

COVaxON User Profile Set Up Job Aid

Your Profile: COVax User

This job aid outlines how to get set up within COVaxON, how to log in and out of the system and reviews 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 COVaxON profile types and access
2	COVaxON Account Set Up	Steps to set up user accounts using the Salesforce two-factor authentication app: 2.1 - Accessing the Salesforce Support Email 2.2 - Setting Up Two Factor Authentication 2.3 - Changing Your Password
3	Subsequent Logins to COVaxON	Steps to properly login to COVaxON
4	Logout of COVaxON	Steps to properly logout of COVaxON

Additional Information

- The COVaxON login process requires a two-factor authentication process. You will need 2 devices each time you log into COVaxON: 1) a smartphone and 2) a tablet/computer for using COVaxON
- For any account timeout issues, please inquire from 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 COVaxON. This drives the ability to perform activities within COVaxON on behalf of the Authorized Organization. The chart below describes the activities a User can perform at each access level.

There are 7 core profile types with defined access to COVaxON:

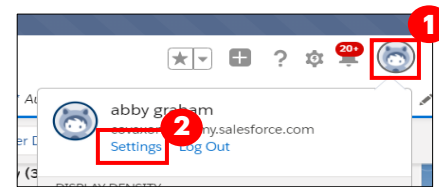
User Profile	Functionality Profile Has Access To	Reports/Dashboards Profile Has Access To
COVax Inventory Manager	<ul style="list-style-type: none"> Create shipments & inventory Link inventory to VEs, create and manage VE records Report inventory reconciliations at the AO and VE levels Manage transfers and recalls 	<ul style="list-style-type: none"> Read and Export Vaccine Inventory Report Summary Client Dose Admin Reports
COVax Site Staff	<ul style="list-style-type: none"> Search clients and update client information Check in and check out clients Read-only access for VE records 	<ul style="list-style-type: none"> Read and Export Vaccine Inventory Report, VE and AO Inventory Report, Summary Client Dose Admin Reports, and Client with Highest Risk (28 Days) Report View AO Site Dashboard, AO Scheduling Dashboards, and the associated Linked Reports
COVax Vaccinator	<ul style="list-style-type: none"> Search clients and update client information Check in, vaccinate, and check out clients Perform simplified clinical flow Edit Dose Admin Records Merge duplicate clients Read-only access for VE records 	<ul style="list-style-type: none"> View AO Site Dashboard, AO Scheduling Dashboards, and the associated Linked Reports
COVax Site Super Users	<ul style="list-style-type: none"> Inventory Manager functionalities Vaccinator functionalities Mass data client upload 	<ul style="list-style-type: none"> Read and Export Vaccine Inventory Report, VE and AO Inventory Report, Detailed Client Dose Admin Reports, Summary

COVaxON User Profile Set Up Job Aid

		<p>Client Dose Admin Reports, and Client with Highest Risk (28 Days) Report</p> <ul style="list-style-type: none"> View AO Site Dashboard, AO Scheduling Dashboards, and the associated Linked Reports
<p>COVax Clinic Coordinator <i>(will be used at Non-Primary Care Provider locations (PHUs, Hospitals, Pharmacies))</i></p>	<ul style="list-style-type: none"> All "Vaccinator" permissions Report inventory reconciliations at the VE level (Wastage, Extra Doses from Vial, No Consent) 	<ul style="list-style-type: none"> View AO Site Dashboard, AO Scheduling Dashboards, and the associated Linked Reports
<p>COVax Primary Care Provider Vaccinator <i>(used at Primary Care Provider locations)</i></p>	<ul style="list-style-type: none"> All "Vaccinator" permissions Report inventory reconciliations at the VE level (Wastage, Extra Doses from Vial, No Consent) 	<ul style="list-style-type: none"> View AO Site Dashboard, AO Scheduling Dashboards, and the associated Linked Reports
<p>COVax Dashboard User</p>	<ul style="list-style-type: none"> View Site Dashboards Read-only access for VE records 	<ul style="list-style-type: none"> No access to the Reports View Dashboards (cannot view the Linked Reports)

