health
Department:
Health
REPUBLIC OF SOUTH AFRICA

User Manual

:

Electronic Vaccination Data System

CONTENT

PREFACE

This manual aims to provide the reader with step-by-step guidance on the use of the complete system functionality of the Electronic Vaccination Data System (EVDS).

The organisation, section layout and interpretation of the information provided herein are explained before commencement of the instructional content. Providing the reader with an understanding as to how the content link to- and follow on each other will allow him/her the opportunity to extract optimal value from the manual and ensure maximum understanding of the content.

MANUAL ORGANISATION

The manual is divided into multiple *Chapters* with each chapter focusing on a specific set of system functionality. Chapters may be sub-divided into *Lessons* which concentrates on a sub-set of the functionality covered by the chapter.

Certain chapters require the user to be familiar with system functionality that is covered in another chapter. While every effort has been made to ensure that chapters follow each other in a logical order, it is advisable that the user ensure that they've completed all the chapters and/or lessons that are listed as prerequisites before starting a new chapter.

Chapter Layout

Each chapter starts with an information block (Figure 1) indicating the *Applicable User Profile(s)* needed to access the *System Functionality* that is covered in the chapter. Any *Prerequisite Chapters/Lessons* is also listed here.

Applicable User Profile(s):	
System Functionality Covered:	

Figure 1: Information Block at the beginning of each Chapter

System functionality covered by the chapter is then explained using step-by-step instructions. Where needed, instructions and functionality are divided into smaller, more manageable lessons in order to keep it concise and understandable. When applicable, an information block, similar to that in Figure 1 will be provided for each lesson.

Fonts and Colours Used

Various fonts and colours may be used to assist with the distinction between field names, links, buttons and page names.

- Italic, "*Vrinda*" font type is used to indicate a *Field Name* that can be found on the page in question.
- Italic and underlined "*Vrinda*" font type is used to indicate a clickable *link* or *menu item* that is present on the page in question.
- The *<name of a button>* will be indicated with italic, bracketed *"<Vrinda>"* font type.
- The **Name of a Page** will be indicated using bold, "**Vrinda**" font.
- [References to other lessons or chapters] will be indicated with square brackets and highlighted grey.

CHAPTER 1 Introduction

This chapter is aimed at providing the user with the necessary background to- and information on the system that is required to achieve a basic understanding of the need for and intended purpose of the Electronic Vaccination Data System (EVDS).

Applicable User Profile(s):	All
System Functionality Covered:	• System Background • System Overview and Intended Purpose • Organisation Unit Structure and User Profiles • General System Usage

System Background

The Electronic Vaccination Data System was developed in answer to the need for an Electronic Vaccination Data System to curb the spread of COVID 19.

High-level System Overview and Intended Purpose

The EVDS consists of a central data repository and requires internet connectivity to allow for secure communication and data exchanges.

The system assists vaccinators at vaccine sites to record patient vaccinations.

Basic system functionality include, but are not limited to:
- Verify the identity of each patient that visits a vaccine site.
  - Visual verification of a patient's identity will be performed whenever a valid identification document is presented.
- Update patient details
- Capture patient consent
- Record patient vaccination

Organisational Unit Structure and User Profiles

Access to system functionality is governed according to the Organisational Unit Structure together with the User Profile assigned to a user's account.

User Profiles

The system has been configured with default user profiles. These profiles have been selected to group certain roles and system functionality together. The default user profiles together with their assigned roles and system functionality can be found in Appendix A:User Profiles and Associated Functionality.

Organisational Units

The system allows for the creation of user accounts at different organisational units (or levels). Organisation units are hierarchical which means that a user assigned to a specific unit will have access rights to all the units on a lower level.

- National
- Provincial
- District
- Sub-district (ward)
- Facility

This means that users on a *National* level will have access rights (restricted by the assigned access profile) to data on *National*, *Provincial, District*, *Sub-district* and *Facility* levels. However, users on a *Sub-district* level will only have access to data for their specific *sub-district* and the associated *facilities*.

General System Usage

The system stores personal details of all patients that received vaccinations at identified facilities across South Africa. As it is of utmost importance that patients' details be kept confidential at all times, it is strongly advisable that an EVDS user should:

- Always log out of the EVDS whenever leaving his/her workstation.
- Keep his/her EVDS password a secret and do not distribute it to other users.
- Not make use of any password saving or auto login capabilities provided by web browsers.
- Not allow unauthorised users to work on the system.

CHAPTER 2 Getting Started

Applicable User Profile(s):	All
System Functionality Covered:	• Starting the EVDS • Obtaining an user account • Log in to the EVDS • Manage own user account

Lesson 1:   Starting EVDS

The EVDS is an online system, accessible at evds.health.gov.za, and can be accessed from any computer with a working internet connection, via the Chrome web browser.

➤ **EVDS Landing Page**

Upon starting the EVDS (using the method described above) the **EVDS Landing Page** will be displayed.
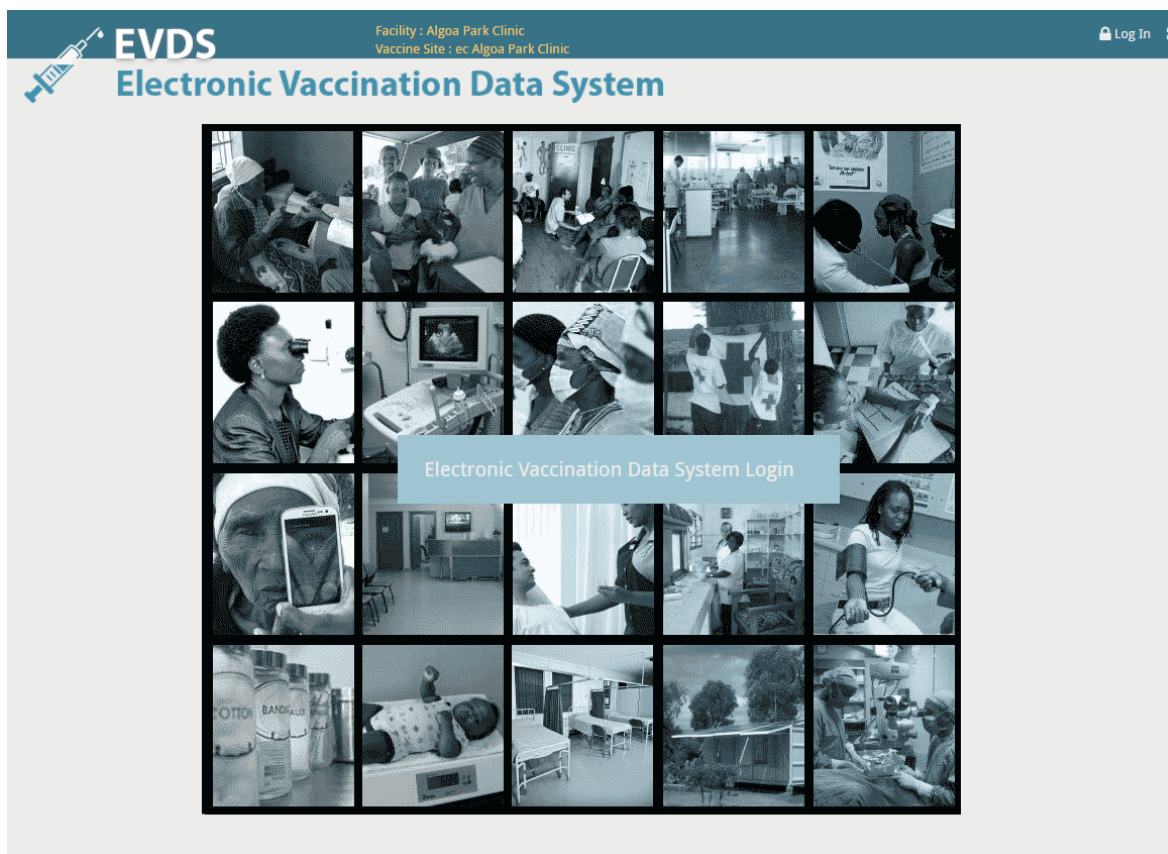
- The name of the facility (and selected vaccine site) at which the work station is registered is displayed in yellow at the top, middle of the page.

