

Overview of Vaccine Management in AVBS

Reference Guide – Health Care Providers and Provincial Operations

As of October 15th, 2021

Pharmacy Staff: For any guidance and/or technical support, please contact:

 1-844-705-1265

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 1-877-311-4300

 Alberta

Purpose Of This Document

This reference guide provides an overview of how Alberta’s vaccine administration is managed through the **AVBS**, a Salesforce-based tool that will provide a single, integrated and standardized platform to manage and track vaccine appointment bookings and administration.

Who Can Use This Document

- Health Care Providers
- Provincial Operations

Table of Contents

| Topic | Page No. |
|------------------------------------|----------|
| Alberta Vaccine Management in AVBS | 3 |
| AVBS Apps and Their Functions | 4- 6 |
| Overview of AVBS Profiles | 6 - 7 |
| BCH Profiles | 8 - 9 |
| End-to-End AVBS Processes | 10 |
| List of Training Materials | 11 – 12 |

Note: The term vaccination site used throughout the user guides refers to pharmacies, AHS clinics and physician offices.

Alberta Vaccine Management in AVBS

AVBS includes the following components: Albertan-facing **AVBS Vaccination Portal** that provides a self-managed experience for Registration and Booking; and the **AVBS Applications (Apps)** that provides an easy way to manage Registration and Booking on behalf of Albertans for Health Care Providers and Provincial Ops as well as to manage end-to-end booking at these vaccination sites.

The screenshot shows the 'COVID-19 Vaccination' portal with a 'Register now' heading. Below the heading is a sub-heading 'Register now' and a paragraph: 'Register online or by phone to be notified when you're eligible to book an appointment. After you register, you will receive a text, email or phone call when you are eligible to book a vaccine appointment.' There are two main options: 'Register online' with a 'Register now' button and 'Register by phone' with a 'Call Health Link 811' button. At the bottom, there are links for 'Jobs' and 'Staff directory' and the Alberta logo.

The Albertan-facing **AVBS Vaccination Portal** allows Albertans to register themselves and book their vaccination appointment using their personal information, such as Legal First Name, Legal Last Name, Preferred Name, Sex, Date of Birth, Address, Postal Code, Health Card Number, and Preferred Contact details.

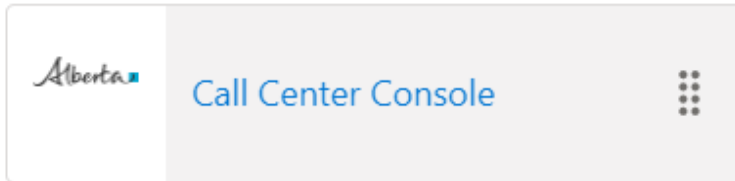
The screenshot shows the 'Person Account' for 'Mary White' in a 'Call Center Console'. The profile information includes: Health Card Number (221554458), Birthdate (1929-05-10), Preferred Communication Channel (Email), and Registration Confirmation Number (R-6RG8HYCW). The 'Details' tab is active, showing fields for Profile Name, Preferred Name, Gender (Female), Indigenous Person (checked), AB_IsEligible (checked), and Geographic Origin of Health Card Number (Prince Edward Island). On the right, there are buttons for 'Resend Registration Confirmation Notification', 'Verify PCR', and 'Check Eligibility'. Below these are 'Program Eligibilities (0)' and an 'Activities' section with an 'Email' button and a 'Compose' button.

The **AVBS Apps** are easy-to-use, intuitive, secure, digital tools to help manage vaccine administration from registering an Albertan and booking their appointment to checking them in and out at different vaccination sites.

Note: This reference guide will focus on the AVBS Apps and its functionalities.

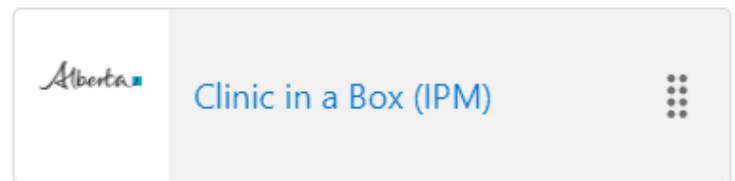
AVBS Apps & Their Functions

AVBS has **three main Apps** that you can use in the AVBS vaccine management program. Depending on your role and permissions in AVBS system, you may be required to use more than one of these three Apps. See below for a summary of each App to identify which App you need to be familiar with, according to your role.