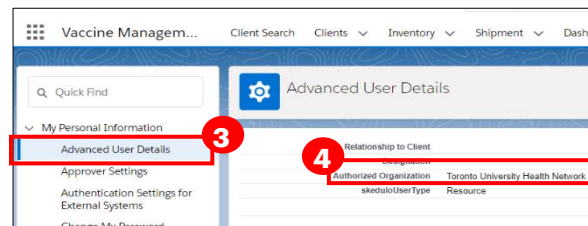
Each user profile is associated with one Authorized Organization. To View the Authorized Organization on your Profile:

- Click on your Salesforce avatar on the top right-hand corner of the page.
- Select **"Settings"**
- Navigate to **"Advanced User Details"**
- 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 a Site Lead is uploading a user for a secondary account, ensure to indicate that in the **"USERS_LOAD_TEMPLATE"** which is used to upload users to COVax"
- 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:

There are certain cases where a User's profile may need to be changed, such as if they are improperly mapped to an Authorized Organization or if their profile type (i.e. Vaccinator, Site Staff, etc.), needs to be updated. The below process should be followed for profile changes:

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.

COVaxON User Profile Set Up Job Aid

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 COVaxON Support Mailbox using their One Mail Account to request the User Profile change.

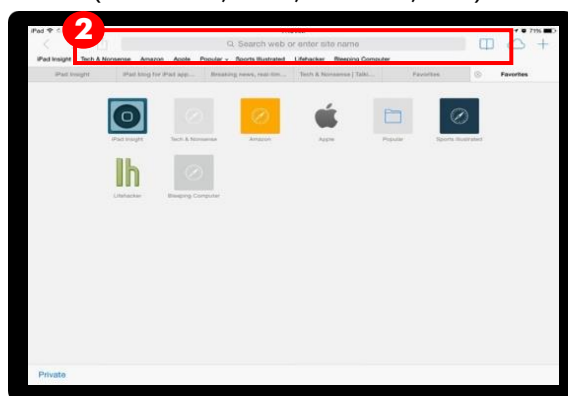
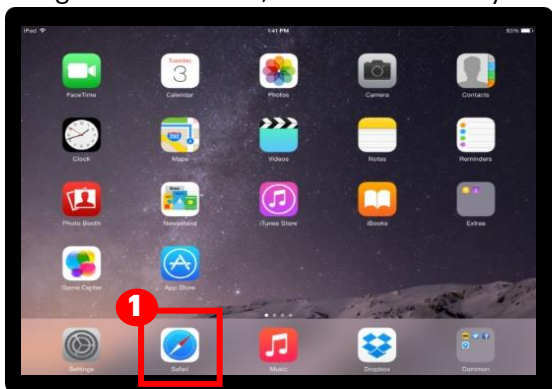
Note: this process is only applicable to changing user profile; adding new users to an AO or moving a user from one AO to another will follow the process explained above.

2. COVaxON Account Setup

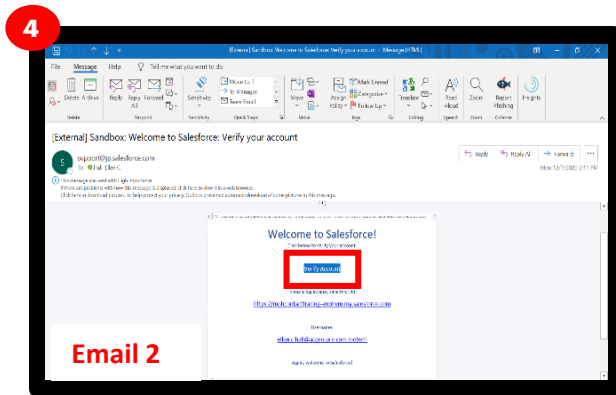
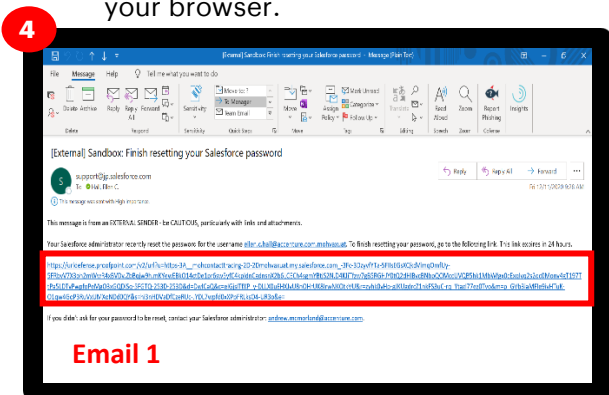
For new users, all the below steps are required to set up your account. For existing users that are adding a secondary account to the Salesforce Authenticator app, skip to Section 2.2 **“Setting Up Two Factor Authentication”** step 11.

