COVax_{ON} Comprehensive Login, Logout, User Settings

Target Role: *All users of COVax_{ON} (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)*

Activity Description: This job aid outlines how to set up a new user profile within the COVax_{ON} Salesforce system, how to log in and out of the system and how a user can view their Authorized Organization. **Notes:** • COVax_{ON} accounts time out after 30 minutes of inactivity. However, iPad configuration settings may be set to log out before 30 minutes, and this will exit your Salesforce Account. This can manually be changed on the individual iPads or the service desk can be contacted. ==If you have previously logged into and authenticated Salesforce, and are now logging into a new environment for the first time, proceed to steps 9-16== **For any assistance, please email: covaxonsupport@ontario.ca**	⚠️ ***All COVID public health measures must be followed in alignment with this process.*** This document provides training on how to use the COVax_{ON} system for the vaccine management process. Within the clinical package that each site received, there are additional forms and documentation that you will need to use alongside the COVax_{ON} system.

This Job Aid Includes Steps for:

🔒 Setting up Two Factor Authentication for COVax_{ON}	➡️ Logging In to COVax_{ON}	➡️ Logging Out of COVax_{ON}	📍 User Access based on Authorized Organization

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🔒 **Two Factor Authentication Process for COVax_{ON}:**

1) On the provided iPad/computer/laptop, open either **Safari, Google Chrome or Microsoft Edge** browser applications.
   (***Note***: *Any of these 3 browsers are recommended to access COVax_{ON}*)

2) Using the search bar, enter the URL of your email provider (i.e. Gmail, UHN, Outlook, etc.)
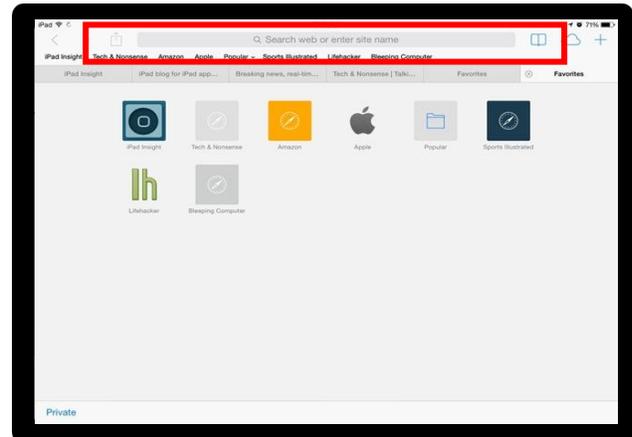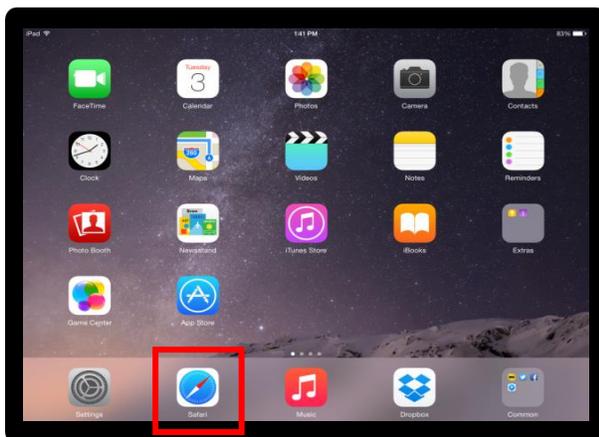
3) Log into your email account.

