COVax_ON User Profile Set Up Job Aid

Your Profile: COVax User

This job aid outlines how to get set up within COVax_ON, how to log in and out of the system and specific user access details.

Setup Activities

Here are tasks you may need to perform. **Click the relevant link:**

#	Section	Description
1	User Access based on Authorized Organization	Details on COVax_ON profile types and access
2	COVax_ON Account Set Up	Steps to set up user accounts using the Salesforce two-factor authentication app
3	Subsequent Logins to COVax_ON	Steps to properly login to COVax_ON
4	Logout of COVax_ON	Steps to properly logout of COVax_ON

Additional Information

- The COVax_ON login process requires a a two-factor authentication process. You will need 2 devices each time you log into COVax_ON: 1) a smartphone and 2) a tablet/computer for using COVax_ON
- For any account timeout issues, please inquire with your site lead about contacting ITS

1. User Access based on Authorized Organization

All Users are associated with a profile type and an Authorized Organization in COVax_ON. This drives the ability to perform activities within COVax_ON on behalf of the Authorized Organization. The chart below describes the activities a User can perform at each access level.

There are 5 core profile types with defined access to COVax_ON:

| User Profile	Functionality Profile Has Access To	Reports/Dashboards Profile Has Access To
COVax Inventory Manager	• Create shipments & inventory • Link inventory to VEs, create and manage VEs • Report inventory reconciliations at the AO and VE levels • Manage transfers and recalls	• Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report
COVax Site Staff	• Search clients and update client information • Check in and check out clients • Create and manage VEs	• Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report • View Dashboards and the Linked Reports
COVax Vaccinator	• Search clients and update client information • Check in, vaccinate, and check out clients • Perform simplified clinical flow • Cancel Dose Admin Records • Merge duplicate clients • Create and manage VEs	• View Dashboards and the Linked Reports
COVax Site Super Users	• Inventory Manager functionalities • Vaccinator functionalities • Mass data client upload	• Read and Export Summary Client and Dose Administration Report, Detailed Client and Dose Administration Report& Vaccine Inventory Report, Duplicate Report • View Dashboards and the Linked Reports
COVax Dashboard User	• View Site Dashboards • Create and manage VEs	• No access to Reports • View Dashboards (cannot view the Linked Reports)

COVax_{ON} User Profile Set Up Job Aid

Each user profile is associated with one Authorized Organization. To View the Authorized Organization on your Profile:

1. Select your Salesforce avatar on the top right-hand corner of the page.
2. Select "Settings."
3. Navigate to "Advanced User Details."
4. Scroll-down to check your "Authorized Organization."
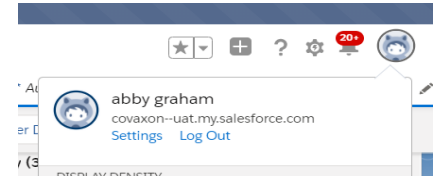
Users Who Work at Multiple Authorized Organizations (AO)

- Separate login credentials will be granted for users who work across multiple Authorized Organizations.
- Contact the Site Lead of the new AO you require access to, so they can submit a request to the ITS team to grant you additional login credentials.
- Users with multiple accounts will use the same email for all accounts, but with a slightly modified username. An example of this is:
  - **Account 1:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon
  - **Account 2:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon2
- The Site Leads are encouraged to regularly audit the list of Users and revoke access to any inactive users. In the case that it is a secondary account, ensure to indicate that in the User template.
- If a User is improperly mapped to an AO and only works for one AO, a request can be submitted by the Site Lead of the AO to the Service Desk for the AO to be changed.
- Please note**: if you work across multiple Vaccination Events within the same Authorized Organization**, you do not require multiple logins.
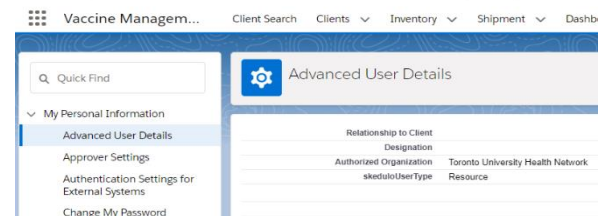
For Changes to User Profiles

Users at Clinics/Hospitals/LTCH/RH: Users must reach out to their Site Lead and request a User Profile change. The Site Lead will confirm their reasoning and reach out the ITS team on the user's behalf. The ITS team will grant the user refreshed login credentials for the new User Profile they are requesting.