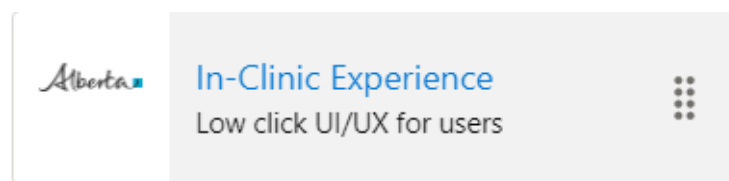
This App will be used by **Health Link 811 Call Center Staff** to manage Albertan registration to AVBS, managing their personal / contact information, checking their eligibilities and booking appointments.

(See next page for details)



This App will be used by **Health Care Providers** to manage Albertan registration to AVBS, managing their personal / contact information, checking their eligibilities and booking appointments. In addition, they can manage appointment blocks for vaccination sites and access reports through this App. **Provincial Operations** will have the same access as Health Care Providers.

(See next page for details)

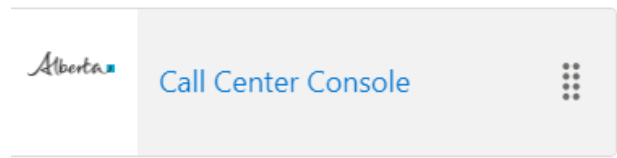
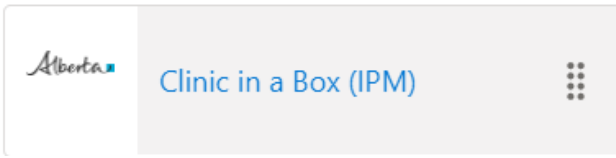


This App will be used by **Health Care Providers** to manage Albertan information in AVBS, as they go through check-in during vaccine administration. **Provincial Operations** will have the same access as Health Care Providers.

(See next page for details)

AVBS Apps & Their Functions (Continued)

See below for details on the activities that can be performed in each **App**.



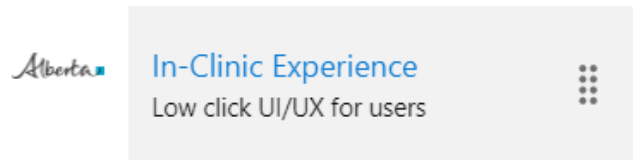
Health Care Providers & Provincial Operations

- **Registering Albertans in AVBS***
- **Searching for Albertan profiles in AVBS***
- **Scheduling appointments for vaccination***
- **Updating Albertan's personal and contact information***
- **Cancelling / rescheduling vaccination appointments***
- **Managing Appointment Day**
 - Appointment blocks can be set up and managed for a vaccination site, depending on the capacity and the lot available at the vaccination site
 - Managing appointments due to supply disruption
- **Reporting**
 - Reports can be viewed and exported, based on permissions for each AVBS role

* This functionality reflects the same workflows as in Call Center Console. This is the App where Health Care Providers and Provincial Ops would perform these tasks.

Call Center Staff

- **Registering Albertans in AVBS**
 - Personal information (Legal First Name, Legal Last Name, Preferred Name, Sex, Date of Birth, Address, Postal Code, Health Card Number (HCN)) and contact information (email address, phone / mobile number) of Albertans can be entered in AVBS to register them for their vaccination
- **Searching for Albertan profiles in AVBS**
 - Legal First Name, Legal Last Name, HCN and Registration Confirmation Number can be used to search for an Albertan's profile
- **Scheduling appointments for vaccination**
 - Registered Albertans can be checked for eligibility and booked for vaccination
- **Updating Albertan's personal and contact information**
 - An Albertan's information can be updated in their existing AVBS account.
- **Cancelling / rescheduling vaccination appointments**
 - Confirmed bookings for vaccination can be cancelled, and rescheduling can be done simultaneously.



Health Care Providers & Provincial Operations

- **Checking-in Albertans**
 - Either scan the QR Code that the Albertan brings with them to check-in or search for the client, and check them in

Overview of AVBS Profiles



811 Staff are responsible for **registering Albertans, scheduling their appointments** and answering Immunization related questions.