- The *<Electronic Vaccination Data System Log In>* button or *Log In* link provided can be used to log into the EVDS

Lesson 2:   Obtaining a User Account

In order to use the system, each user should obtain their own user account. To obtain a user account you can either:
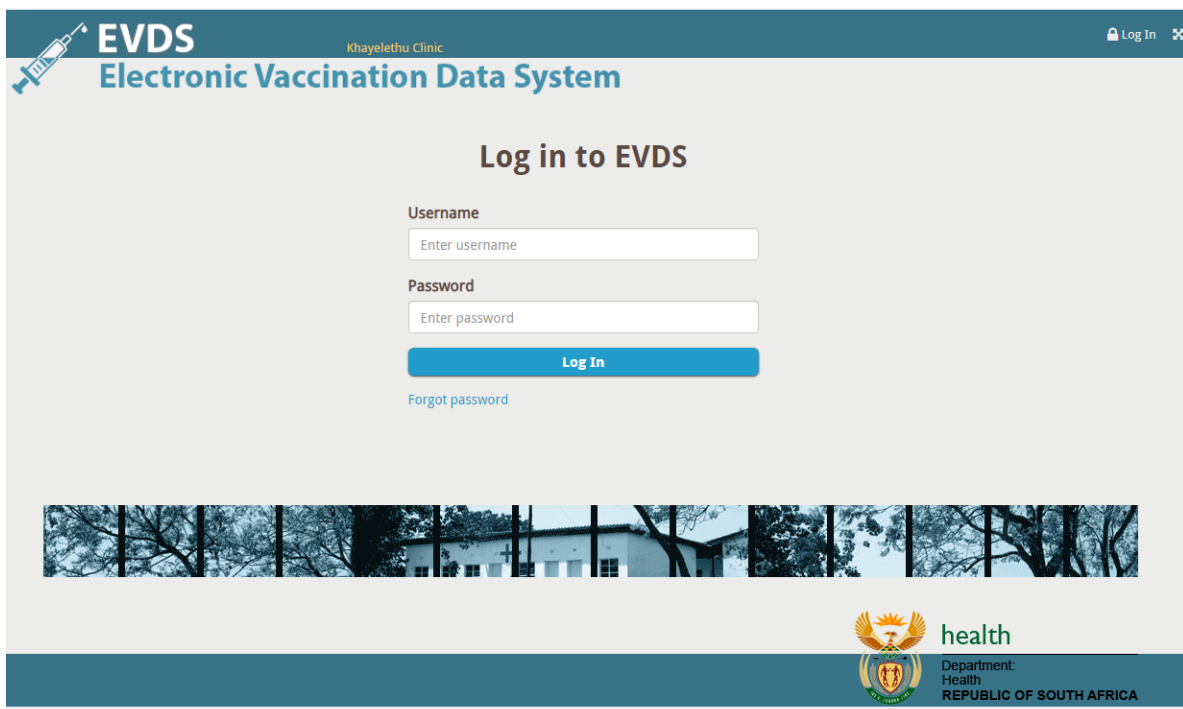
➢ Request a user account from your assigned Account Creator (each province or private sector group has dedicated "Account Creator" and "Account Approver" users); or
➢ Submit a request to EVDS service centre

Lesson 3:   Log in to EVDS

The **Login Page** can be accessed from the **EVDS Landing Page** by making use of the *Log In* link or *<Electronic Vaccination Data System Log In>* button provided.

Access to the EVDS system is restricted and requires a unique username and password combination. Your username and password will provide you with access to predefined system functionality.

The **Login Page** will prompt you for your assigned *Username* and *Password* as in the figure below.

Enter your username and password in the fields provided and click on *<Log In>*.

The system will now verify your username and password. Upon successful login, you'll be redirected to the **EVDS Home Page**.
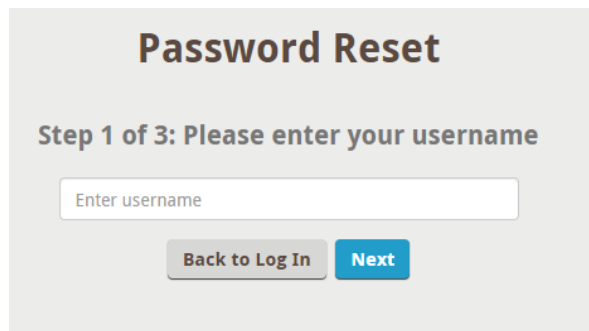
➢ **Reset Your Password**

In the event that you cannot remember your chosen password, click on the *Forgot Password* link below the *<Login>* button on the login page.

Note that the functionality to reset your own password will only be available if you have an active EVDS account, and you have previously provided answers to the security questions.

You can click on *<Back to Log In>* at any time during this process should you decide not to continue with the password reset.

- Step 1: Enter your EVDS username in the field provided and click on *<Next>*.
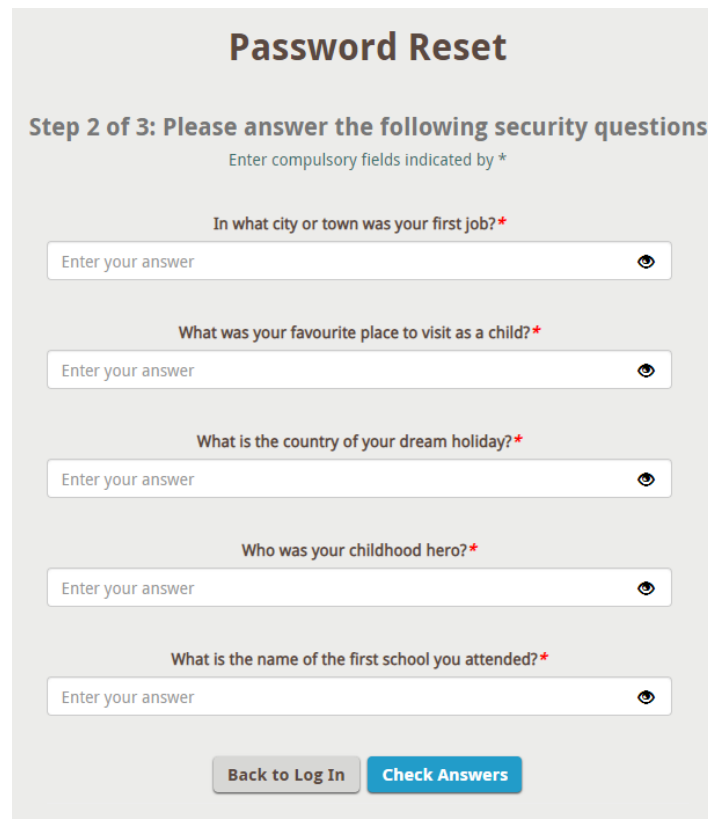
Password Reset

Step 1 of 3: Please enter your username

| Enter username |

Back to Log In | Next

- Step 2: Provide the answers, matching those that you have previously provided for the security questions and click on *<Check Answers>*

The system will allow the user to change their password if at least three of the five answers are entered correctly.

Password Reset

Step 2 of 3: Please answer the following security questions
Enter compulsory fields indicated by *

In what city or town was your first job? *

| Enter your answer |

What was your favourite place to visit as a child? *

| Enter your answer |

What is the country of your dream holiday? *

| Enter your answer |

Who was your childhood hero? *

| Enter your answer |

What is the name of the first school you attended? *

| Enter your answer |

Back to Log In | Check Answers

- Step 3: Choose and enter your new password (*New Password* field) and confirm it by re-entering the same password it in the *Confirm new password* field. Click on *<Change Password>* when you're done.

Password Reset

Step 3 of 3: Please enter and confirm your new password

Password Policy
▸ Must be a minimum length of 6 characters
▸ Must contain at least 1 lowercase letter
▸ Must contain at least 1 uppercase letter
▸ Must contain at least 1 number
▸ Must contain at least 1 symbol
▸ May not contain your first name or surname
▸ Password may only be reused after 30 unique passwords
▸ Password must be changed every 180 days

New password   [Enter new password]

Confirm new password   [Enter new password again]

[Back to Log In] [Change Password]

You can now enter your username and new password on the login page to access the system.

➢ **EVDS Home Page**

The **EVDS Home Page** is the default screen after a successful logon to EVDS. The page and available menu items might look slightly different depending on the access rights (or user profiles) of the logged on user.
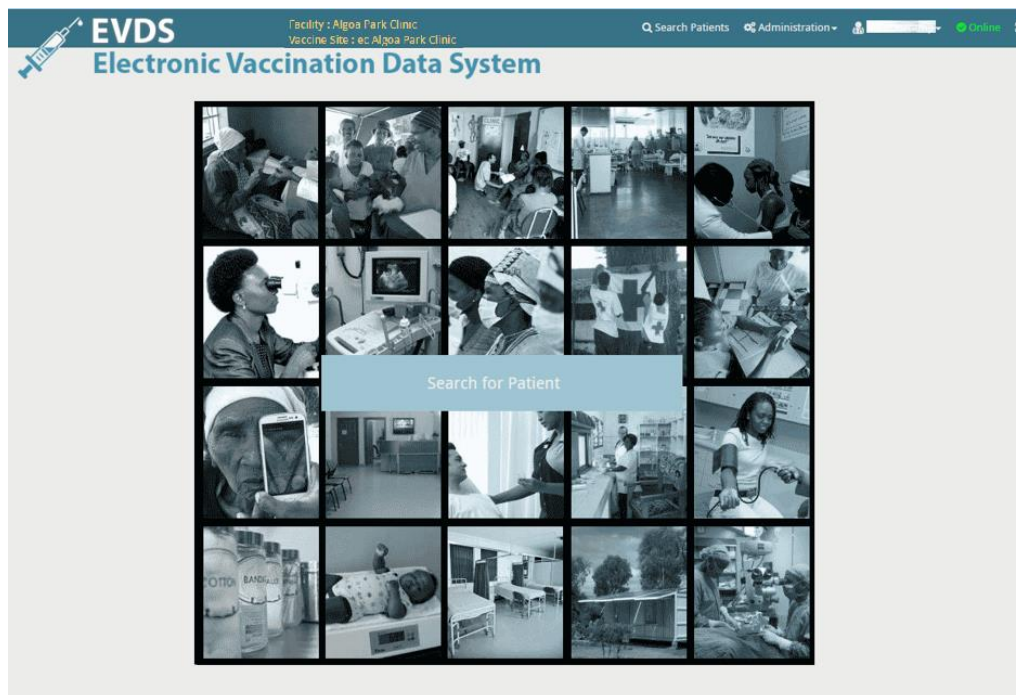
- The **EVDS Home Page** provides the user with menu items to access all their authorised system functionality.
- Applicable menu items can be found at the top right hand side of the page.