Users at Pharmacies: Users may call the Service Desk to request a User Profile change. The service desk will provide the user with an email template that the Pharmacy Manager must fill out on the user's behalf.

Once filled out, the Pharmacy Manager will need to send the email template to the COVax_{ON} Support Mailbox using their One Mail Account to request the User Profile change.

Note: this process only applicable to changing user profile; adding new users to an AO or moving a user from one AO to another will follow the process explained above.

2. COVax_{ON} Account Setup

If you have previously logged into and authenticated Salesforce and are ready to download the Salesforce Authenticator app, skip to steps 9-16. If you are adding a secondary account to the Salesforce Authenticator app, skip to step 17.

1) On the provided tablet/computer/laptop, open COVax_{ON} in either **Safari, Google Chrome or Microsoft Edge** browser applications.
2) Using the search bar, enter the URL of your email provider (i.e. Gmail, UHN, Outlook, etc.)
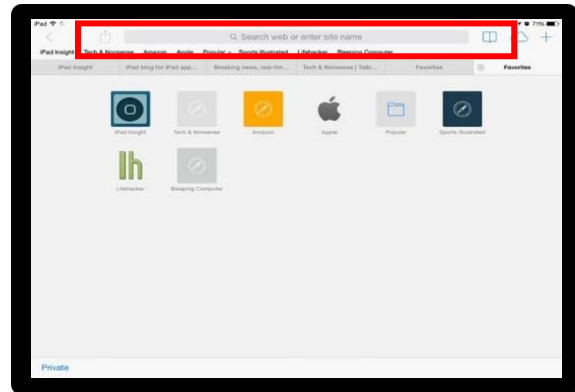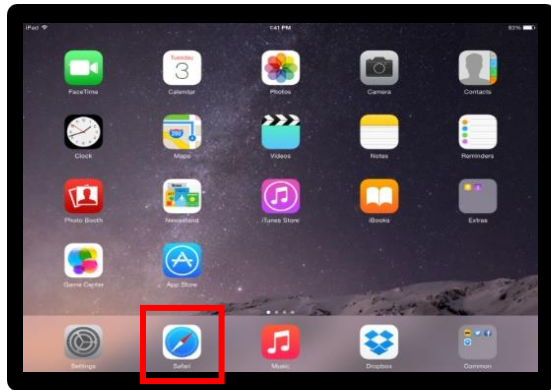
3) Log into your email account.
4) Open one of the following emails from support@jp.salesforce.com.
   - **Email 1:** Copy the email link and paste it into a separate browser (Safari/Chrome/Microsoft Edge).
   - **Email 2:** Right click the "Verify Account" button, select "Copy Hyperlink" and paste this URL into your browser.
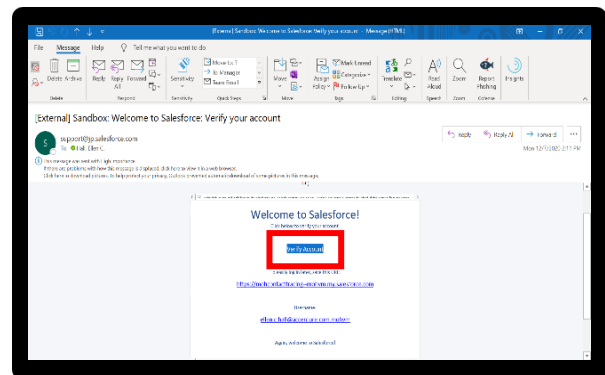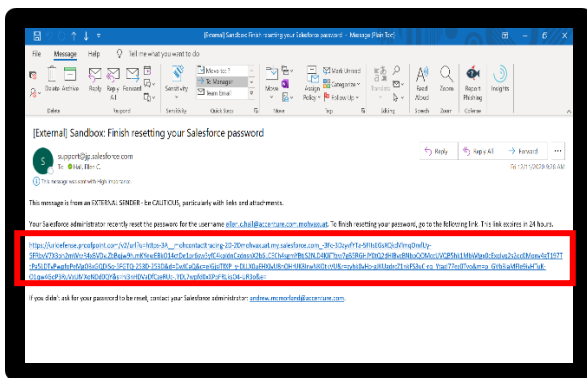