2.1 Accessing the Salesforce Support Email

- 1) On the provided tablet/computer/laptop, open COVaxON 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.)

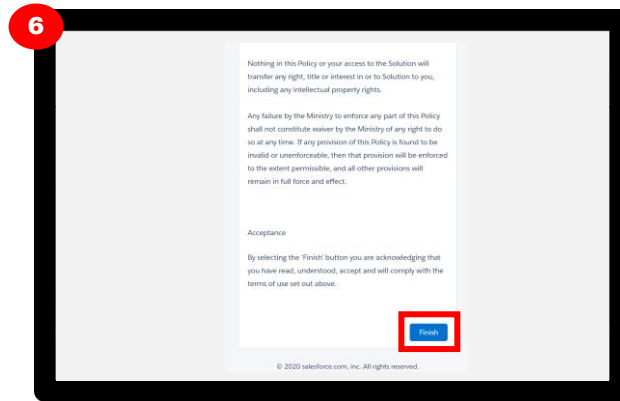


- 3) Log into your email account
- 4) Open one of the following emails from support@jp.salesforce.com.
 - **Email 1:** Copy the email link and paste it into a separate browser (Safari/Chrome/Microsoft Edge).
 - **Email 2:** Right click the **“Verify Account”** button, select **“Copy Hyperlink”** and paste this URL into your browser.



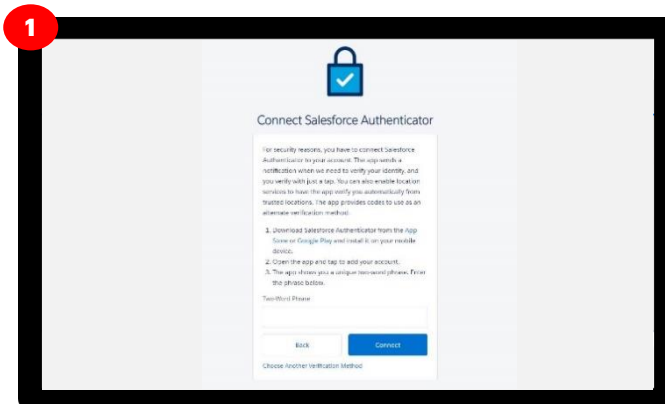
COVaxON User Profile Set Up Job Aid

- Once the link is pasted in your browser, hit enter.
- 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.

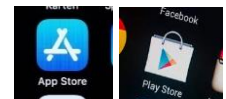


2.2 Setting Up Two Factor Authentication

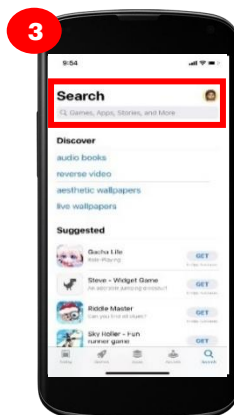
- You will be directed to this screen. Do not exit this window. **Set the tablet/computer/laptop aside and grab your mobile phone.**



- 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 12 to set up a new account.