➢ **First Time Login**

When you log into the system for the first time after

   1) you have received your new account; or
   2) your password has been reset; or
   3) your account has been re-activated,

the system will display a red notification at the top right of the page requesting you to change your account password. A message will also be shown at the top centre of the system informing that you should update your password.
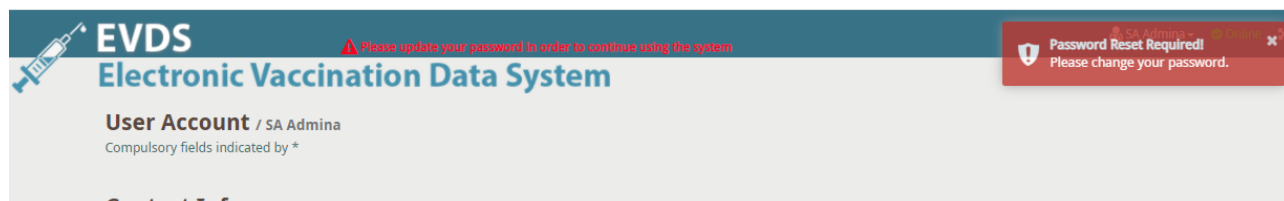
To change your password, scroll down to the "Change Password" section.

- Provide your current password in the *Old Password* field (for a new account or after a password reset, this value will be the password provided to you via email, by service desk / your account representative).

- Enter a new password of your choice in the *New Password* field (ensure that this password adheres to the "password policy" displayed on the right of the screen)

- Confirm your chosen password by re-entering it in the *Confirm New Password* field.

- When you click on *<Update Password>* to apply the password change, a green notification will be displayed at the top right of the screen to indicate success.

- If you have not previously provided answers to the security questions, the system will require you to answer these questions. Provide all the answer and click on *<Save>*.

Security Questions for Self-service Password Reset
Compulsory fields indicated by *

In what city or town was your first job? *

What was your favourite place to visit as a child? *

What is the country of your dream holiday? *

Who was your childhood hero? *

What is the name of the first school you attended? *

🔒 Save

➢ **Accessing Online Help**

The latest version of this User Manual can be accessed at any time by navigating to the *Help* menu item which can be found under the logged in username displayed at the top right hand side of the user's **Home Page**.

➢ **Log out of EVDS**

To end the current user session, log out of the system by navigating to the logged in username at the top right hand side of the page and select *Log out*.

➢ **Multiple logins**

EVDS user accounts are unique and are assigned to an authorised individual. When a user logs in with a username and password, all other active user sessions using the same credentials will be terminated.

This means that if users attempt to share a user account, only one user at a time will be allowed to use the system.
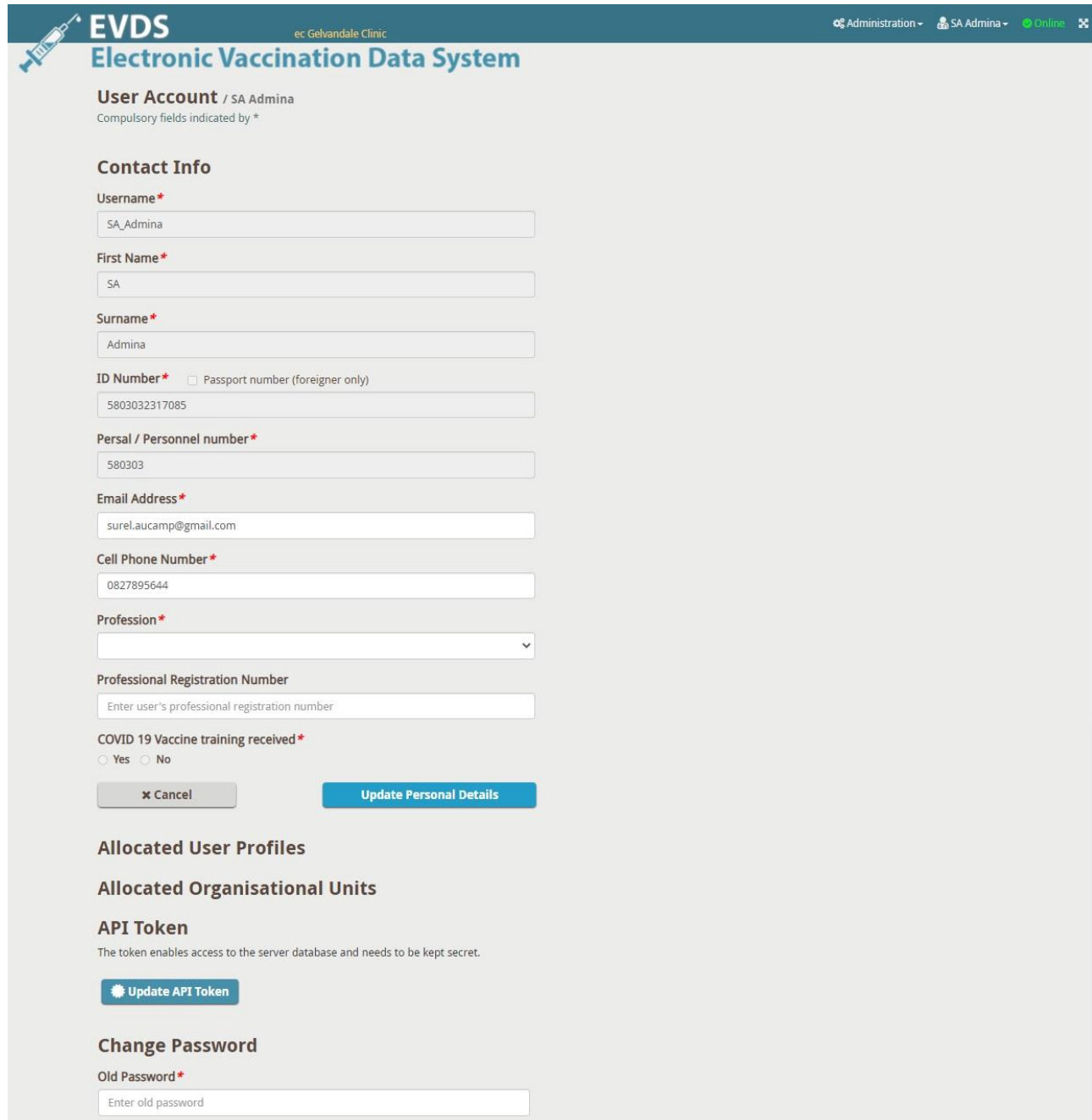
The figure below shows the user being logged out and a message being displayed informing the user that EVDS is currently used on another tab (and or machine).
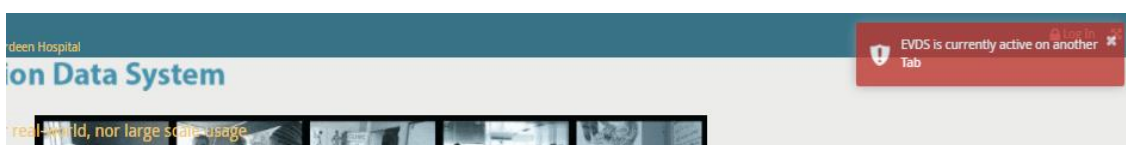
Lesson 4:   Manage Own Account

There are certain settings that each user can customise for his/her own account. These settings can be accessed from the *Edit Profile* menu item which can be found under the logged in username displayed at the top right hand side of the user's **Home Page**.

The **User Account** page provides users with the functionality to update their personal details, change their account password, or update answers to their security questions. Users can also view their own *Account Status History*.

> ➤ **Updating Personal Details**

The *Contact Info* section of the **User Account** page allows the user to change their personal information.

- Modify any of the *Contact Info* information by editing the text in the fields provided.
- Note that the *Username, First Name, Surname, ID Number* and *Persal / Personnel number*

fields are greyed out as it is not possible to edit these.

- Click on the *<Update Personal Details>* button to apply the changes to your account or select the *<Cancel>* button to discard any changes that was made to the personal information.

> **Changing Own Account User Password**

The *Change Password* section of the **User Account** pages allows the user to change their own password.

- Type your current (old) password in the *Old Password* field.