5) Once the link is pasted in your browser, hit enter.
6) You will see the "Acceptable Use Policy". Scroll down to read through the policy. To agree to the terms, click the "**Finish**" button at the bottom.
7) You will be directed to this screen. Do not exit this window. **Set the tablet/computer/laptop aside and grab your mobile phone.**
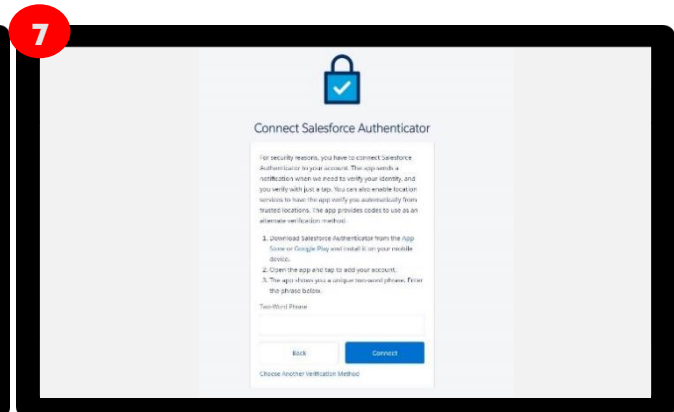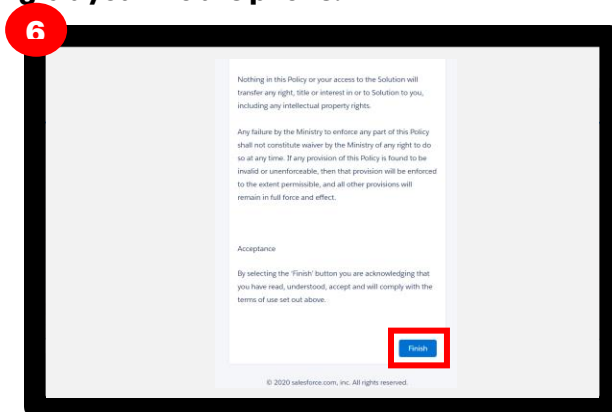
8) **On your mobile phone**, open either the Google Play (for Android or Pixel) or Apple App Store (for iPhone). *Note: if you have already gone through the registration process on the Salesforce Authenticator app, and see a 2-word phrase, skip to step 17 to add a new account.*
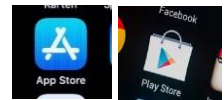
9) Using the search bar, type in "**Salesforce Authenticator**". Click on the title "Salesforce Authenticator."
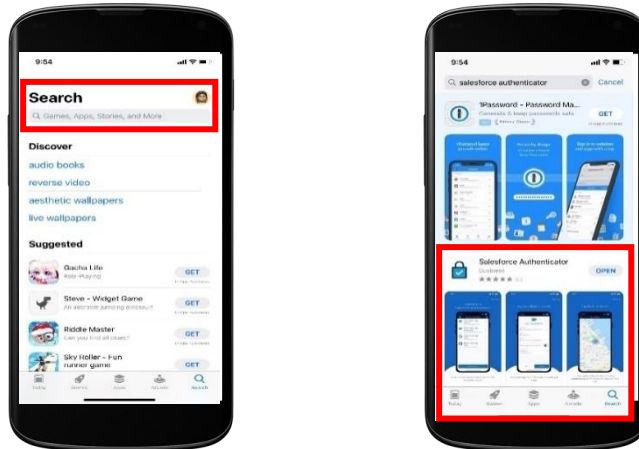
10) Select "**Get**". Enter your Play Store / App Store credentials if needed.
11) **On your mobile phone**, open the Salesforce Authenticator app.
12) When asked if you allow this application to send notifications, select "**Allow**".
13) Click "**Skip Tour**" at the top right corner of the screen.