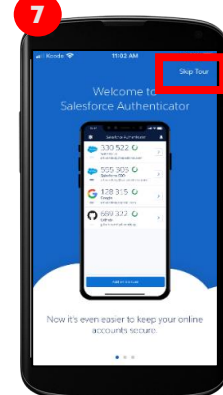
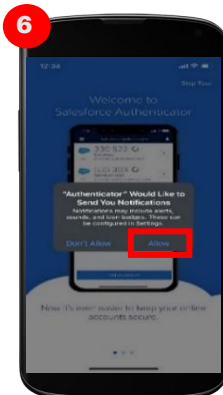


- Using the search bar, type in “**Salesforce Authenticator**”. Click on the title “**Salesforce Authenticator.**”

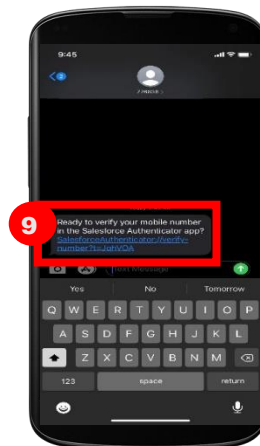
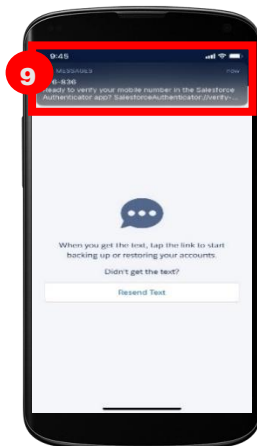
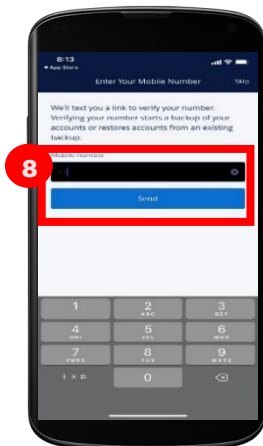


COVaxON User Profile Set Up Job Aid

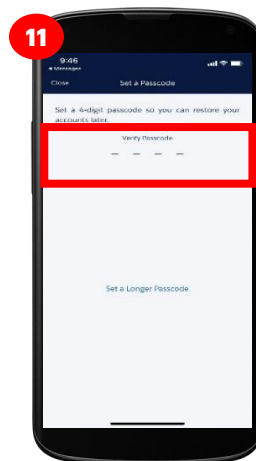
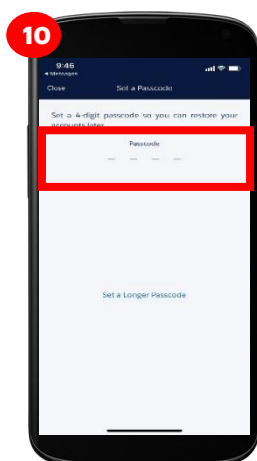
- 4) Press "**Get**". Enter your Play Store / App Store credentials if needed.
- 5) **Still on your mobile phone**, open the Salesforce Authenticator app.
- 6) When asked if you allow this application to send notifications, select "**Allow**".
- 7) Click "**Skip Tour**" at the top right corner of the screen.



- 8) Enter your mobile phone number using the keypad. Click the "**Send**" button to have Salesforce send you an automated SMS message.
- 9) 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.



- 10) 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.

