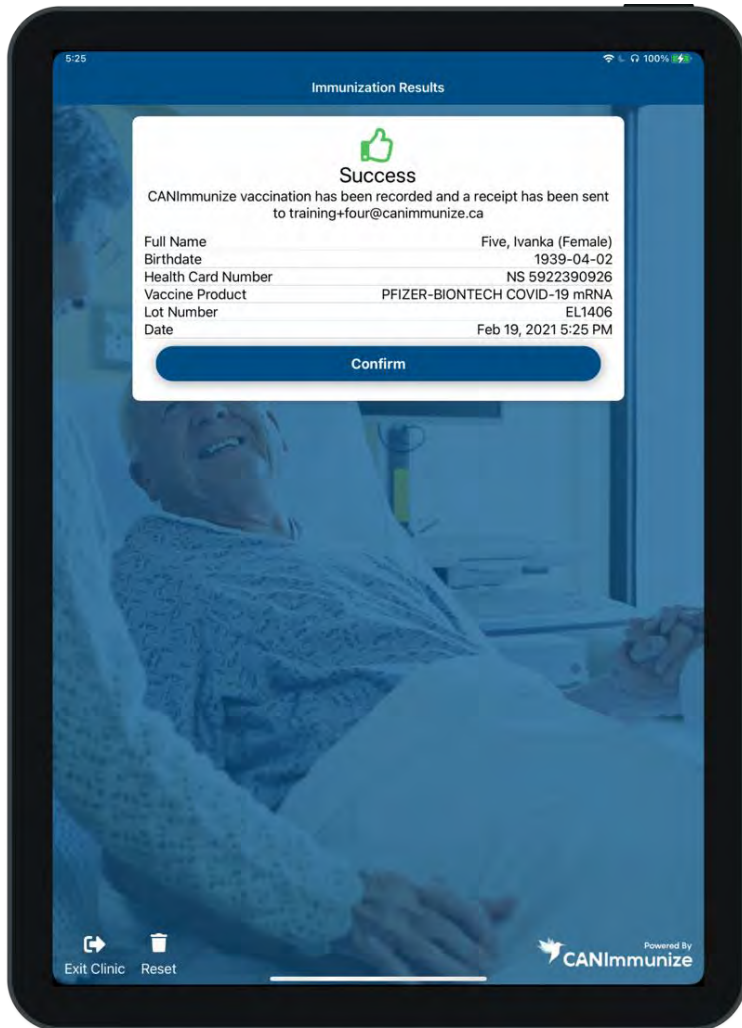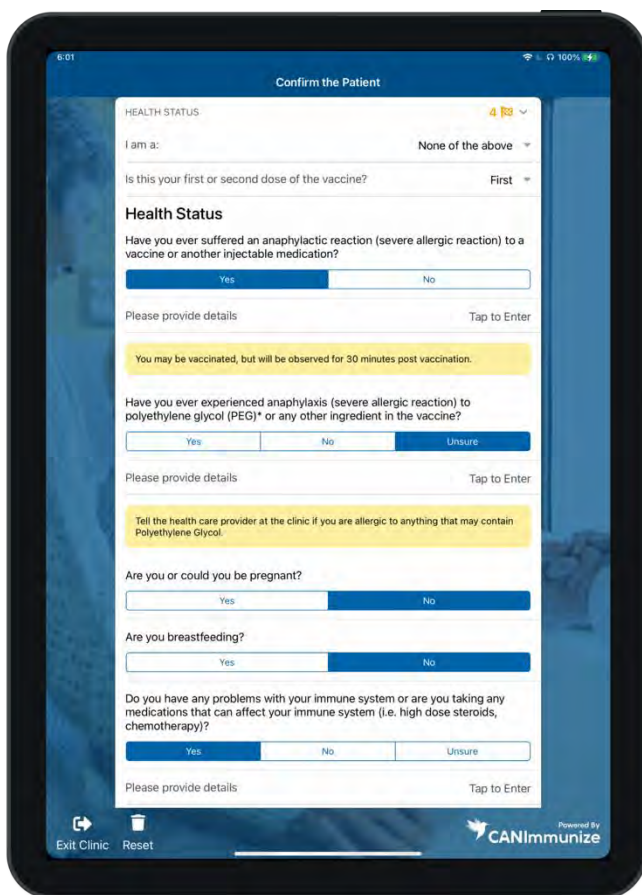
3. Michel Six – Review, Update Forms and Vaccinate

Michel has completed his Health Status form and Consent form. His Health Status form shows 4 yellow flags, and his Consent form shows a red flag.