14) Enter your mobile phone number using the keypad. Click the "**Send**" button to have Salesforce send you an automated SMS message.
15) Wait to receive an automated SMS message from Salesforce. Once you have received the SMS message, **open the message**. **Click the link** that is provided.
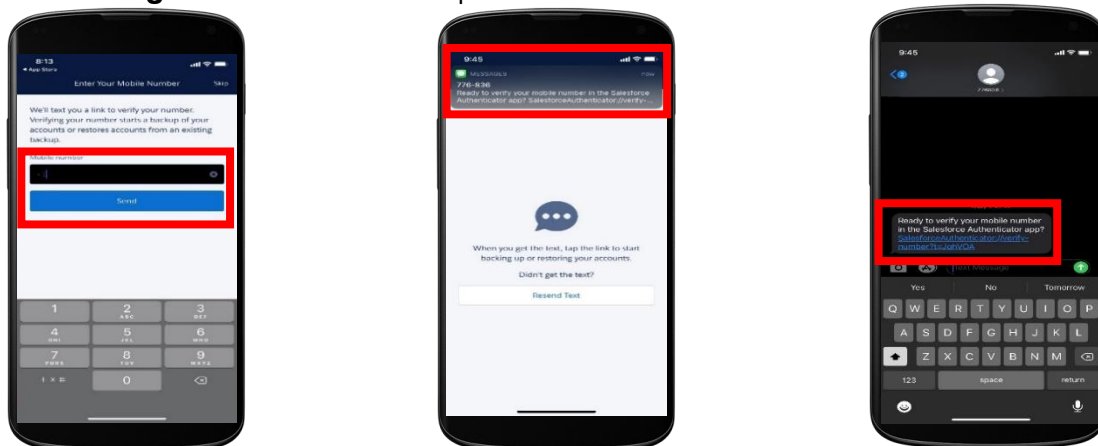
16) Once you click on the link, this window will open on your mobile phone. **Choose a 4-digit passcode**, and then **verify** that passcode by entering it in a second time.
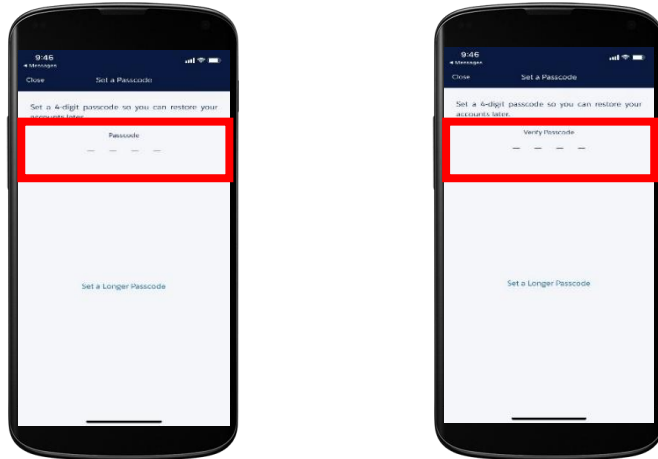
17) A green message will appear at the top of your screen indicating that the passcode has been saved. Click the "**Add an Account**" button to continue.
*Note: if you have already gone through the registration process on the Salesforce Authenticator app, and you are logging into a new environment, you can start here to by selecting **"Add an Account."***

18) On your mobile within the Salesforce Authenticator app, you will see a **two-word phrase** provided.