- In the *New Password* field, type the password that you would like your account password to be changed to. The password provided here should:

    o Be a minimum of 6 characters;

    o Not be the same as the old (or current) password as provided in the *Old Password* field.

    o Not be the same as any of the 30 passwords used before.

    o Contain at least one character each from the four available character types:

        – Lowercase letters

        – Uppercase letters

        – Numbers

        – Symbols

    o Not contain the user's first name or surname.

    o Must be changed every 180 days.

- In the *Confirm New Password* field, retype the password that you provided in the *New Password* field.

- Click on the *<Update Password>* button at the bottom of the section to apply the password changes that was made or select *<Cancel>* to discard the changes.

- When you click on *<Update Password>* to apply the password change, a green banner will be displayed across the screen. Dismiss the banner by clicking on the small cross provided on the right hand side.
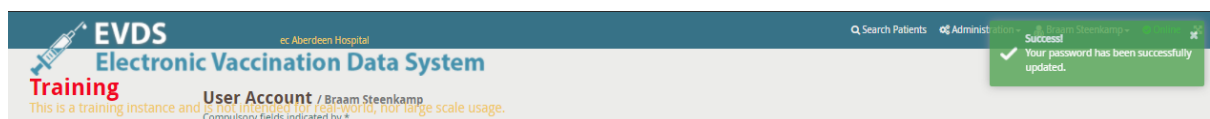
➢ **Update answers to security questions**

To provide answers to the security questions (or edit existing answers), click on *<Add / Edit Answers>* below the Change Password section.

• Provide the answers to the security questions and click *<Save>* to apply the changes or *<Cancel>* to go back.

Security Questions for Self-service Password Reset
Compulsory fields indicated by *

There are existing answers to the following security questions. Saving new answers will overwrite the existing answers.

In what city or town was your first job?*

What was your favourite place to visit as a child?*

What is the country of your dream holiday?*

Who was your childhood hero?*

What is the name of the first school you attended?*

x Cancel   🔒 Save

CHAPTER 3 Setting Up The System

This chapter focusses on the setup and configuration of the EVDS system as well as each individual work station used to access the system. Setup activities described here are mandatory to ensure a fully configured and operational system.

Lesson 5:   User Account Management

Applicable User Profile(s):	• Account Creator • Account Approver • Account Curator • System Administrator
System Functionality Covered:	• User account creation • User account approval • Reset account password • Deactivate an account • Reactivate an account • Search for accounts belonging to facilities other than your own

Authorised system users will be responsible for creating user accounts as needed by system users.

To create an account, log into EVDS using an *Account Creator, Account Curator, or System Administrator* profile and navigate to *Administration→User Accounts* from the **Home Page**.

All existing user accounts that are associated with the logged in user's organisational unit are displayed on the **User Accounts** page. From this page it is possible to search for accounts, view existing accounts by status, edit user accounts or create new user accounts.

Note that, when viewing accounts, the logged in user can only see the accounts that are linked to his facilities. See [Search Accounts belonging to facilities other than your own] further down to search for accounts that are not currently linked to your facilities.
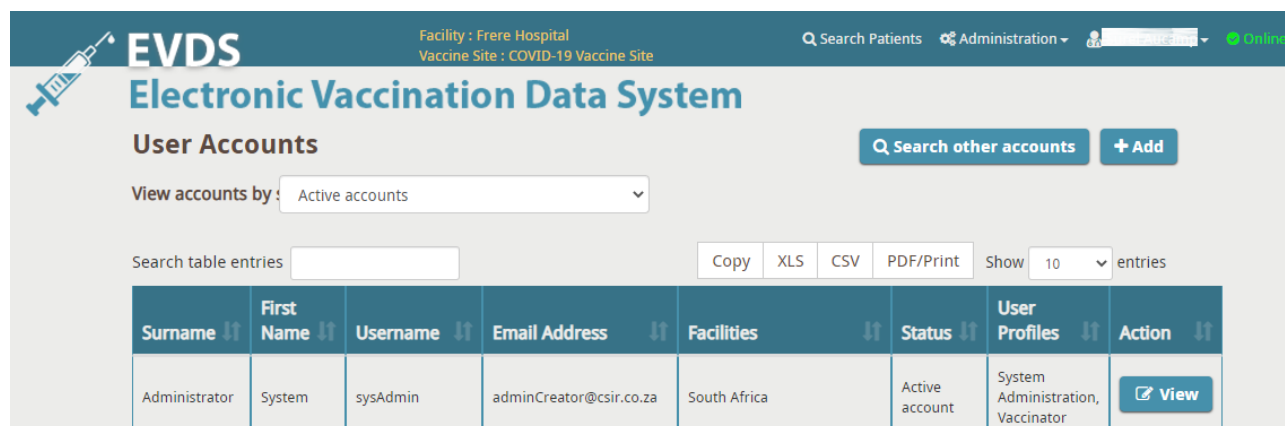
➢ **Add new account**

Select the *<Add>* button above the list of existing accounts. Provide all the required information for the user account on the **Create a New User Account** page.


- Provide the user's information under the *Contact Info* section.
    - Provide values for all the fields in the *Contact Info* section.

- The *Account Settings* section allows you to choose a date on which the account should be automatically expired.
    - Select the *Expire account on date* option to activate the date field. An expiry date can now be selected by clicking on the date field and using the pop-up date calendar.
    - This date is optional and only needed for temporary accounts that are only valid for a certain, predefined period of time.

- To make the account valid for an indefinite period of time, do not check the tick box to the left of the *Expire account on date* field.

- The *Assign User Profiles to User Account* section allows you to assign the user profile(s) for the account depending on which rights the user requires to perform his / her job.

  - An *Account Creator* can only assign the following user profiles to accounts:

    - Vaccinator

    - Patient Administrator

    - Reporting Administrator

    - Back Capturing Administrator

    - Account Creator

    - Account Approver

  See Appendix A:User Profiles and Associated Functionality for more detailed descriptions of what system functionality each user profile has access to.

- Assign a user to one or more organisational units by selecting the applicable units listed under the *Assign User to Organisation Units* section.

  - The only available organisational units will be those that the currently logged in user has been assigned to.

  - The Search function can be used to search for a specific organisational unit if the currently logged in user has access to more than one organisational unit.

- Click on *<Create User Account>* to create the new account with the details provided.

  - A green banner with the username and password provided by the system will be displayed across the screen.

    o The username will be in the format *Name_Surname* where 'Name' and 'Surname' is that of the user in question.

    o A randomised password will be created by the system. This password will be displayed in the green banner; and

    o The system will automatically send an email (to the email address provided for the user account) containing the user's login credentials;

    o The user will be required to change their password the first time they login to the system.

    o To dismiss the green banner click on the small cross provided on the right hand side.

  - A new account has to be activated by a user with *Account Approver* rights before the user will be able to use it to logon to EVDS.
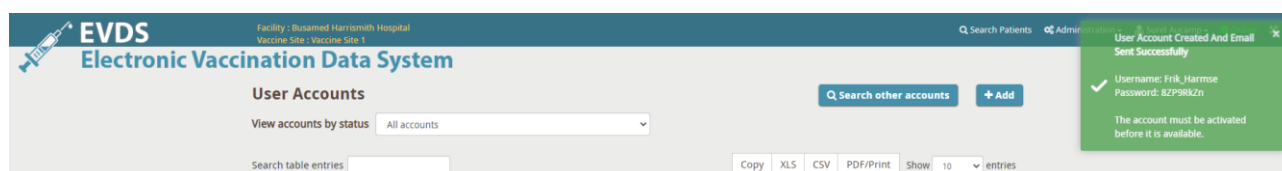

Note that the system will automatically send an email (to the email address provided for the user account) containing the user's login credentials.

Please ensure that the email address provided is correct and is the user's own email address.

➢ **Possible duplicate account found**

The system will display a message, warning of a possible duplicate user account if the details entered under the *Contact Info* section are similar to an existing user account in the system.
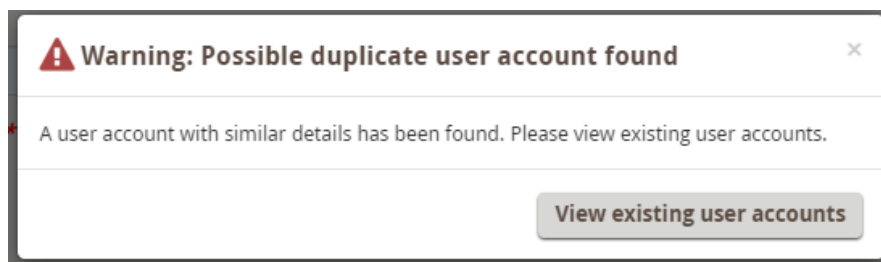
- Click on *<View existing user account>* and the system will list all the records found that is considered a possible duplicate.
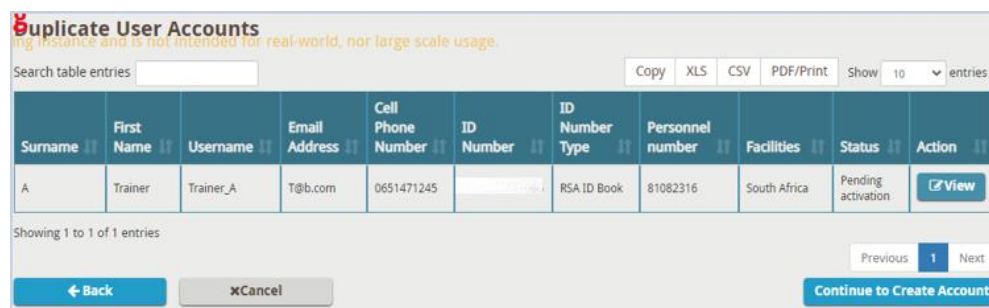
- Confirm the user's details on the list displayed.
  - If none of the displayed records belong to the user, select the *<Continue to Create Account>* button at the bottom of the list of records to be able to create a new user account.
  - The system will not allow you to create an account with the same ID number as an existing user account.