4) You will have one of the following emails from support@jp.salesforce.com. For the first email, copy the link in the email and paste it into a separate browser window

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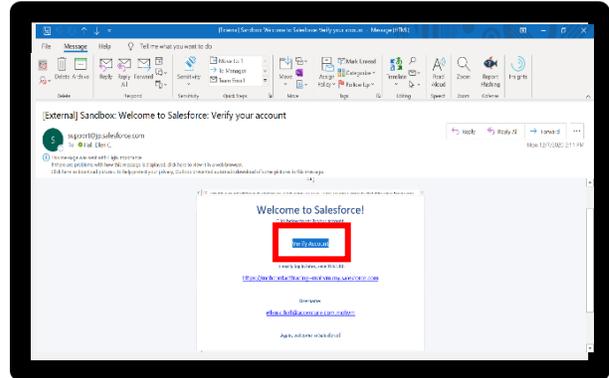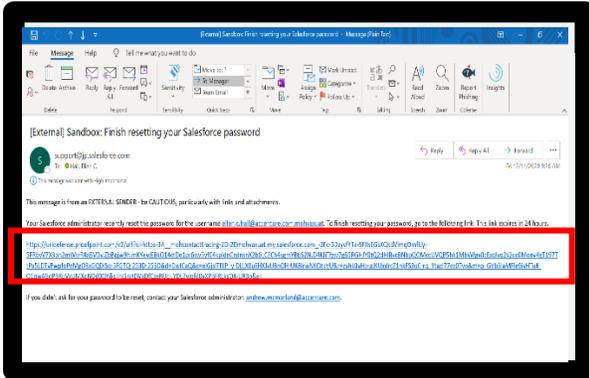
5) Once the link is pasted in your browser, hit enter to go to the URL
6) You will see the "Acceptable Use Policy". Scroll down to read through the policy. To agree to the terms, click the "**Finish**" button at the bottom.
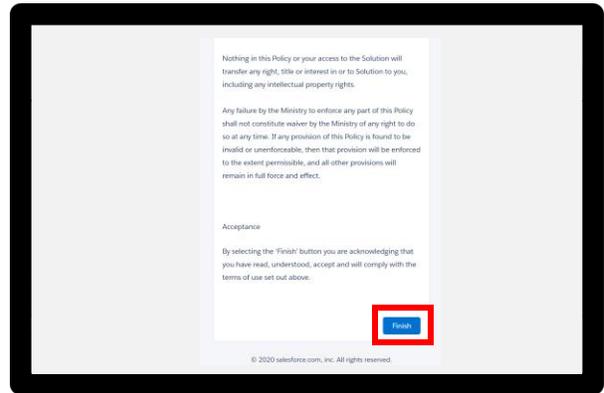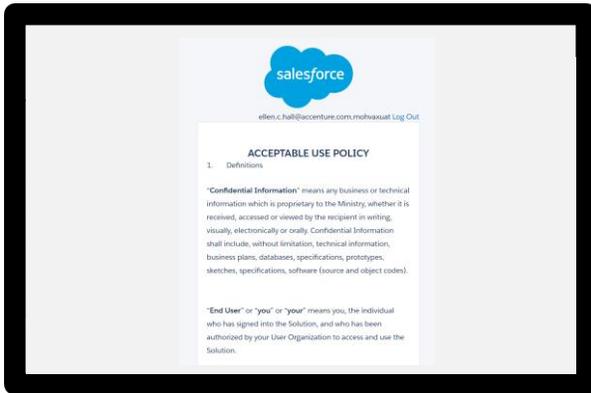
7) You will be directed to this screen. Do not exit this window. **Set the iPad/computer/laptop aside and grab your mobile phone.**
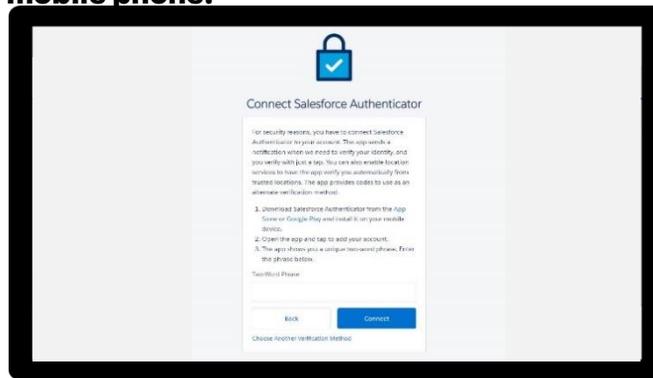
8) **On your mobile phone**, open either the Google Play (for Android or Pixel) or Apple App Store (for iPhone). *Note: if you have already gone through the registration process on the Salesforce Authenticator app, and see a 2-word phrase, skip to step 17 to add a new account.*
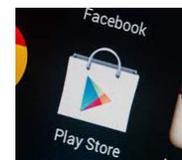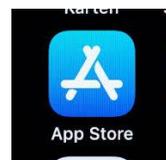
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Target Role: *All users of COVax_{ON} (Inventory Administrator, Clinician/Admin, Waiting Room Clinician & Vaccine Administrator)*