19) **Put your mobile phone down. Using the tablet**, go back to the browser window from step 7. Enter the two-word phrase in the box below.

20) The following message will appear. Follow the prompt and **go back to your mobile device**.

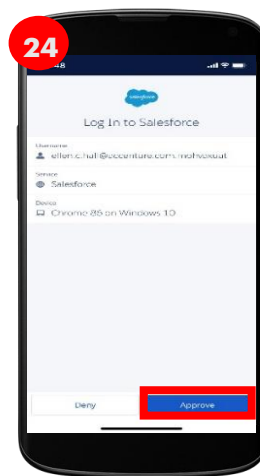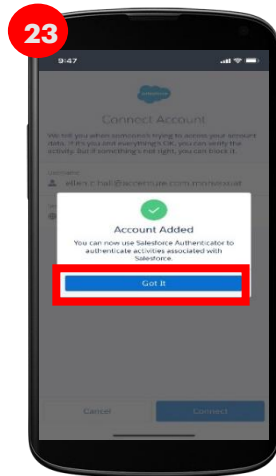21) On your mobile device, open the Salesforce Authenticator app.

22) The following screen will appear. Click "**Connect**".
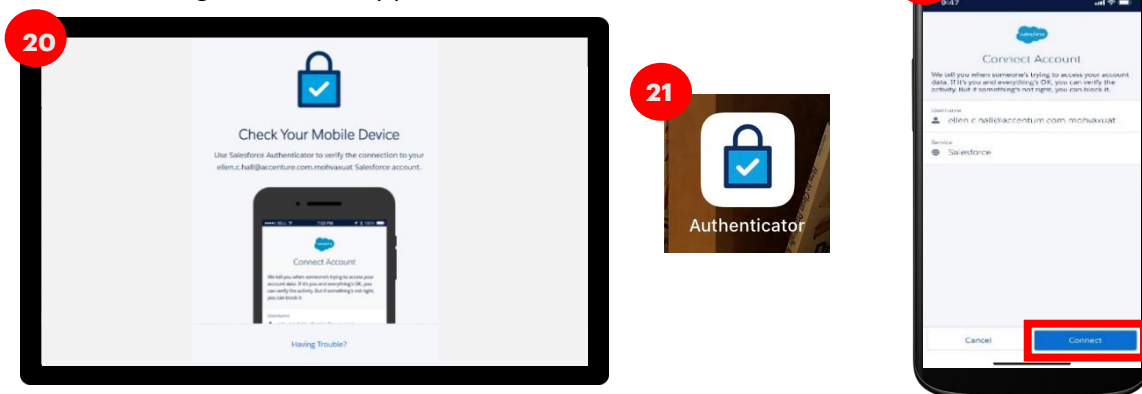
23) The app will indicate that the connection is successful. Click "**Got It**" to confirm.
24) The Salesforce Authenticator app will ask you to approve the account. Click "**Approve**".