- If the user account *Status* is "*Deactivated*" click on *<View>* button to continue to confirm the user details and reactivate the user account. See **Reactivate deleted user account** below.

- If the user account *Status* is "*Active*" click on *<View>* button to continue to confirm the user details and update the user account. See **Edit existing account** below

- Should you wish to cancel the account creation, select the *<Cancel>* button.

➢ **Approve newly created accounts**

A new account will need to be approved before the user can login to EVDS. Only a user with the *Account Approver* user profile can activate an account. You can use the View accounts by status drop down to find accounts that need to be activated or search for a specific account by using the "search table entries" field.

- Select *<View>* to the right of the account you wish to activate.
- Confirm that all the user details are correct.
- Scroll down to the Account Status History of the user in question.

- Click on *<Process pending account>* to activate or decline the account.

- Capture all the required data into the fields and click on *<Activate account>* to activate the account or *<Decline activation>* to decline or *<Cancel>* to cancel the account activation process.

- If you click on *<Activate account>* button:
    - The system will automatically send an email to the user (using the email address provided) to inform them that their account has been approved; and
    - a green banner with the username for the account activated will be displayed on the top right corner of the screen.

- If you click on *<Decline activation>* button, a green banner with the username for the account being decline will be displayed on the top right corner of the screen.

> **Reset the password for a user's account**

A user with the *Account Creator* or *Account Approver* user profiles can reset an account password for accounts linked to the facilities that they themselves have access to. Password resets can be performed for user accounts with any one of the following statuses:

- **Active** – user has logged into the system and changed their password. Password is still valid and active and account can be used.

- **Password Expired** – the user neglected to update their password when prompted. Password expired. Password reset is required.

- **Pending Password Change** – the user has not yet logged in (after their account was created) to update their password. Password is temporary and will expire if the user does not log in within the required time period.

- **Pending Password Reset** – the user has not yet logged in (after their password was reset) to update their password. Password is temporary and will expire if the user does not log in within the required time period.

Reset a user's password by finding the account on the accounts page and selecting *<View>*.
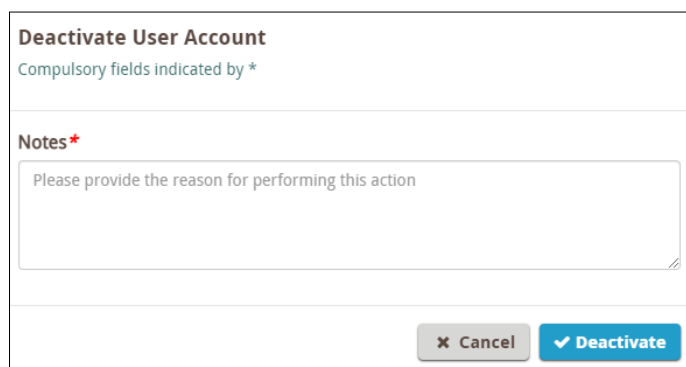
- Scroll down to the bottom of the page and click on *<Send password reset>*.
- When a user's password is reset the system will automatically send an email to the user containing his new generated password. So please ensure the email address for the account is correct.

➢ **Deactivate a user account**

A user's account can be deactivated 1) automatically – due to the user not changing/updating his password within the required time frame or 2) manually by an *Account Creator* when a user no longer requires access to the system.

To manually deactivate a user's account, an *Account Creator* user can deactivate accounts (with current status of "Active) that are linked to the facilities that they themselves have access to.

- When viewing user accounts, find the account that needs to be deactivated and select *<View>* to open this account details.
- Scroll down to the bottom of the page and click on *<Deactivate account>*

Deactivate User Account
Compulsory fields indicated by *

Notes*

Please provide the reason for performing this action
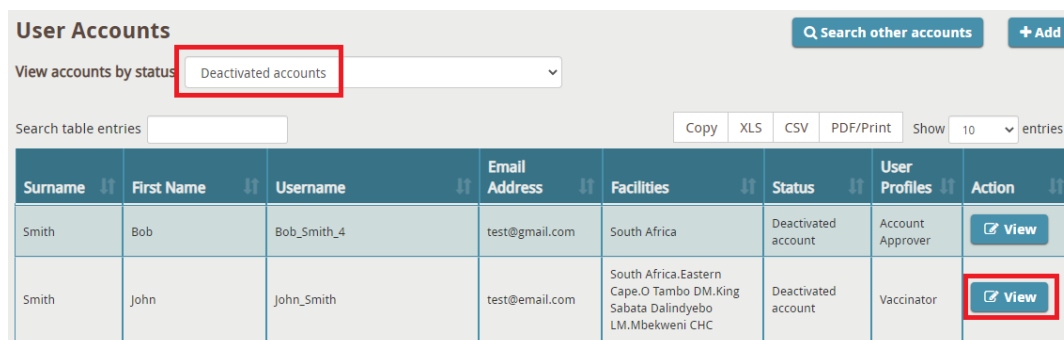
✕ Cancel ✔ Deactivate

- The system will prompt you to provide a reason for deactivation. Enter the reason in the "Notes" field and select *<Deactivate>*.

  Should you wish to not go through with the deactivation, simply select *<Cancel>* to cancel the deactivation and return to the account.

➢ **Reactivate a user account**

Users with the *Account Creator* profile can reactivate an account (linked to one of the facilities that he himself has access to) that is currently deactivated.

- To reactivate an account navigate to the accounts page and select "Deactivated accounts" next to the "View accounts by status" option. Find the account that you would like to reactivate and select *<View>*.

User Accounts   🔍 Search other accounts   ➕ Add

View accounts by status   Deactivated accounts   ⌄

Search table entries [   ]   Copy XLS CSV PDF/Print Show 10 ⌄ entries

Surname	First Name	Username	Email Address	Facilities	Status	User Profiles	Action
Smith	Bob	Bob_Smith_4	test@gmail.com	South Africa	Deactivated account	Account Approver	🖉 View
Smith	John	John_Smith	test@email.com	South Africa.Eastern Cape.O Tambo DM.King Sabata Dalindyebo LM.Mbekweni CHC	Deactivated account	Vaccinator	🖉 View

- Scroll down to the bottom of the page and click *<Reactivate account>*

- The system will prompt you to provide a reason for reactivation. Enter the reason in the "Notes" field and select *<Reactivate>*.

  Should you wish to not go through with the reactivation, simply select *<Cancel>* to cancel the reactivation and return to the account.

Reactivate User Account
Compulsory fields indicated by *

Notes *

Please provide the reason for performing this action

✖ Cancel   **✔ Reactivate**

- When a user's account is reactivate the system will automatically send an email to the user containing his new generated password. So please ensure the email address for the account is correct.

➢ **Search Accounts belonging to facilities other than your own**

When viewing or updating accounts, Account Creators can only see accounts that are currently linked (have access to) the facilities that they themselves have access to.

Use the *<Search for other accounts>* button to search for a *specific* account (already existing, with status "Active"), that do not currently have access to your facilities.

User Accounts   **Q Search other accounts**   **➕ Add**

View accounts by :   Active accounts   ⌄

Search table entries [   ]   Copy | XLS | CSV | PDF/Print   Show 10 ⌄ entries

Surname ⏶⏷	First Name ⏶⏷	Username ⏶⏷	Email Address ⏶⏷	Facilities ⏶⏷	Status ⏶⏷	User Profiles ⏶⏷	Action ⏶⏷
Administrator	System	sysAdmin	adminCreator@csir.co.za	South Africa	Active account	System Administration, Vaccinator	**☑ View**

Search for the specific account by either entering the ID number associated with the account, or by entering the name and surname of the account user.

Note that this option will only be available to users with the Account Creator profile.

User Account Search

| | | | | | | | Back to Accounts |

| Search by ID Number | Search by Full Name | | | | | | |

Compulsory fields indicated by *.

First Name*

monica

Surname*

geller

Q Search

Search table entries. [_____]   Copy XLS CSV PDF/Print   Show [10 v] entries

Surname	First Name	Username	Email Address	Facilities	Status	User Profiles	Action
Geller	Monica	Monica_Geller	braam.steenkamp@health.gov.za	South Africa	Active account	Vaccinator	✎ View

Showing 1 to 1 of 1 entries

Previous 1 Next

To discard this process and go back to viewing accounts that are already linked to your facilities, select the *<Back to Accounts>* button at the top right.