9) Using the search bar, type in "**Salesforce Authenticator**". Click on the title "Salesforce Authenticator"
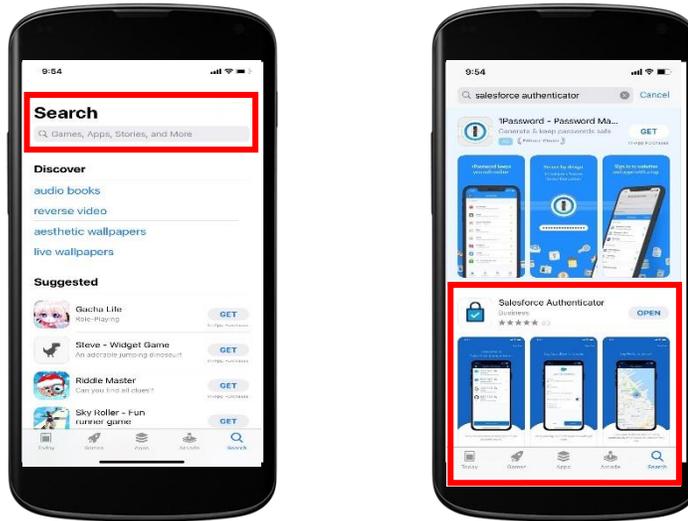
10) Select "**Get**". You may have to enter your Play Store / App Store credentials here.

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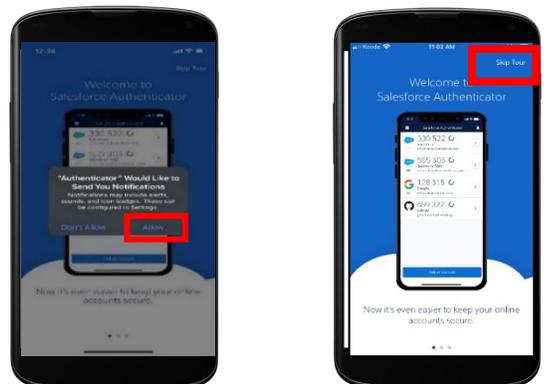
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14) Enter your mobile phone number using the keypad. Click the "**Send**" button to have Salesforce send you an automated SMS message.