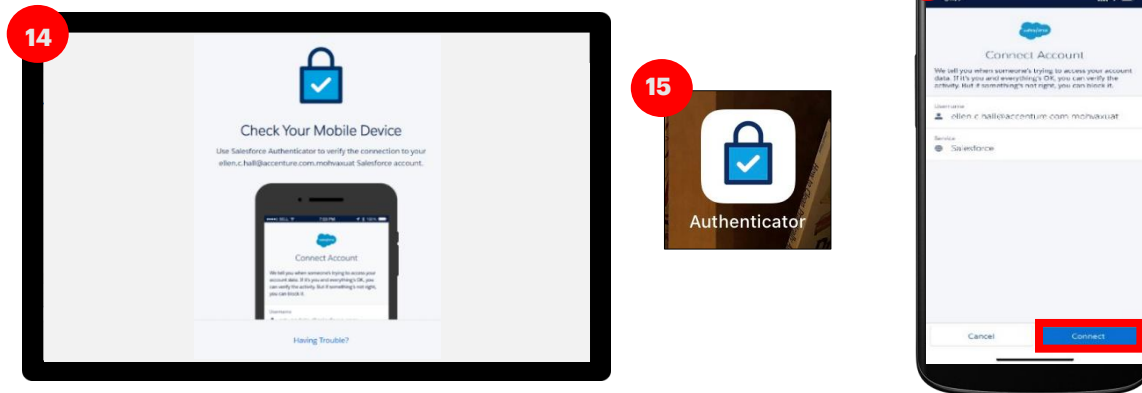


COVaxON User Profile Set Up Job Aid

- 11) 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 by selecting **"Add an Account."***
- 12) On your mobile within the Salesforce Authenticator app, you will see a **two-word phrase** provided.
- 13) **Put your mobile phone down. Using the tablet**, go back to the browser window from step 1. Enter the two-word phrase in the box below.

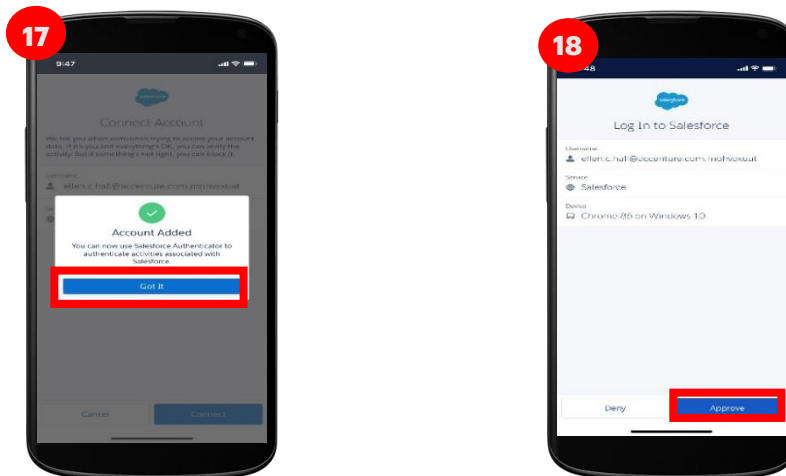


- 14) The following message will appear. Follow the prompt and **go back to your mobile device**.
- 15) **On your mobile device**, open the Salesforce Authenticator app.
- 16) The following screen will appear. Click **"Connect"**.



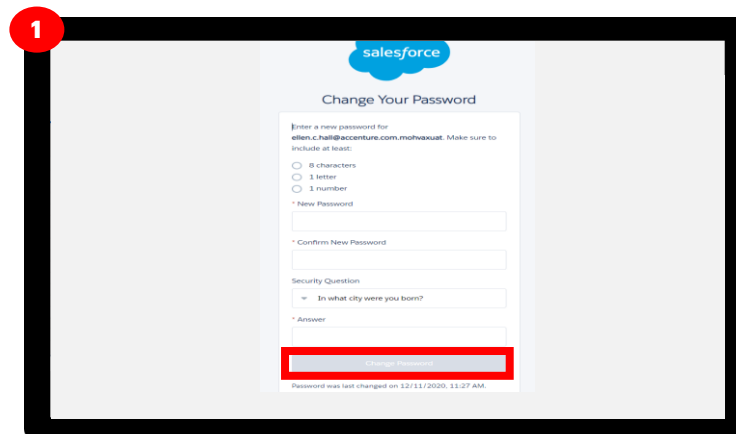
- 17) The app will indicate that the connection is successful. Click **"Got It"** to confirm.
- 18) The Salesforce Authenticator app will ask you to approve the account. Click **"Approve"**.