Else, to assign this user access to one of your facilities, click on the *<View>* button. The account will open (as per usual). Once confirmed that this is the account you searched for, scroll down to the bottom and select the facilities that you would like to give this vaccinator access to. Click on *<Save Edited Account>* to save the changes to the account.

This vaccinator will now have access to your facilities and will be able to select these facilities (when performing vaccinations) from their available facilities under the *Facility Settings* menu item

Lesson 6: System Configuration

Applicable User Profile(s):	• All
System Functionality Covered:	• Registration of machine upon every login

Every time a user logs into the system, they will be required to indicate which facility they are working at. The device being used has to be registered to a specific facility and vaccine site. The system will not allow capturing of information until the facility and vaccine site have been selected.
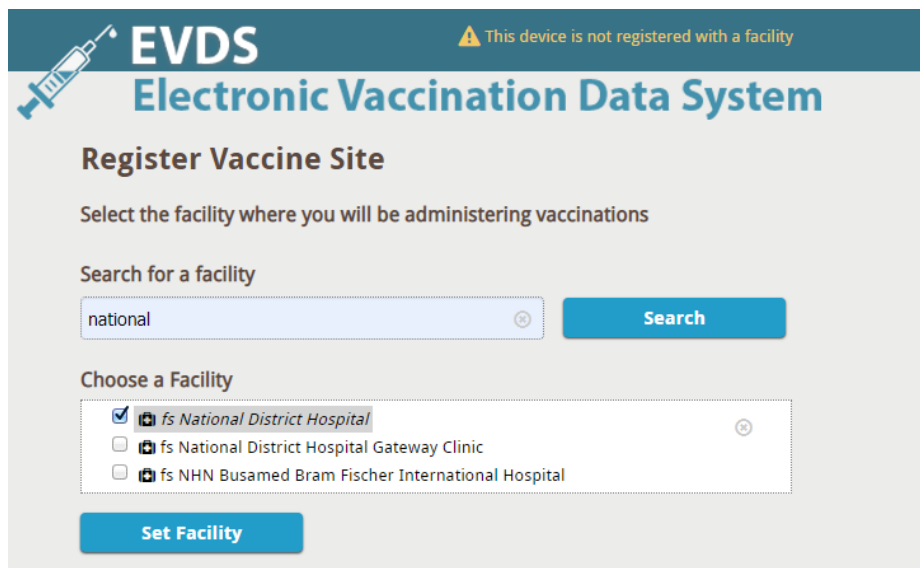
➢ **Registering an unregistered machine**

A message, "This machine is not registered with a facility", will be displayed at the top of the **EVDS Landing Page** indicating that the system is yet to be registered to a vaccine site.

To register the machine to a facility and vaccine site, log in to the EVDS with your login credentials. Once logged in, the system will automatically prompt you to select the facility name.

- Enter your facility name in the field provided and click on the *<Search>* button.

- The system provide you with one or more possible matches. Select your facility from the search results and click on *<Set Facility>*.

The system will now prompt you to select the vaccine site that you are at.

- Select your vaccine site from the available options provided and click on *<Set Vaccine Site>* to save your selection.

A notification is shown, confirming successful registration of the facility and vaccine site and the name of the selected facility and vaccine site are now displayed at the top of the screen.
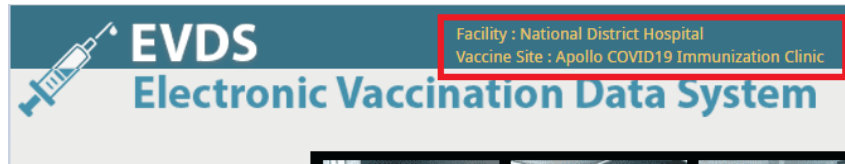
> ➤ **Changing the registered facility and vaccine site**

It is important to always ensure that your system is registered to the correct facility and vaccine site. If you notice that an incorrect site is selected, you can correct this by navigating to the *Administration➔Facility Settings*.
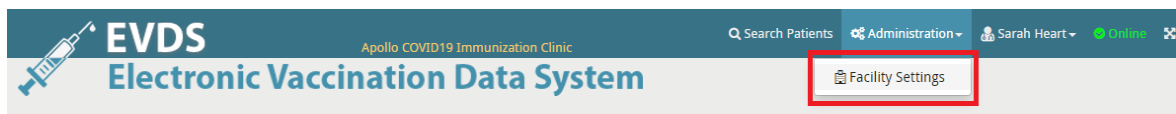
You can now:

- Just choose a different vaccine site at the same facility; OR
- Click on *<Choose a different facility>* button to select a completely different facility

> ➤ **No vaccine sites available at the facility**

If you select a facility that have no vaccine sites configured, the system will show a message that "No vaccine sites are available". You will have to arrange to have these vaccine sites registered and loaded before you can use the system at the specified facility. This request can be submitted via the EVDS service desk at https://hissupport.health.gov.za or via email to hissupport@health.gov.za

This means that this specific hospital will not be able to use EVDS until the service points have been configured.

CHAPTER 4 Operating the System

This chapter focusses on familiarising the EVDS user with the operational functionality of the system.

Lesson 7:   Search for and Manage Existing Patients

Applicable User Profile(s):	• Patient Administrator • Vaccinator • Back Capturing Administrator
System Functionality Covered:	• Searching the system for a patient • Updating an existing patient record • Capturing patient consent • Capturing a vaccination for a patient

To find a patient record, click on either the *Search Patients* menu item at the top or the *<Search for Patient>* button provided in the centre of the **Home Page**.

Patient Search Step 1: Search For Patient

① Search Patient	② Patient Details	③ Select Action	✓ Complete Action

📇 Search by Number	🗓 Appointments

Search by Number

Compulsory fields indicated by *. Enter ID number, patient record number, or other number (passport, asylum or refugee number) e.g. 6810124050089

Type of number to search for*
◉ ID number ○ Patient record number ○ All other numbers

Number to search for*

[Enter identification number]   [🔍 Search]   [Show 10 results ▾]

The **Patient Search** page divides the process into *Search Patient*, *Patient Details*, *Select Action* and *Complete Action* steps.   Completed steps will be highlighted to indicate the progress of the registration process.

1. Search Patient

The first step of this process will be to search for the patient on the system. Searches can be performed using a valid South African Identification number (ID), patient record number (HPRN) or passport number.

➢ **Search by Number**

- On the *Search by Number* tab, select one of the below options and enter any one of the accepted values indicated below:

  ▪ **ID Number** – accepted values:

    ▪ South African national identification number,

    ▪ Refugee identification number

    Note that the ID number can be entered by either:

    a) Manually typing the ID number into the field provided; or

b) Selecting the input field (by clicking on it) and then using the provided barcode scanner to scan the barcode on the patient's green RSA ID book or driver's license.

Option b) above is only possible if:

1. The facility is equipped with the required barcode scanners; and
2. The patient presented a RSA green ID book, smart ID card, or a South African driver's license.

- **Patient Record Number (HPRN)** – accepted values:

  - Valid Health Patient Record Numbers assigned by the Health Patient Registration System (HPRS) only.

- **All other numbers** – accepted values:

  - South African passport number,

  - Foreign passport number

  - Section 22 (asylum seeker)permit number

  - Section 24 (legal refugee) permit number

  - Refugee identification number

- Click on *<Search>*

- The system will list all the patient records found that is considered a possible match to the search criteria.

- Confirm the patient's details in order to select the correct record.

- Click on the record to continue.

Once the patient record is selected from the list, the system continues to step 2 (Patient Details) of the process.

Note: If no matching records were found on the server, the system will display a *No Search Results* message at the bottom of the screen.

> ➢ **Appointments**

If a patient has a scheduled appointment on the system, these will be displayed on the *Appointments* tab. Select the *Appointments* tab to view all existing appointments.

- Select the date for which you would like to view appointments, then
- Select the patient record from the list of appointments

- Selecting the patient record from here will take you to the Patient Details page described in step 2 below.

2. Patient Details

When a successful search has been executed (as described in step 1) and the patient record has been found on the system, the patient's details are displayed.

Clicking on *<Back to Search>* at any time will completely cancel the process and direct the user back to step 1 (Search) of the process in order to start a search.

Various different actions can be performed from here. Select a menu item on the left to access the different functionality.

The menu items on the left will be disabled until you have confirmed the patient's details.

> **Patient Summary**

You have to confirm that you have are viewing the correct patient record before you can edit or provide additional patient information.

- Select the checkbox to confirm that you have verified:
  - The patient information; and
  - The voucher number that was presented. All vouchers linked to a patient is displayed here. Vouchers can have different statuses:
    - ○ Issued – the voucher will be used when the vaccination is registered
    - ○ Redeemed – the voucher has already been used for a previous vaccination

    If no "issued" voucher is available the vaccination can continue without the voucher, and a voucher will be issued after the fact.

- Click on the *<Confirm Patient Details>* button

Note: Voucher numbers are not compulsory for the vaccination process to continue, but if a number is presented it is important to ensure that it is correct.
If any information is incomplete, the system will prompt you to provide this before you can continue.