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.
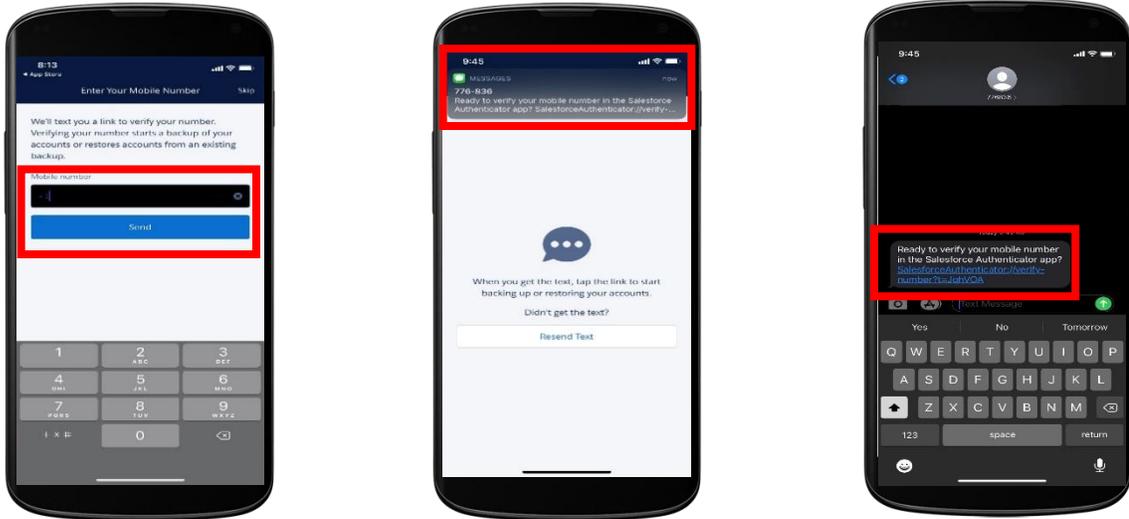
16) Once you click on the link, this window will open on your mobile phone. **Choose a 4-digit passcode**, and then **verify** that passcode by entering it in a second time.
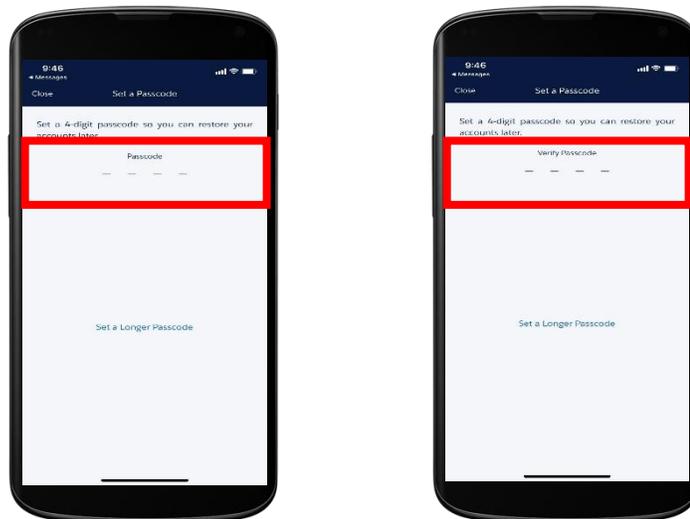
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17) You will see a green message at the top of your screen indicating that the passcode has been saved. Click the "**Add an Account**" button to continue. *Note: if you have already gone through the registration process on the Salesforce Authenticator app, and you are logging into a new environment, you can start here to by selecting **"Add an Account"***
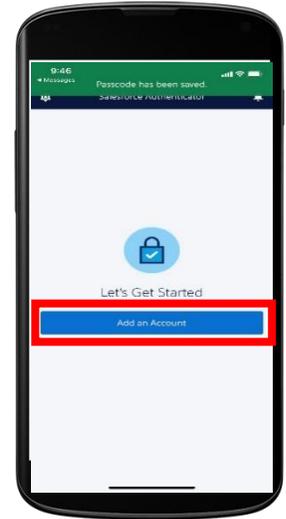
18) On your mobile within the Salesforce Authenticator app, you will see a **two-word phrase** provided.