(1) From the Client Roster search for Michel's name and press "Begin" to open his Appointment details. Press "Open" to see the below screen
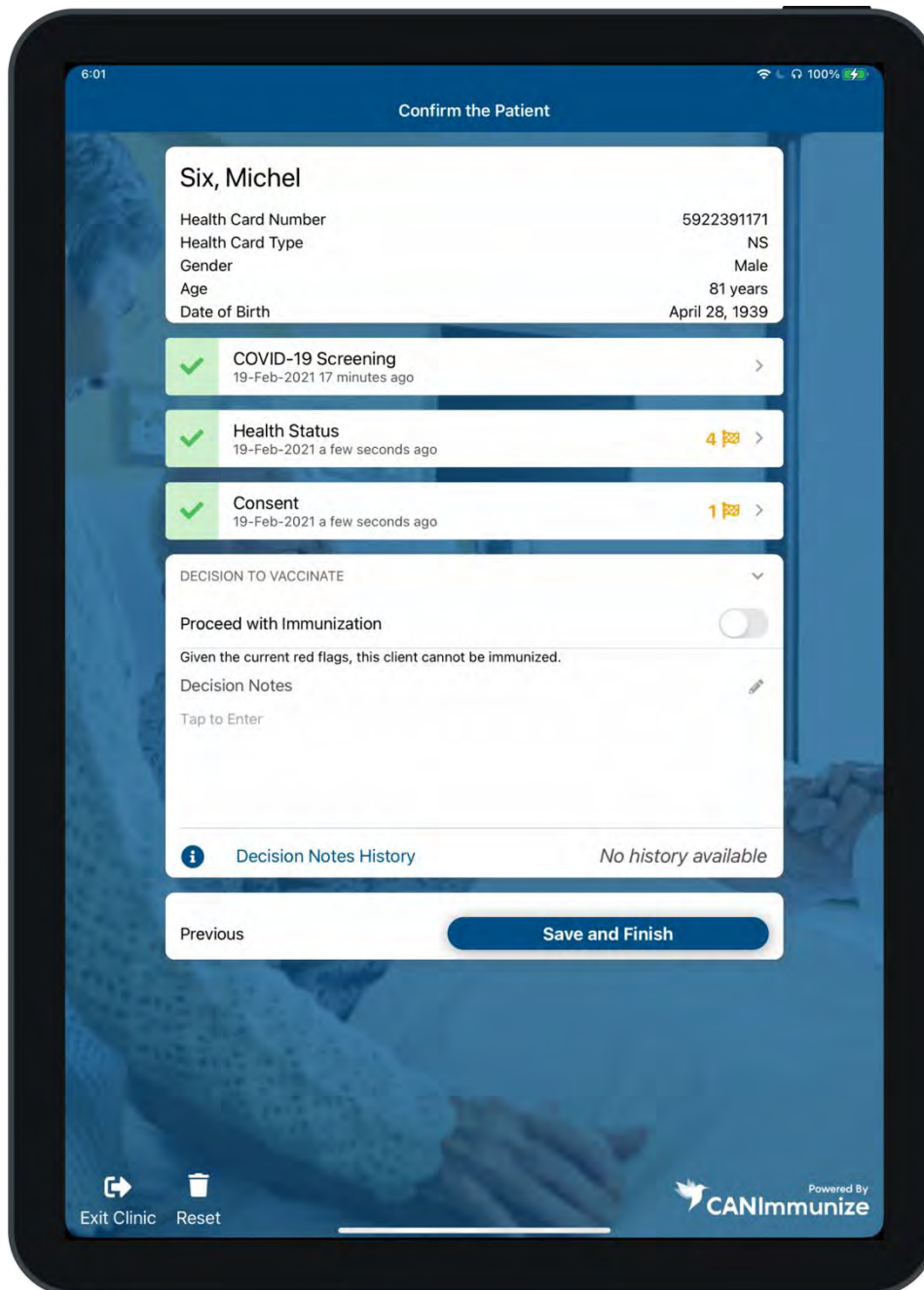
(2) Review and discuss questions which have yellow flags. Update answers when appropriate
- Have you ever suffered an anaphylactic reaction (severe allergic reaction) to a vaccine or another injectable medication? Discuss risks and benefits. Decision to proceed with vaccination.
- Have you ever experienced anaphylaxis (severe allergic reaction) to polyethylene glycol (PEG)* or any other ingredient in the vaccine? Updated response: No. NOTE: if Michel was allergic to PEG he would not be allowed to receive the vaccination
- Do you have any problems with your immune system or are you taking any medications that can affect your immune system (i.e. high dose steroids, chemotherapy)? Discuss risks and benefits. Decision to proceed with vaccination.
- Do you have any problems with your immune system or are you taking any medications that can affect your immune system (i.e. high dose steroids, chemotherapy)? Updated response: No
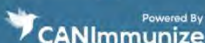- Do you have an autoimmune disease? Discuss risks and benefits. Decision to proceed with vaccination