Edit Vaccination Patient
Compulsory fields indicated by *

Medical aid: Please select a medical aid.
Marital status: Please select a marital status.
Language: Please select a language.

Surname*

Masege

First Name*

Lazarus

Middle Name(s)

Date of Birth*	Sex*	Marital Status*
1967-04-15	● Male ○ Female	Select marital status ⌄

Preferred Language*	Medical Aid*
English ⌄	Select patient's medical aid ⌄

Medical Aid Number

Enter patient's medical aid number

Email Address

Enter patient's email address e.g. john@gmail.com

Cell Phone Number

Enter the required information, scroll down to the bottom of the form and select <Update Patient> to save the additional information.

- You can at any time click on *<Save and Exit>* at the bottom of the page to save the changes to the patient's record (and exit without registering a vaccination); or

- Select *<Register Vaccination>* to save the changes and continue to capture vaccination details (only available for users with the *Vaccinator* user profile).

➢ **Edit Patient Info**

If required, edit the patient's demographic information that are currently captured on the system.

- Click on *Edit Patient Info* to the left of the patient's information to update the existing information or provide new information for incomplete fields.

- Confirm that all the patient information is up to date and correct.

- Select <Update Patient> to save any modifications

➢ **Verified Documents**

The _Verified Documents_ tab displays all of the identification documents that are linked to the patient's record.

- Delete an existing document that is no longer valid by clicking on the _<Delete>_ button next to verified document entry.

    There should at any time be at least one valid identity document registered for a patient. It will thus not be possible to delete a document if it is the only registered one. A verified document with associated vaccinations will not be deleted, it will be greyed out and moved under the _Proof of identity (inactive)_ field.

- Add a new identity document (as presented by the patient) by clicking on _<Add>_.

- Select the type of document from the list provided for _Documentation presented_.

- Enter the _Identification number_ printed on the document.

- Provide the _Document expiry date_ if applicable.

    Note that certain validity checks are performed on some document identification numbers.

    - South African ID numbers will only be accepted by the system if it:

        - Is 13 numeric digits

- o Passes the checksum validation used by the Department of Home Affairs to validate ID numbers.
- o All South African passport numbers have to be 9 alpha-numeric digits.
- Select *<Save>* to submit the new document's details or *<Cancel>* to discard the changes made. The system returns to the list of captured documents.

➢ **Vaccination History**

The *Vacation History* tab displays a list of previous vaccinations that was received by the patient. The date and time, vaccination dose (1st or 2nd), documentation presented, name of facility visited, and the facility type are provided.

In the last column you can select *<Vaccination Details>* to view all information (vaccine info, adverse events, and answers to medical background questions) associated with this vaccination.

Add any Adverse Events associated with a vaccination by clicking on *<Adverse Events>* button to the right of the Adverse Events History.

➢ **View Appointments**

The *View Appointments* tab displays the appointments associated with the patient.

3. Register Vaccination

Note that vaccinations can only be captured by a user with the *Vaccinator* profile. Or, in the event of back-capturing, by a user with the *Back Capturing Administrator* profile.

To register a vaccination - search for the patient, confirm the patient details then select *<Register Vaccination>.*

This will initiate the registration process during which the vaccinator will be required to capture information regarding the patient's health background, consent and vaccine information.

> ➢ **Back-capturing of vaccinations**

If you are busy capturing a vaccination that occurred in the past, i.e. "back capturing", indicate this by selecting *Back Capture?* At the top of the page. Once enabled, you will be required to provide the date and time on which the vaccination occurred, as well as the name of the vaccinator that administered the vaccine.

NB: Only enable back capturing if this vaccination happened in the past at a time during which it could not be captured directly on the system.

Once the required information for back-capturing has been entered, the rest of the process will be the same as the Real-time capturing of vaccinations described below.

> ➢ **Real-time capturing of vaccinations**

If you are a vaccinator and capturing the information for a vaccination that is happening at this moment, leave the *Back Capture?* disabled.

- Capture the patient's health background by asking and completing answers to all of the questions displayed.

- Once all of the questions have been answered, the vaccinator has to indicate whether (s)he wishes to continue with the vaccination. Select *Yes* to continue, or *No* to exit the vaccination process.

- If the vaccinator wish to continue, the system will now require the user to explain to- and capture the patient's consent.

- Select the type of vaccine that will be administered to the patient.
- Explain the vaccine information to the patient and indicate that it has been completed by selecting the checkbox.

- The next step is for the patient to provide consent. Select *Yes* or *No* to indicate whether the patient provides consents to getting vaccinated. If *No* is selected, the vaccination process exits.

- If the patient gave consent, the process will continue and the user will be required to capture the information associated with the vaccination.

- Before capturing the vaccination information, the user is required to physically administer the vaccine to the patient. The system prompts the user to administer the vaccine before capturing and completing the vaccination on the system.

   o Administer the vaccine to the patient, then select "I confirm that the vaccine has been administered to the patient".

   o Once selected, the fields in this section will be enabled and the user will be able to complete the vaccination registration.

Patient: Siyabinga Makhanya

Back capture?	Date of vaccination *	Time of vaccination *
⬜ (toggle off)	2021-05-06	10:03

Obtain Health Background   +

Record Informed Consent   +

Register Vaccination   –

Please ensure that you administer the vaccine to the patient before completing the information in the next section.

☐ I confirm that the vaccine has been administered to the patient. *

Which document did the patient present to verify his/her identity? *

    RSA ID Book: 9004065232087
    Affidavit to Verify South African ID Number
    Affidavit to Verify Foreign Passport Number

If you cannot find the document, **Add New Document**

Select a reason for Vaccination *

    Vaccination 1st dose ⌄

Select vaccine manufacturer *

    Pfizer ⌄

Select vaccine batch number *

    Select vaccine batch number... ⌄

Vaccine serial number

    [   ]

Vaccine expiry date	Vaccine manufacturing date
YYYY-MM-DD	YYYY-MM-DD

← Back to Patient Summary   ✕ Cancel   ✔ Register Vaccination

---

- Select the type of documentation that the patient presented as identification.

   Note that by selecting a type of documentation you are also confirming that you've seen the physical identification document and performed a visual certification.

   If the documentation presented is not listed in the list, click *<Add New Document>* to add the document presented.

- Select a reason for vaccination, by indicating if this is the first vaccination or the second vaccination.

- Select the vaccine batch number
- Provide the vaccine serial number (if available).
- Confirm the Vaccine expiry date.
- Provide the Vaccine manufacturing date (if available).
- Click on *<Register Vaccination>* to complete the vaccination for this patient.
- A page is displayed with a summary of the patient details as well as the unique vaccination number.

  -

  -
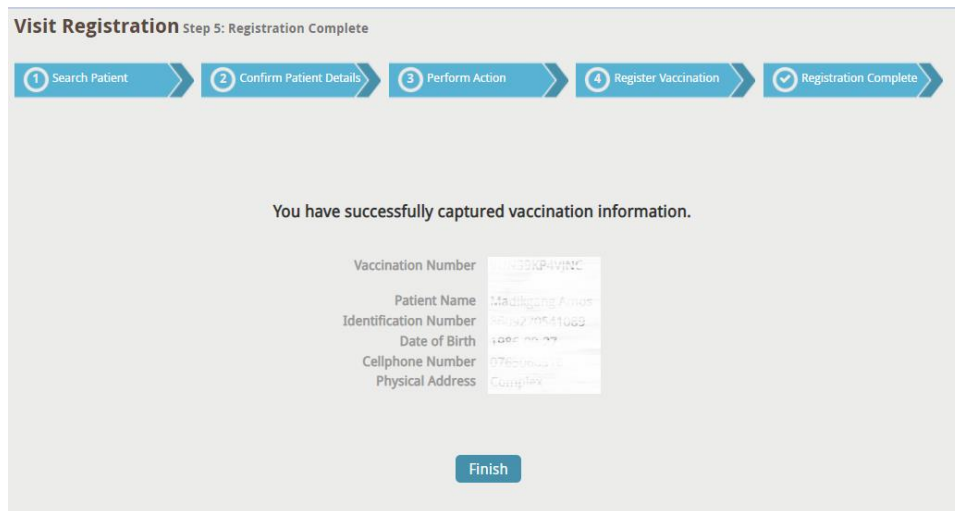
- Select *<Finish>* to navigate to the *Search by Number* tab in order to start a new visit registration.

Lesson 8:   Reporting

Applicable User Profile(s):	• Patient Administrator • Account Creator
System Functionality Covered:	• Creation, viewing and exporting a report

A basic report has been made available on the system that provides information on the number of vaccinations that occurred at a facility.

➢ **View Reports**

To view previously generated reports, navigate to *Reporting→View Reports* from the **Home Page**.

- If the "Status" column does not show a green check mark, the report is still being generated.

- Reports will automatically be removed from the system when the "Expires" date is reached. If you wish to keep a copy of the report, be sure to export the report before this date is reached.

- Delete a report by clicking on *<Delete>* next to the report name.