19) **Put your mobile phone down. Using the iPad**, go back to the Safari window from step 7. Enter the two-word phrase in the box below.
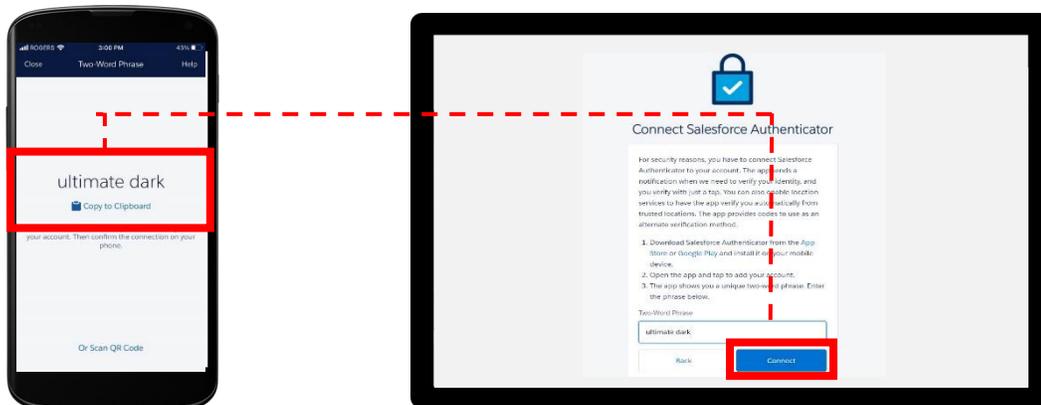
20) The following message will appear. Follow the prompt and **go back to your mobile device**.

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**".

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25) Using the iPad/computer/laptop, go back to the Safari 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}
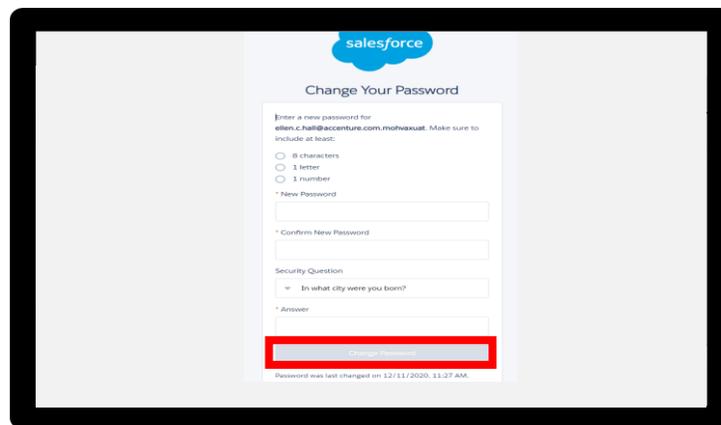
26) Once logged in, the COVax_{ON} home page will appear as follows:
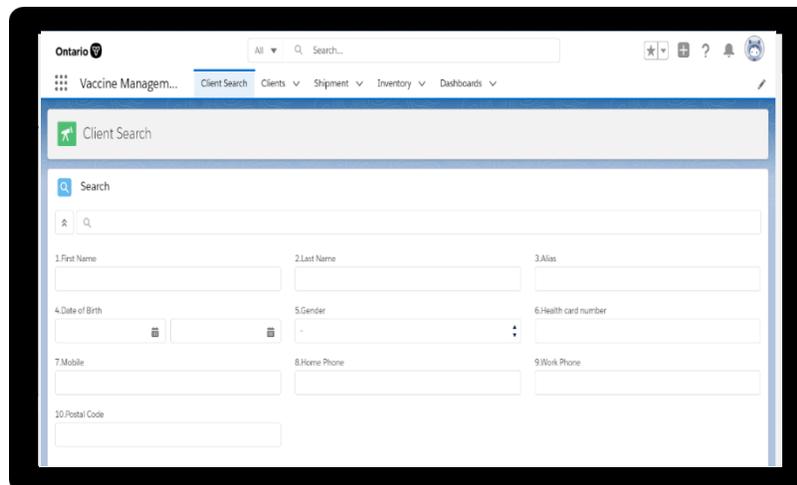
➡ **Logging In to your COVax_{ON} account:**