(4) Review and discuss Michel's questions about the vaccine. Update his consent to "yes".

(5) Toggle on the decision to vaccinate. Add vaccination notes about any yellow flags you discussed with the Client.

(6) Immunize the Client. Ensure you have the correct Site listed. Issue a paper Immunization Receipt.

4. Savannah 22– Review, Update Forms and Vaccinate

(1) Open Savannah's Appointment details and press "open" to see the below screen

(2) Review and discuss questions which have yellow flags on her Health Status Form. Update the form according to your discussion
   - ○ Have you ever experienced anaphylaxis (severe allergic reaction) to polyethylene glycol (PEG)* or any other ingredient in the vaccine? Updated response: Yes. She is allergic to PEG.

Updated Form

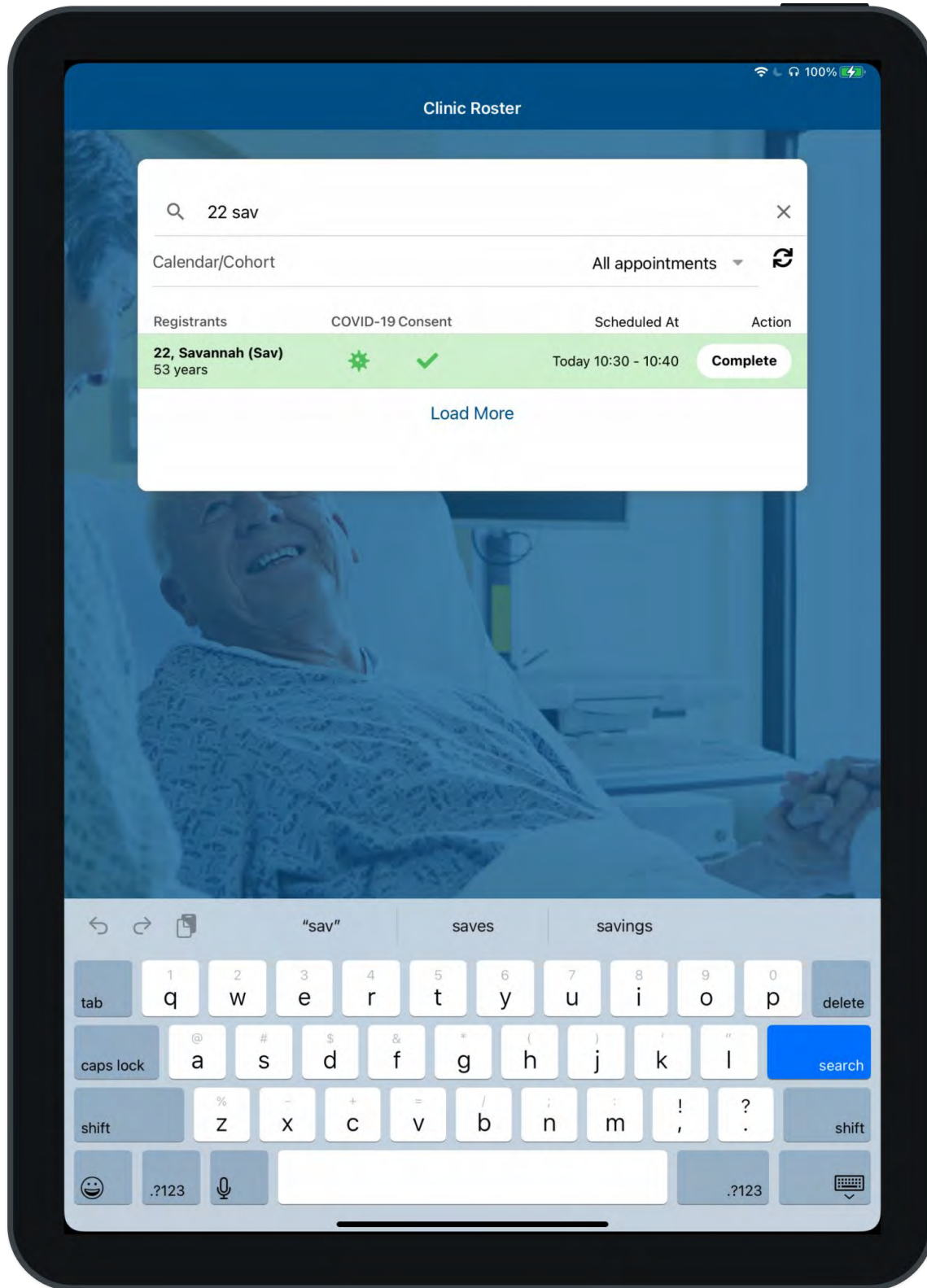(3) Add notes outlining why the decision not to vaccinate was made.