25) Using the tablet/computer/laptop, go back to the browser window from step 20. Follow the prompts to create a suitable password. **Ensure that you remember this password for future use.** Click "**Change Password**". You will then be logged in. You must remember this password to log into COVax_{ON.}
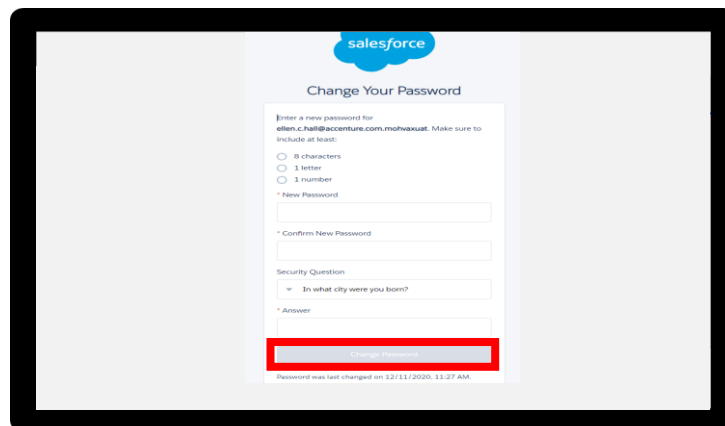
26) Once logged in, the COVax_{ON} home page will appear as follows:
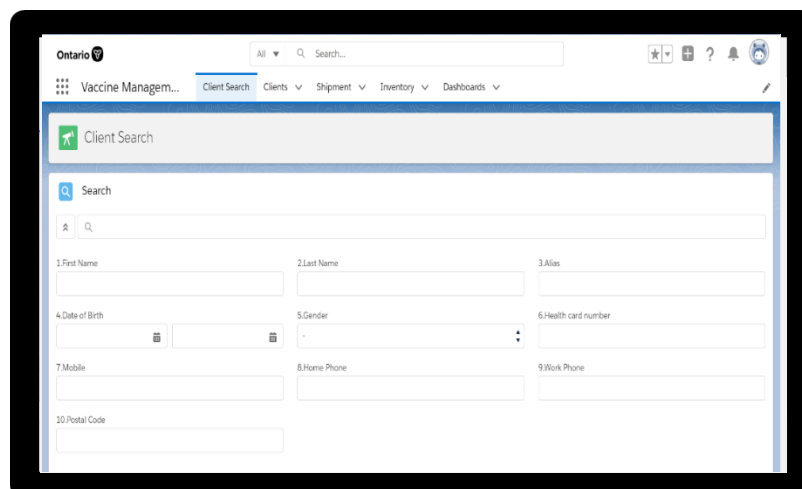
## 3. Subsequent Logins to COVax_{ON}

1) Open COVax_{ON}
   - *If using a tablet*: open using the installed application.
   - *If using a desktop:* open the browser (Safari, Google Chrome or Microsoft Edge) and go to the COVax_{ON} URL link.
2) Enter your username and password credentials. Click "**Log In To Sandbox.**"