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1) If using an iPad on site, open COVax_{ON} using the installed application.
2) If using a desktop, open the browser (Safari, Google Chrome or Microsoft Edge) and go to the COVax_{ON} URL link
3) Enter your username and password credentials. Click "**Log In To Sandbox**"
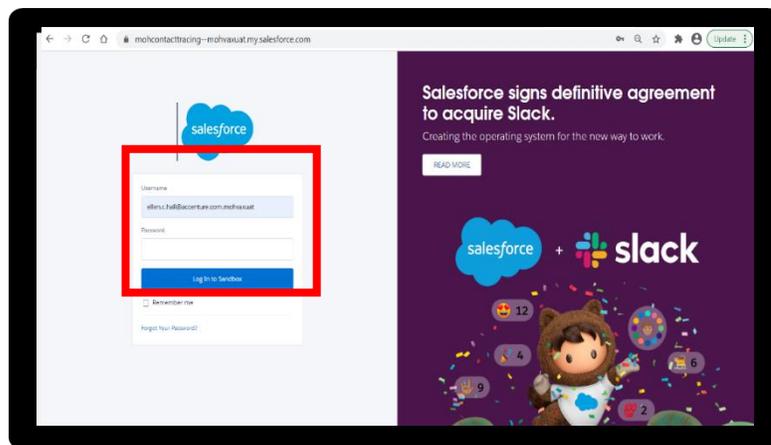
4) Again, you will see the "Acceptable Use Policy". Scroll down to read through the policy. To agree to the terms, click the "**Finish**" button at the bottom of the Acceptable Use Policy.
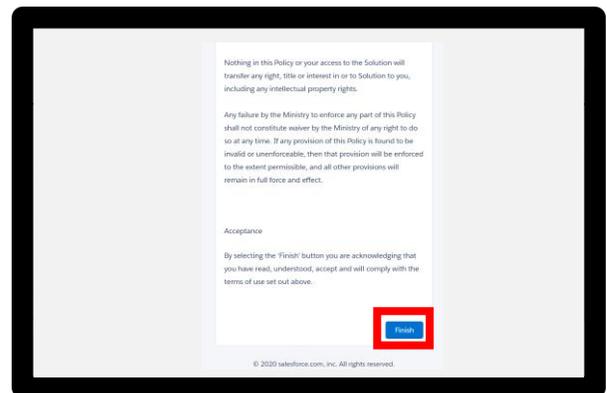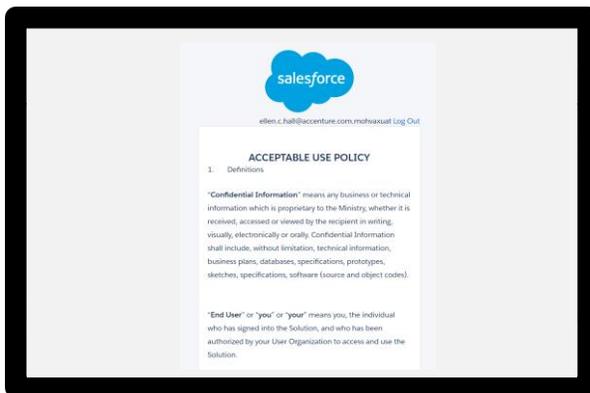
5) The first time you normally login, you will need to register your mobile device.
   - Ensure you change the country to be "**Canada**".
   - **Enter your mobile number,** Click "**Register**"
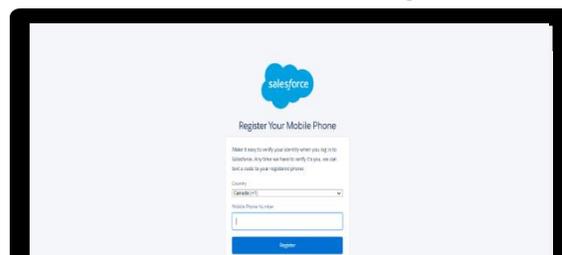
COVax_{ON} Comprehensive Login, Logout, User Settings

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

6) You will get a text message on your mobile with a verification code.
   - Enter this code on the iPad Screen.
   - Click "**Verify**".