- 811 Staff will be given **BCH Call Center (Call Center Staff in IAM) Profile**.
- Joint Role of 811 & Public Health Staff will be given **BCH Clerk (Health Care Staff in IAM) Profile**.



Health Care Providers (Pharmacy, AHS Sites Staff, and Physician Office staff) are the individuals who help manage a vaccination site (or multiple sites) within a region and are responsible for a broad range of activities. They will have access to all the functionalities that a Call Center Staff has access to, plus the ability to create and manage appointment availability and their associated vaccine type.

- Pharmacy Staff and Admins, and AHS Public Health Schedulers will be given **BCH ImmsBC Admin (Health Care Provider in IAM) Profile**.
- AHS Public Health Administrative Staff will be given **BCH Clerk (Health Care Staff in IAM) Profile**.



Provincial Operations Admins are “super users.” They will have access to all the functionalities that a health care provider has access to, plus the **ability to configure reports** (based on access). Their role consists of managing ad-hoc activities required in AVBS at the provincial level, such as report configuration.

- 811 Supervisors & Managers, AHS Public Health Managers and Directors, eHSS Staff, Alberta Health On Call, AHS Public Health Schedulers, and AHS Public Health Managers and Directors will be given **BCH PPHIS Operations (Provincial Operations Manager in IAM) Profile**.
- eHSS or AHS Tier 1 will be given **BCH PPHIS Operations Read Only (Community Support Staff in IAM) Profile**.
- Transactional Audit Staff, AHS/AH Business Managers & Executives will be given **BCH PPHIS Operations Read Only with Reports (Provincial Read-Only & Reporting in IAM) Profile**.

BCH ImmsBC Admin Profile

As **Pharmacy Staff and Admins, and AHS Public Health** with **BCH ImmsBC Admin Profile**, you will have access to the Clinic-in-a-Box application where you will be able to:

- Register an Albertan
- Modify fields on the Albertan record (those that are applicable)
- Book appointments on an Albertan's behalf
- Create and edit Appointment Day Management and Appointment Block Times
- Create list views
- Create and Edit schedules through the Facility appointment scheduler
- Edit "Available Vaccines" field
- View only (not create or edit) for Facility, Facility Address, Appointment Type, Rules Engine Response, Episode, Territories, Knowledge

and the In-Clinic Experiences application where you will be able to:

- Check-in Albertans

Note: You will not be able to edit tasks or access Reports or Dashboards with this profile.

BCH Clerk Profile

As **AHS Public Health Admin Staff** with **BCH Clerk Profile**, you will have access to the Clinic-in-a-Box application where you will be able to:

- Register an Albertan
- Modify fields on the Albertan record (those that are applicable)
- Book appointments on Albertan's behalf
- Create list views
- View only (not create or edit) for Facility, Facility Address, Appointment Type, Rules Engine Response, Episode, Territories, Knowledge

and the In-Clinic Experiences application where you will be able to:

- Check-in Albertans

Note: You will not be able to edit tasks or access Reports or Dashboards with this profile.

Note: *If you have access to multiple facilities, you will be prompted to select the location that you are working at for that day. Even though you might have access to multiple facilities, do not log into a facility that you are not physically at.*

BCH PPHIS Operations Profile

As **AHS Public Health Managers and Directors** with **BCH PPHIS Operations Profile**, you will have access to the Clinic-in-a-Box application where you will be able to:

- Register an Albertan
- Modify fields on the Albertan record (those that are applicable)
- Book appointments on an Albertan's behalf
- Create and edit Appointment Day Management and Appointment Block Times
- Create list views
- Create and Edit schedules through the Facility appointment scheduler
- Edit "Available Vaccines" field
- View only (not create or edit) for Facility, Facility Address, Appointment Type, Program Eligibility, Rules Engine Response, Episode, Territories, Knowledge
- Create, edit, extract access to new and existing reports
- Create and edit access to new and existing dashboards

and the In-Clinic Experiences application where you will be able to:

- Check-in Albertans

Note: You will not be able to edit tasks with this profile.