- View a report by clicking on *< View>* next to the report name.

  o When the user clicks on *<View>* for a specific report entry, this report will be displayed

Facility Reports

Vaccinations at Facility (Vaccination Count) Report ℹ️   🗑 Delete Report

Report generated at: Vaccine Site 1
Report date range: 2021-05-05 to 2021-05-05
Report generated on: 2021-05-05
Report generated using online (central server) data

Search: [   ]   Copy XLS CSV PDF/Print   Show [10 ▾] entries

Facility ID	Province	District	Subdistrict	Facility	Vaccine Site	Currently Closed	Total Vaccinations
1141	Eastern Cape	Buffalo City MM	Buffalo City SD	Frere Hospital	COVID-19 Vaccine Site	No	1
1257	Eastern Cape	O Tambo DM	King Sabata Dalindyebo LM	Mthatha General Hospital	ec Mthatha General Hospital	No	1
1892	Free State	T Mofutsanyana DM	Maluti-a-Phofung LM	Elizabeth Ross Hospital	OPD	No	1
2830	Limpopo	Capricorn DM	Blouberg LM	Helene Franz Hospital	COVID-19 Vaccine Site 1	No	2
3144	Gauteng	Johannesburg MM	Johannesburg D SD	Chris Hani Baragwanath Hospital	COVID-19 Vaccine Site	No	1
51058	Free State	Mangaung MM	Bloemfontein SD	Mediclinic Bfn Hosp	COVID-19 Vaccination Site 1	No	1
51203	Western Cape	Cape Town MM	CT Western SD	Netcare C Barnard Hosp	Netcare Christiaan Barnard Memorial VS	No	1
51231	Northern Cape	Frances Baard DM	Sol Plaatje LM	Mediclinic Gariep Hosp	Mediclinic Gariep	No	2

Showing 1 to 8 of 8 entries

Previous **1** Next

- It is possible to copy, print or export (csv, excel or pdf format) of the generated report by selecting the appropriate button at the top right of the report results.

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- ➢ **Generate Reports**

To generate facility reports, navigate to *Reporting➔Facility Reports* from the Report Viewer's **Home Page**.

The *Facility Reports* page is displayed.

- Select the report by clicking on the correct icon from the list of options provided under the *Facility reports* field.
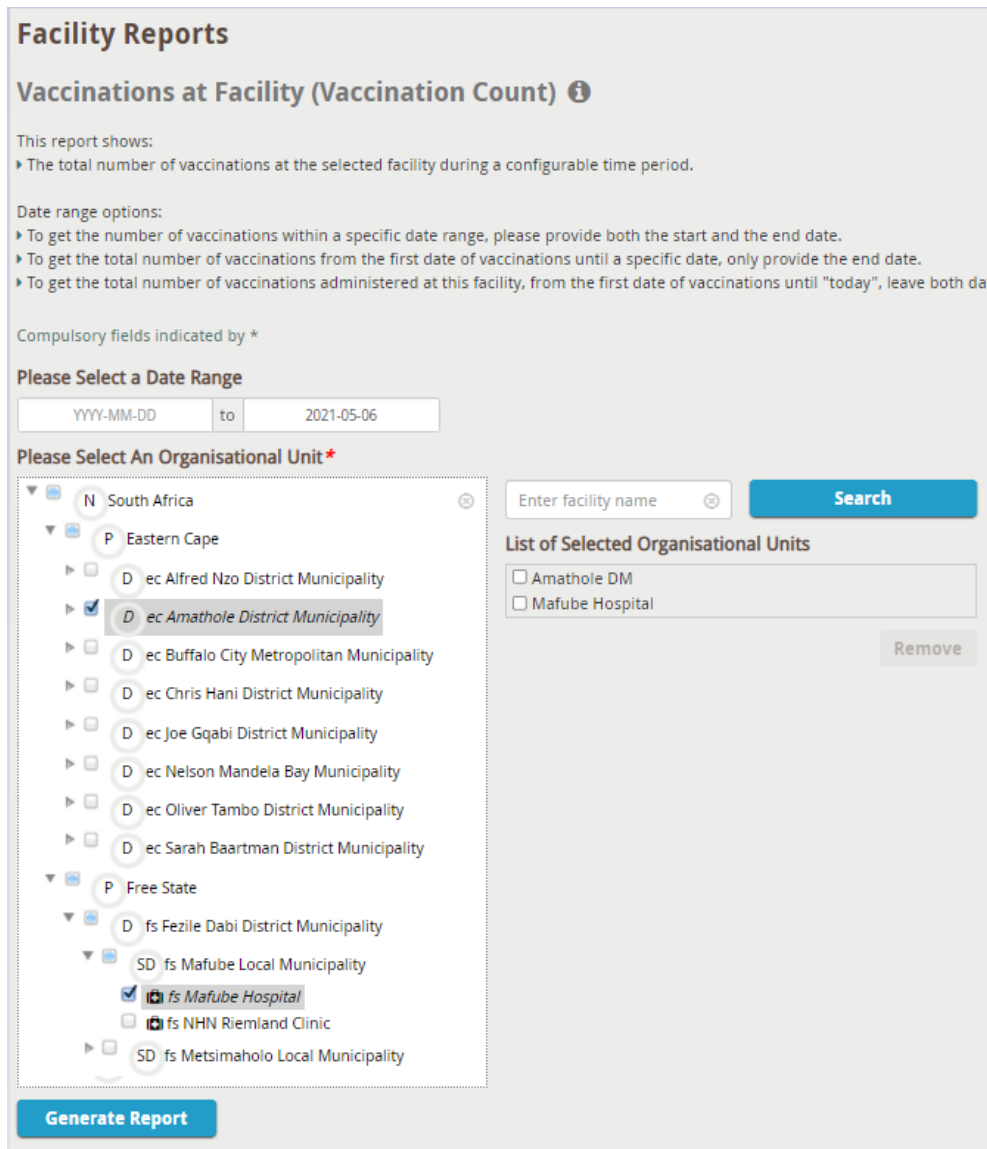

Facility Reports

Vaccinations at Facility (Vaccination Count) ⓘ

This report shows:
▸ The total number of vaccinations at the selected facility during a configurable time period.

Date range options:
▸ To get the number of vaccinations within a specific date range, please provide both the start and the end date.
▸ To get the total number of vaccinations from the first date of vaccinations until a specific date, only provide the end date.
▸ To get the total number of vaccinations administered at this facility, from the first date of vaccinations until "today", leave both dates empty.

Compulsory fields indicated by *

Please Select a Date Range

| YYYY-MM-DD | to | 2021-05-06 |

Please Select An Organisational Unit *

| ▸ ☐ ⓝ South Africa | ⊗ | Enter facility name ⊗ | **Search** |

Generate Report

- Date range options:
  - ○ To get the number of vaccinations within a specific date range, please provide both the start and the end date.

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- To get the total number of vaccinations from the first date of vaccinations until a specific date, only provide the end date.
- To get the total number of vaccinations administered at this facility, from the first date of vaccinations until "today", leave both dates empty.

  Note that the *Report description* provides assistance on how to use the date range.

- Clicking on any information icon will either display or hide additional information relating to the report. 🛈

- Select or search for facility(s) for which you would like to generate the chosen report.

  Note that you can only generate the report for facilities to which you yourself (as the logged in user) have access to.

- Select a facility / facilities under the *List of selected Organisational Units* and click *<Remove>* button to remove selected facility / facilities from the list.

- Click on *<Generate report>* to generate the chosen report.

- The report will be generated and results will be available from the **View Reports** page as soon as generation is complete.

Appendix A: User Profiles and Associated Functionality

Table 1: System Functionality associated with default User Roles

User Profile (Assigned roles)	System Functionality
Vaccinator	• Register the facility and vaccine site • Search for and manage beneficiary information • Capture identification documents for patients • View appointments • View vaccination history • Capture adverse events • Perform back capturing of prior vaccinations • Register real-time vaccination, including: ○ Capturing of patient consent
Patient Administrator	• Register the facility and vaccine site • Search for and manage beneficiary information • Capture identification documents for patients • View appointments • View vaccination history • Generate and view the "Facility Vaccinations (Vaccination Count)" report
Reporting Administrator	• Register the facility and vaccine site • Generate and view the "Facility Vaccinations (Vaccination Count)" report
Back Capturing Administrator	• Register the facility and vaccine site • Search for and manage beneficiary information • Capture identification documents for patients • View appointments • View vaccination history • Capture adverse events • Perform back capturing of prior vaccinations, including: ○ Capturing of patient consent **Note**: This user can *only* capture vaccinations that occurred in the past and are not allowed to capture real-time vaccinations
Account Approver	• Register the facility and vaccine site • Approve or decline newly created accounts • Reset account passwords
Account Creator	• Register the facility and vaccine site • Create new accounts (or edit existing ones) for vaccinator, patient administrator, reporting administrator, back capturing administrator, account creator, and account approver users • Reset account passwords • Deactivate account • Reactivate accounts • Generate and view the "Facility Vaccinations (Vaccination Count)" report

Appendix B: Troubleshooting

Report all system failures and/or difficulties to the EVDS service desk at:

☏	012 395 9020; or 012 395 9712; or 012 395 9711; or 012 395 9713
E-mail	hissupport@health.gov.za
www	https://hissupport.health.gov.za