COVaxON User Profile Set Up Job Aid

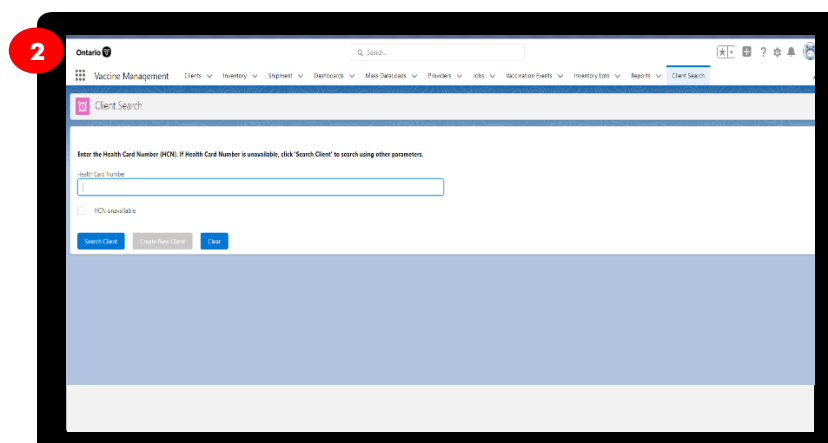


2.3 Changing your Password

- 1) **Using the tablet/computer/laptop**, go back to the browser window from step 14. 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 COVaxON.

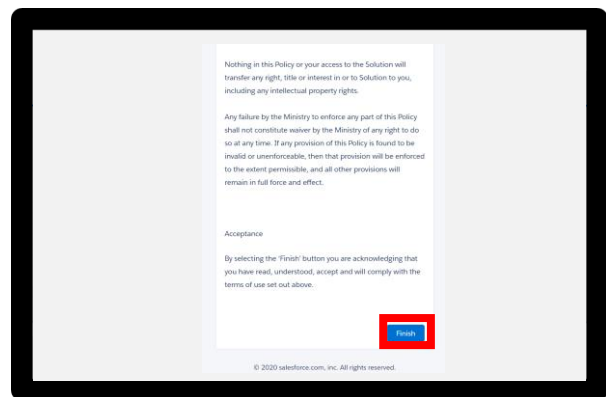
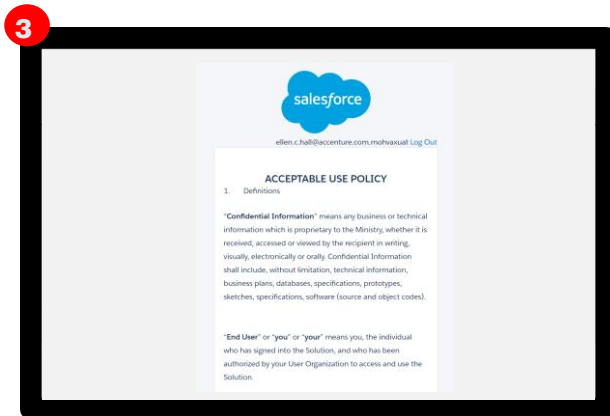
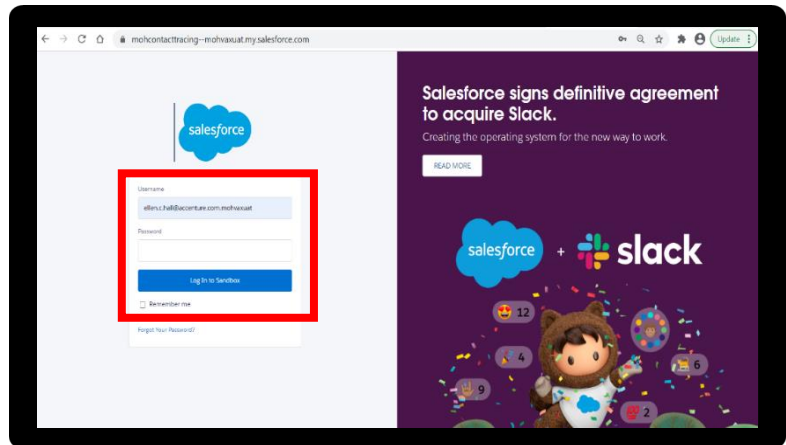