3) You will see the "Acceptable Use Policy". Scroll down to read through the policy.
   Click the "**Finish**" button at the bottom of the Acceptable Use Policy to agree to the terms.
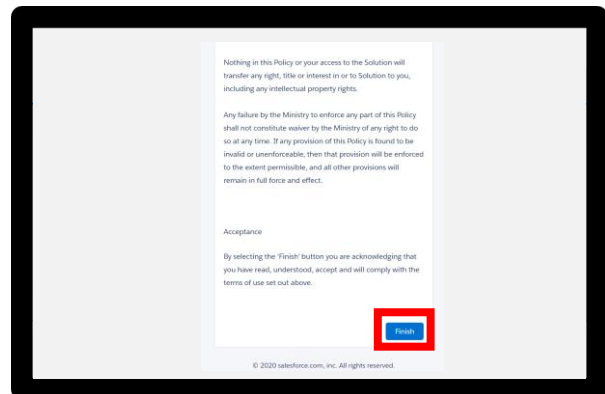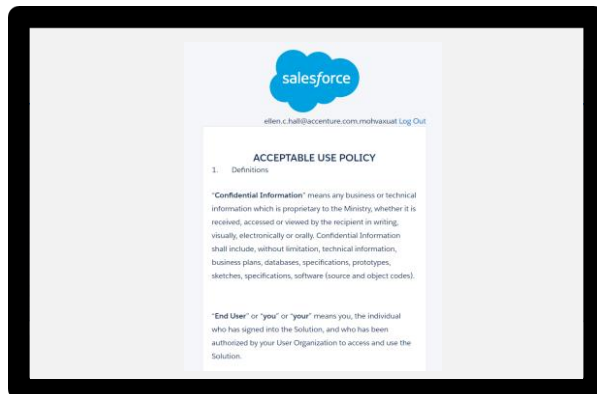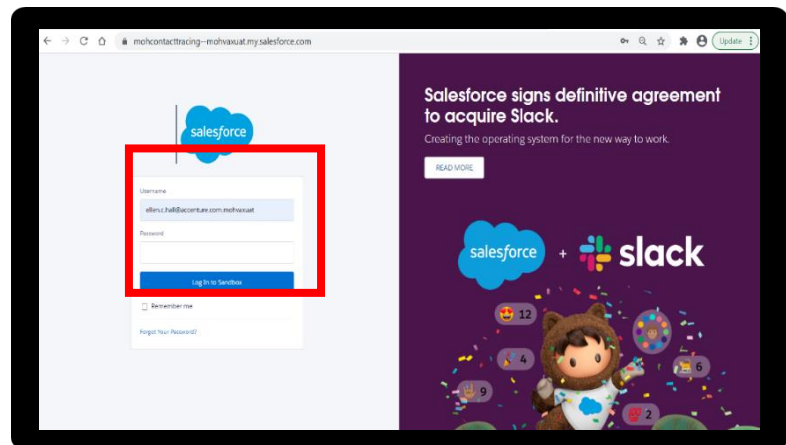
4) The first time you normally login, you will need to register your mobile device.
   - Ensure you change the country to "**Canada**".
   - **Enter your mobile number,** Click "**Register**".
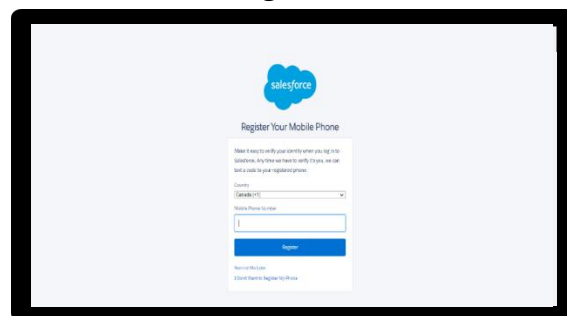
5) You will receive a text message on your mobile with a verification code.
   - Enter this code on the screen.
   - Click "**Verify**".

Note: This is a one-time step. Once you complete this step, it will not appear for future logins.