(4) Ensure the decision to vaccinate toggle is off

(5) Press "Save and Finish"

6) Savannah's appointment will be highlighted green as his appointment is completed

TROUBLESHOOTING: ERRO MESSAGES

Scenario: You accidently try to vaccinate the same Client with the same vaccine dose on the same day, you will get this error message.

Solution: Click "Okay" and then "Confirm" to return to Clinic Roster. Vaccination was not logged in the system.
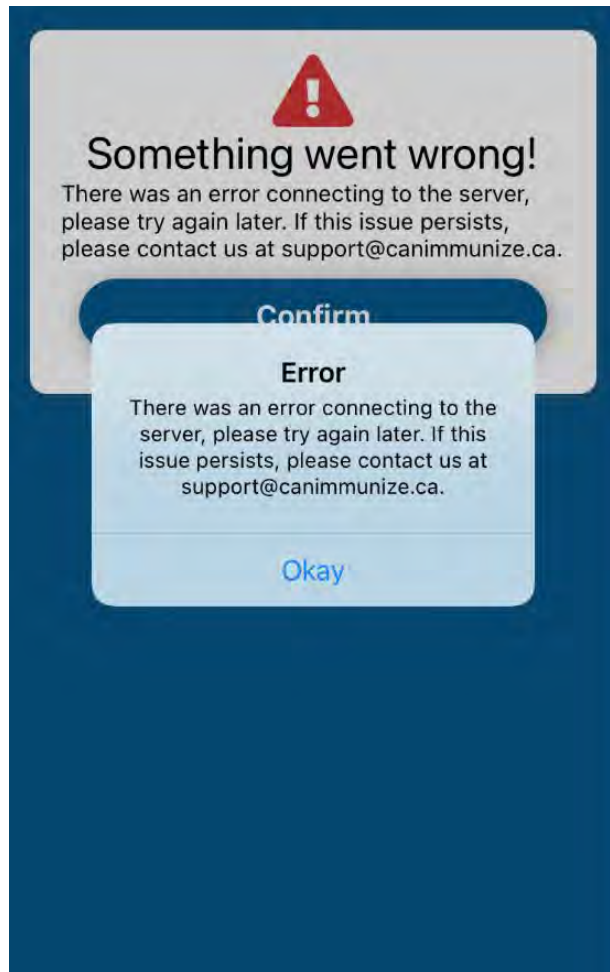
WHAT YOU HAVE LEARNED TODAY

- Login to the training environment
- Review Client demographics
- Review, edit or complete Forms
  - COVID-19 Screening
  - Client's Immunization Consent Form
    - Health Status
    - Race and Indigeneity
    - Consent
- Log a Client's vaccination and issue manual vaccination receipt
- Log vaccinations via the "Appointment Downtime Report"
- Login to your "Live" account