- 2) Once logged in, the COVaxON home page will appear as follows:

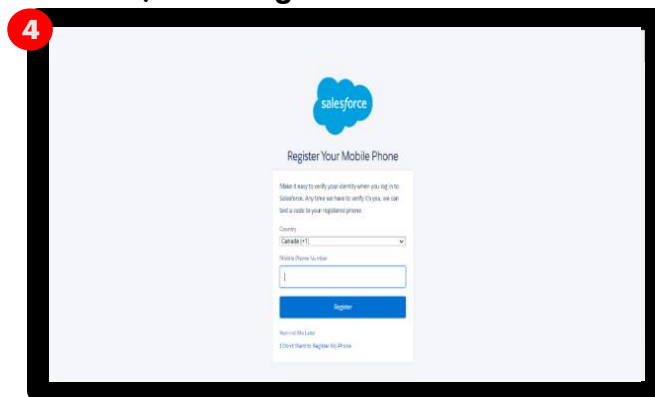


3. Subsequent Logins to COVaxON

- 1) Open COVaxON
 - *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 COVaxON 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.

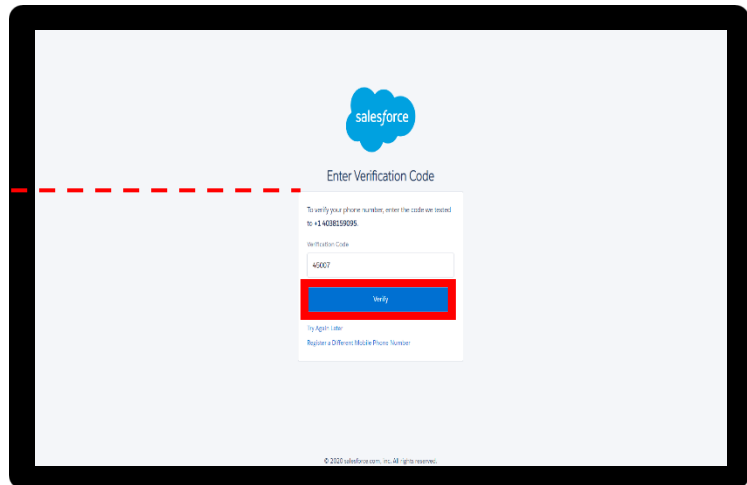
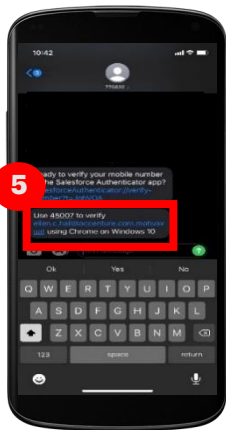


- 4) The first time you normally login, you will need to register your mobile device.
 - Ensure you change the country to **“Canada”**.
 - **Enter your mobile number**, Click **“Register”**.