BCH PPHIS Operations Read Only with Reports Profile

As **AH and AHS Business Managers and Executives** with **BCH PPHIS Operations Read Only with Reports Profile**, you will have access to the Clinic-in-a-Box application where you will be able to:

- View only on an Albertan record
- Create list views
- View only (not create or edit) for Facility, Facility Address, Appointment Type, Program Eligibility, Rules Engine Response, Episode, Territories, Knowledge
- Create, edit, extract access to new and existing reports
- Create and edit access to new and existing dashboards

End-to-End AVBS Process

The following are the current **AVBS roles** ...



CALL CENTER STAFF

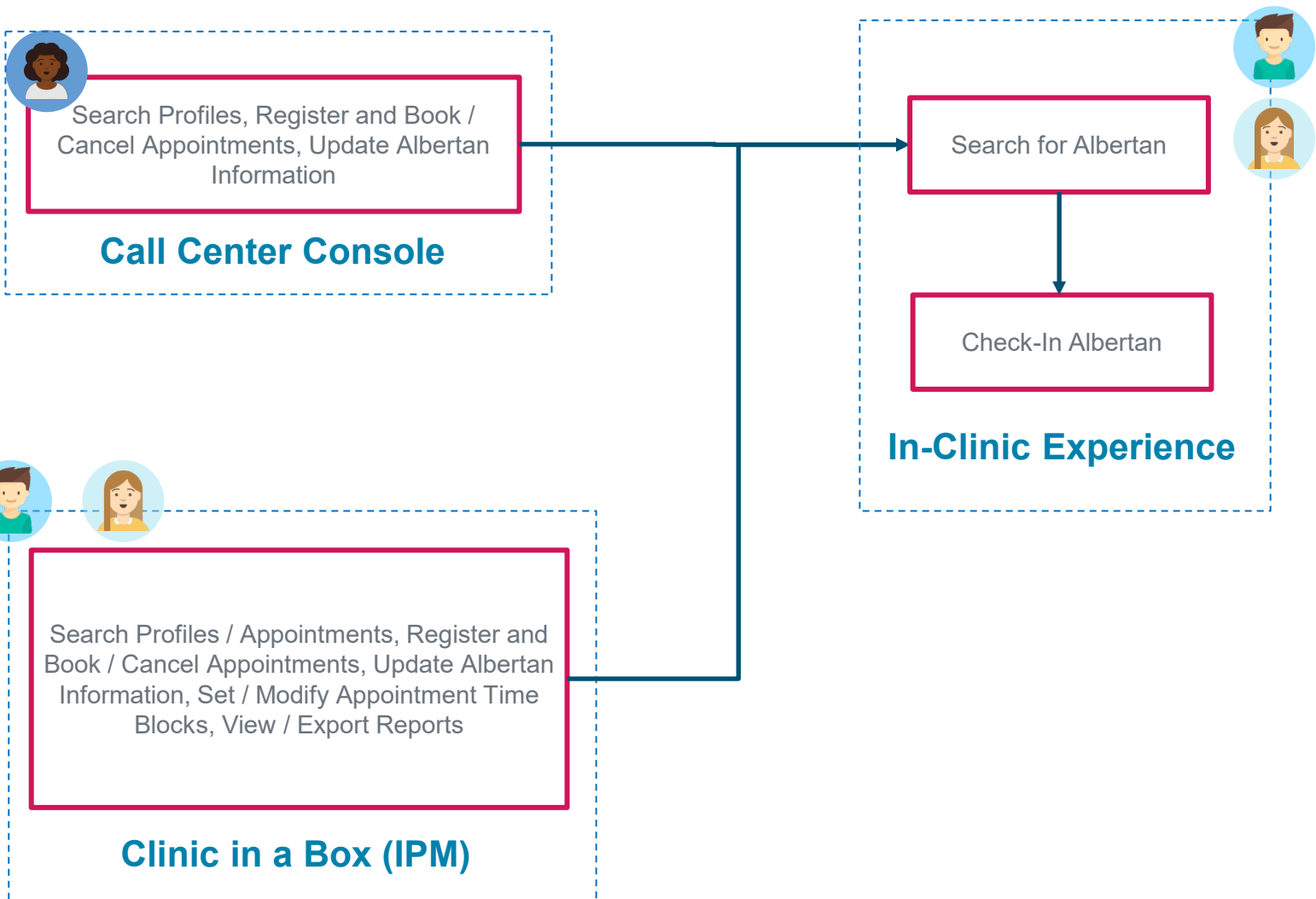


HEALTH CARE PROVIDER



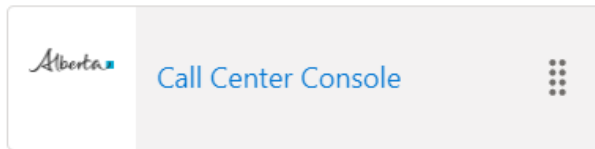
PROVINCIAL OPERATIONS

... and the following are the key functionalities that these roles can perform in the different **AVBS Apps**:

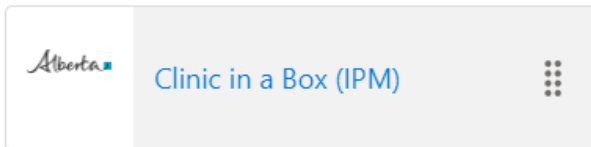


List of Training Materials

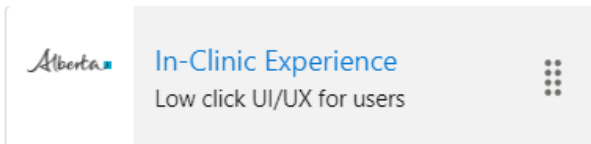
The training materials provided include User Guides, Reference Guides, Frequently Asked Questions (FAQs), and Video Capsules to help use the AVBS system. **You should review the [Basic Navigation](#) user guides first.**



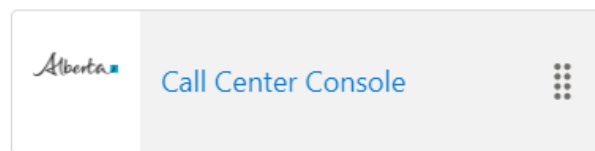
- Call Center Staff [Basic Navigation](#)



- Health Care Providers and Provincial Ops [Basic Navigation](#)



The following are other user guides available:



- Call Center Staff_ How to [Register a Caller](#)
- Call Center Staff_ How to [Book a Vaccination Appointment](#)
- Call Center Staff_ How to [Reschedule/Cancel a Vaccination Appointment](#)
- Call Center Staff_ How to [Resend Registration or Booking Confirmation to a Caller](#)