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

7) On your mobile device, you will receive a request from the Salesforce Authenticator app.
8) Open the application and select "**Approve**".
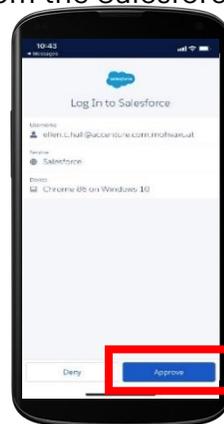
9) On the iPad/computer/laptop, you will be brought to the COVax_{ON} home page.
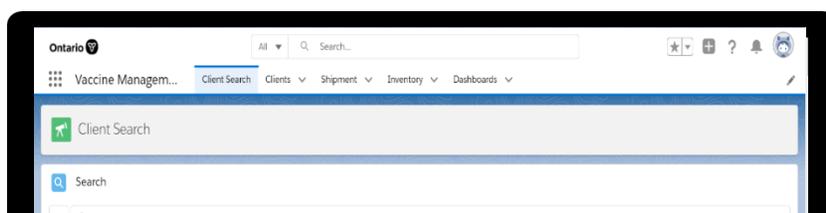
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10) After you practice in Salesforce in the training environment, COVax_{ON} will be moving to a "production environment". Therefore, you will need to add a new account to your authentication app. When you log back into Salesforce, you will hit "Add account". Then users can log into their new salesforce account, in the new environment. You may also need to "add an account" if you have two different COVax_{ON} login credentials.
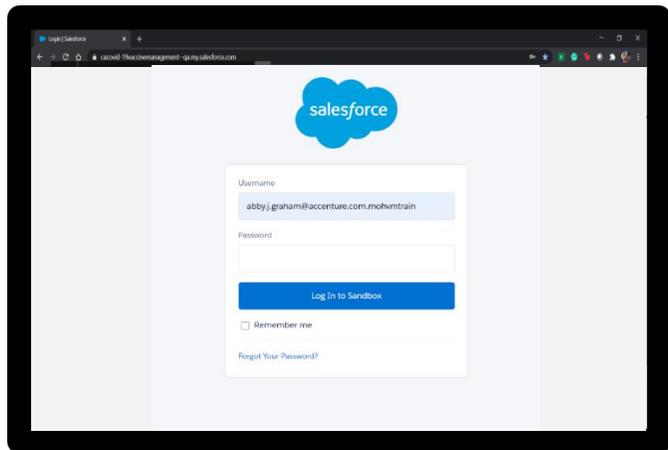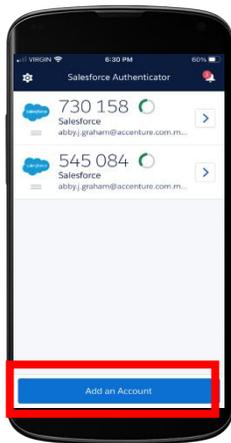
⇥ Logging Out of your COVax_{ON} account:

1. On the iPad/computer/laptop, from the home screen of COVax_{ON,} select the icon on the top right corner
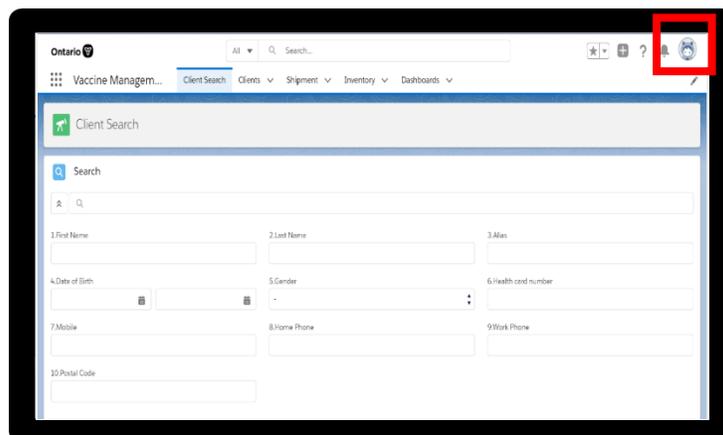
2. Select "Log Out"
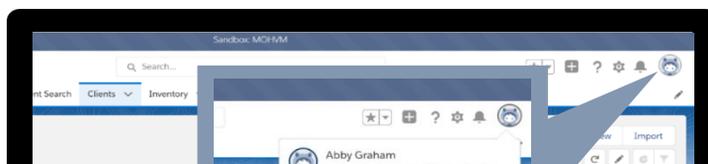
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3. Exit the Safari window
4. Open iPad/computer/laptop Settings and follow the steps to clear your browser history.
5. Sanitize shared devices according to individual site protocols and provide to on-site IT.

Section 2: User Setting Details

⊚ User Access based Authorized Organization

All Users are associated with a profile type and an Authorized Organization. This drives the ability for the User to perform activities within COVax_{ON} on behalf of that 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"
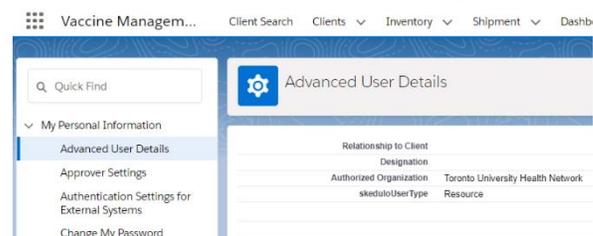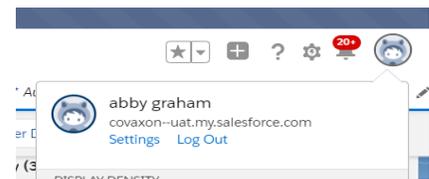
User Who Works at Multiple Authorized Organizations

- Users who work for more than one Authorized Organization will be granted separate login credentials for each Authorized Organization. If you require access to an additional Authorized Organization than what you currently have on your profile, you will need to contact the Site Lead of that Authorized Organization, so they can submit a request to the ITS team to grant you login credentials. The Site Leads are encouraged to regularly audit the list of Users and revoke access to any Users no longer working for their Authorized Organization. In the case that it is a secondary account, ensure to indicate that in the User template. Users with multiple accounts will use the same email for all accounts, but the username will be different, as per the below:
    - o **Account 1:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon
    - o **Account 2:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon2
    - o **Account 3:** FIRSTNAME.LASTNAME@emaildomain.com.covaxon3
- If a User is improperly mapped to an Authorized Organization and only works for one Authorized Organization, a request can be submitted by the Site Lead of the Authorized Organization to the Service Desk for the Authorized Organization to be changed.

User Profiles:

User Profile	Functionality	Reports
COVax_{ON} Inventory Manager	Create shipments, inventory, report wastage & excursion, manage recalls, link inventory to VEs, create and manage VEs	Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report

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COVax_{ON} Site Staff	Update client records, check-in clients, bypass client duplicate errors, create and manage VEs	Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report
COVax_{ON} Vaccinator	Update client records, check-in clients, document/update dosage administration, check-out clients, edit and change status of Dose Admin Records, Client Merge functionality, bypass client duplicate errors, create and manage VEs	No access to Reports
COVax_{ON} Site Super Users	Update client records, dosage administration, mass data client upload, edit and change status of Dose Admin Records, Client Merge functionality, link inventory to VEs, create and manage VEs	Read and Export Summary Client and Dose Administration Report & Vaccine Inventory Report
COVax_{ON} Dashboard User	View Site Dashboards, create and manage VEs	No access to Reports