6) On your mobile device, you will receive a request from the Salesforce Authenticator app.
7) Open the application and select "**Approve**".
8) On the tablet/computer/laptop, you will be brought to the COVax_{ON} home page.
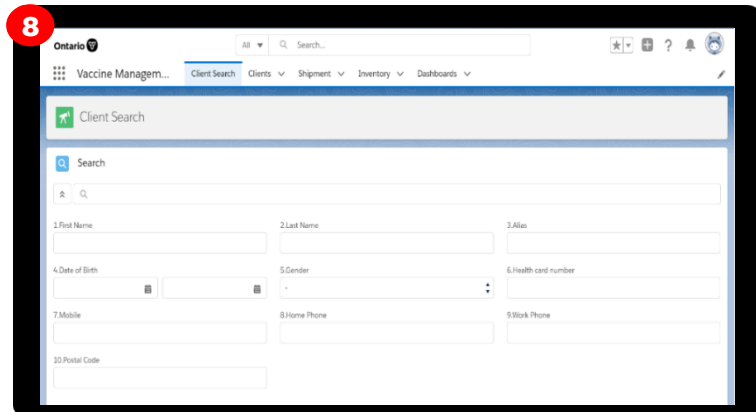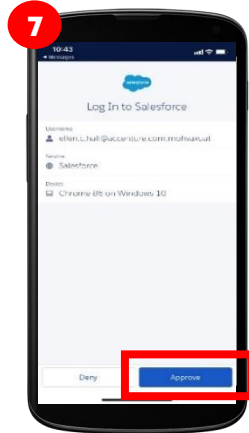
9) If using multiple Salesforce logins (i.e. if you belong to multiple AOs and require different logins) you will need to add a new account to your
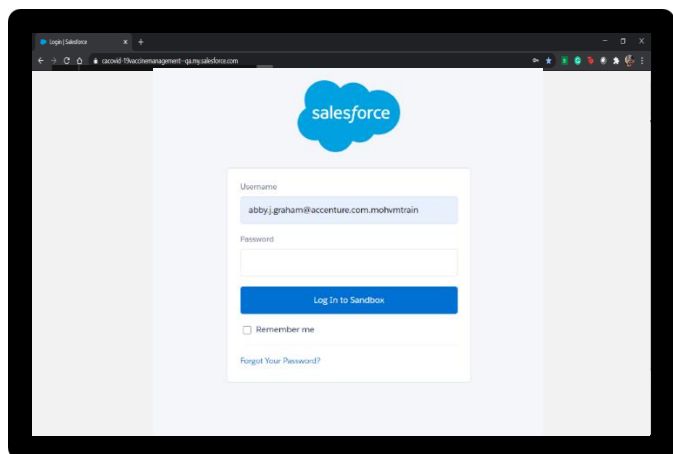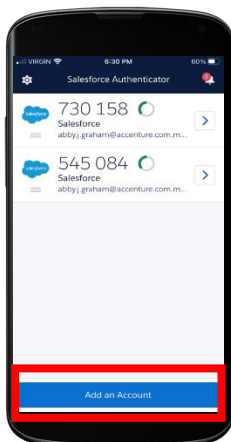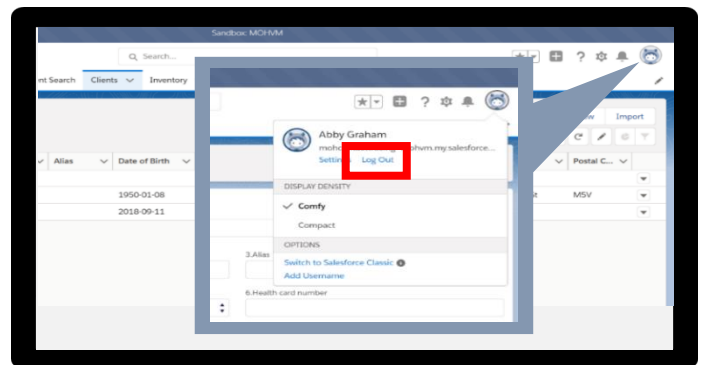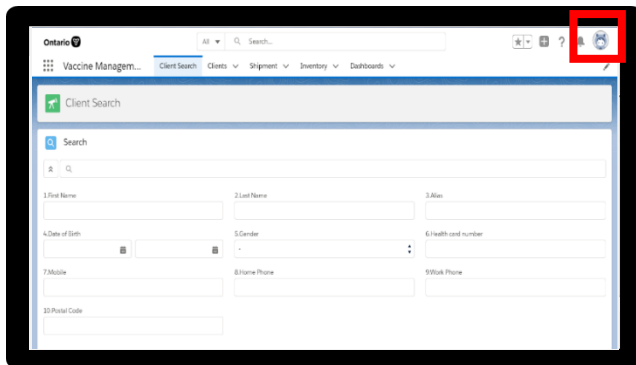
authentication app. You can do this by clicking logging out of the account (see **section 4** below), and then pressing "Add an Account" on the Salesforce home screen.

4. Logout out of COVax_{ON}

1. On the tablet/computer/laptop, select the icon on the top right corner on the COVax_{ON} home screen. Select "Log Out"

2. Exit the browser window.
3. Open tablet/computer/laptop Settings and follow the steps to clear your browser history.
4. Sanitize shared devices according to individual site protocols and provide to on-site IT.