- Call Center Staff_ How to [Update Personal and Contact Information of a Caller](#)
- Call Center Staff_ How to [Manage Call Backs in AVBS](#)
- Call Center Staff_ [List Views in AVBS](#)

List of Training Materials (Continued)

Alberta

Clinic in a Box (IPM)



- Health Care Providers and Provincial Ops_ How to [Register an Albertan](#)
- Health Care Providers and Provincial Ops_ How to [Book a Vaccination Appointment](#)
- Health Care Providers and Provincial Ops_ How to [Reschedule/Cancel a Vaccination Appointment](#)
- Health Care Providers and Provincial Ops_ How to [Resend Registration or Booking Confirmation to an Albertan](#)
- Health Care Providers and Provincial Ops_ How to [Update Personal and Contact Information of an Albertan](#)
- Health Care Providers and Provincial Ops_ [Overview of Scheduler](#)
- Health Care Providers and Provincial Ops_ How to [Manage Appointment Blocks Using Scheduler](#)
- Health Care Providers and Provincial Ops_ How to [Manage Vaccine Supply Disruption](#)
- Health Care Providers and Provincial Ops_ [How to Create List Views for Vaccine Supply Disruption](#)
- Health Care Providers and Provincial Ops_ [How to Update Facility Information](#)
- Health Care Providers and Provincial Ops_ [Reporting in AVBS](#)
- Health Care Providers and Provincial Ops_ [Lists Views in AVBS](#)

Alberta

In-Clinic Experience

Low click UI/UX for users



- How to [Manage Check-in](#)

The following are other training materials available:

- AVBS Reference Guide_ [Overview of Registration Through Albertan Portal](#)
- AVBS Reference Guide_ [Overview of Appointment Booking Through Albertan Portal](#)
- Frequently Asked Questions (FAQs)
- Video Capsules