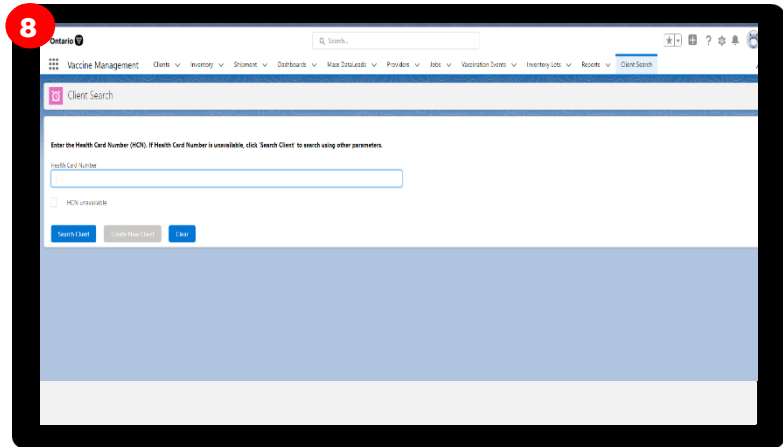
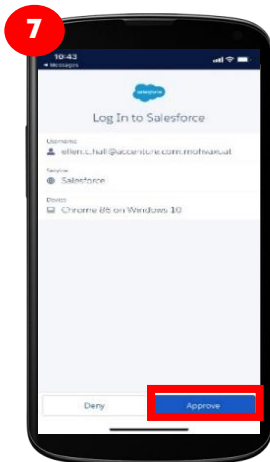
- 5) You will receive a text message on your mobile with a verification code.
 - Enter this code on the screen.
 - Click **“Verify”**.

COVaxON User Profile Set Up Job Aid



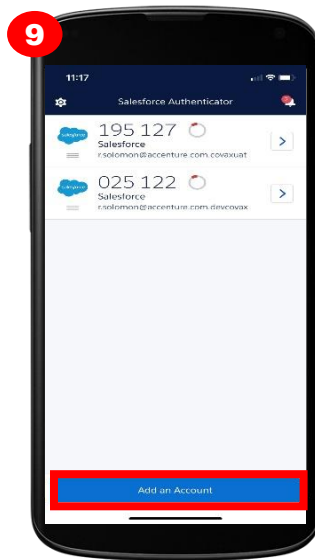
Note: This is a one-time step. Once you complete this step, it will not appear for future logins.

- 6) On your mobile device, you will receive a request from the Salesforce Authenticator app.
- 7) Open the application and click “**Approve**”.
- 8) On the tablet/computer/laptop, you will be brought to the COVaxON home page.



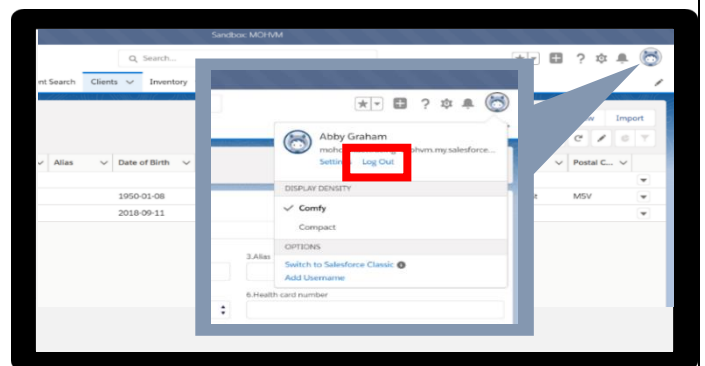
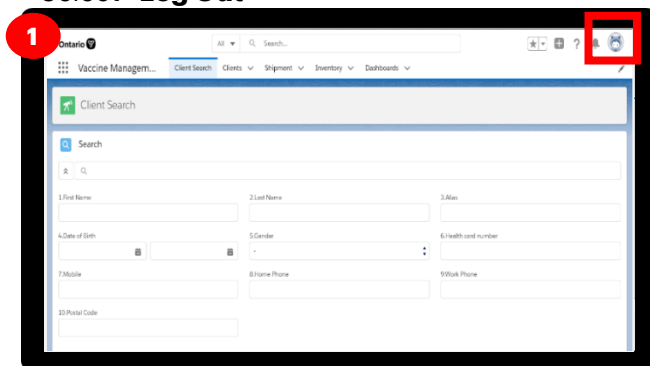
- 9) If using multiple Salesforce logins (i.e. if you belong to multiple AOs and require different logins) you will need to add a new account to your authentication app. On the Salesforce Authenticator App home screen, press “**Add an Account**”.

COVaxON User Profile Set Up Job Aid



4. Logout out of COVaxON

1. On the tablet/computer/laptop, click on the icon on the top right corner on the COVaxON 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.