HSE salesforce IBM

HSE's Covax System

Module 1A Training Guide

Unit 1

Introduction to the HSE's Covax System

Training Guide Last Updated: 31ˢᵗ August 2023

Estimated reading time is __50 minutes__

Please note, this is your *one-for-all guide* for getting set up on the HSE's Covax system.

This comprehensive document outlines the processes to set up your tablet or computer, access your Covax account, verify your account, and install security protection features.

Table of Contents

Glossary of Terms

The following terms will be used in this document and throughout your Covax learning journey.

Term	Description
Client	Term given to the person receiving the vaccine.
Covax	The main system utilised by the new user, also called 'Production'
HSELand	The HSE database for mandatory training for all HSE Employees
MyTrailhead	The database of mandatory training modules tailored for Vaccinators/ Ops Admins and module completion in the form of myTrailhead badges
Multi Factor Authentication (MFA)-	A security software and mandatory step in setting up an account
Operations Administrator (Ops Admin)	A type of Persona (account) given to the user. They manage a client's data on the Covax system and oversees any 'walk-in' appointments, registering them on the Covax system.
Personas	A term used for the different groups or types of users within Covax
Release/Sprint	A term given to a set of updates that are routinely given to Covax
Sandbox Site	A term used for a replica of Production, primarily used for practicing Vaccinator/Ops Admin training.
Salesforce	The parent company to Covax
Service Cloud	an Application within Covax used to assign cases and track resolution of issues raised by Support teams.
Tablet	The smart device used by the Vaccinator/Operations Administrator
Train 01	The training system utilised by the new user
URL	The smart device used by the Vaccinator/Operations Administrator
Vaccinator	A type of Persona (account) given to the user. They are the person performing the vaccine for the client, and who enters the vaccine details on the Covax system.

1. Introduction to the HSE's Covax system

1.1 What is Covax?

"Covax" is the name of the Irish Health Service Executive (HSE's) Vaccination Platform software system application that is used to manage, monitor and support the process of administering the COVID-19, Influenza (Flu), and the Pneumococcal vaccinations across Ireland.

The system also receives data directly in from GP's and Pharmacies that use a different system for recording their vaccination data.

The Journey So Far
- The Covax system is built using a software called 'Salesforce Health Cloud'.
- The system was first launched in January 2021 in response to the Covid-19 pandemic and the need to provide vaccinations to the public.
- Since the system launched, it has a stored record of over 14.5 million vaccine doses administered to the public; and it has approximately 4.2 million client records stored on the system.
- At the peak busiest time of the COVID-19 pandemic, over 8000 users were using the Covax system daily to log information, across Ireland.

1.2 What does the Covax system allow you to do?
The Covax system allows you to:
- Schedule vaccination appointments.
- Record the client's consent to go ahead with vaccination.
- Check and confirm the client's eligibility to receive the vaccine by completing an assessment with them.
- Record details digitally of the vaccination course the client receives, including details such as including location, vaccine batch code etc.
- Facilitate issuing proof of vaccination certificates for the client.

1.3 Who uses Covax?
The main users of the Covax system who directly use it to input data and plan their vaccination schedules are 'vaccinators' and 'operations administrators'. We call these different groups of people 'personas'.

A persona represents a group of people who perform a specific role.
The persona describes the key areas of focus for each role, and the specific process//steps they perform.
See the examples outlined below:
- **Client/Public** = A member of the general public who is receiving the vaccine.

- **'Operations Administrator'** = a person who manages the client's data on the Covax system and oversees any 'walk-in' appointments, registering them on the Covax system. Depending on context, there can be two levels of Operations Administrator;
  - Base = The Operations Administrator manages data and walk in appointments.
  - Specialist (has specific 'Data Quality' permission sets = has a 'Create Reports & Dashboards, Data Quality and Meds Management permission set) = They are a
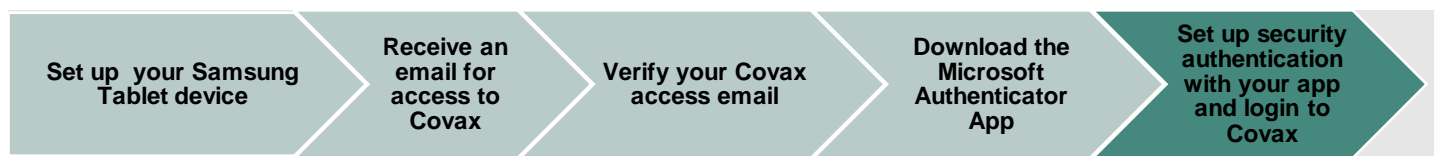
smaller group of Operations Administrators who have been identified as 'Data Quality Specialist Users.'
They have additional permission sets on the Covax system to edit data. They also are responsible for coaching and leading other Operations Administrators within their location.
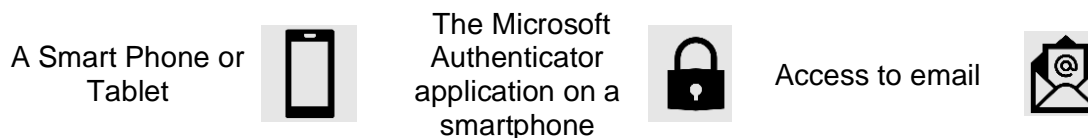
- **'Vaccinator'** = the person performing the vaccine for the client, and who enters the vaccine details on the Covax system.
    - COVID-19 Vaccinator = this vaccinator is tasked with administering COVID-19 vaccines to clients. They can then enter the vaccine details on the Covax system using either a computer or on a Samsung Tablet.
    - Vaccinator for Influenza (Flu) / Pneumococcal = this vaccinator is tasked with administering Influenza (Flu) or a Pneumococcal vaccine to the client.
    - Dual vaccinator = this vaccinator is tasked with administering either a COVID-19 vaccine or an Influenza or Pneumococcal vaccine to the client.

That is a little bit of an introduction and insight into who uses Covax and what it is used for, now we will help you get set up on the system, with the next steps!

2. Your on-boarding journey – the steps involved

Set up your Samsung Tablet device	Receive an email for access to Covax	Verify your Covax access email	Download the Microsoft Authenticator App	Set up security authentication with your app and login to Covax

The equipment you will need to get started are:

A Smart Phone or Tablet   The Microsoft Authenticator application on a smartphone   Access to email

The above visual outlines the different steps involved in your on boarding journey as you get setup on Covax.
Your manager or a team lead will have to request that your accounts be authorised for setup on Covax before you proceed with steps below.

You will need a Samsung tablet or smart phone, a computer desktop, an email account, and be able to download a security app that helps you login to Covax.

3. Getting set up to access the Covax system
Follow the steps for getting setup below to get started!

3.1 Your Samsung Tablet device – set up, switch on, log-on, access Covax

If you are turning on your Samsung tablet for the first time,
Follow the below instructions on how to turn it on and understand the functions and features available to you on the tablet.

Step 1: To power on the tablet, press and hold the middle button on the right-hand side (it is above the red button) for 2-3 seconds. It is the same process to turn off your tablet.

Step 2: Once the tablet is on, press any button to 'wake' the screen.
 Enter the standard pin number you were provided for your Samsung tablet - Your local 'lead' will provide you with the PIN number.

Note: The tablet will enter sleep mode after 30 minutes of inactivity and the pin will need to be input again, every time the screen locks.


Step 3: To lock your tablet you can press the middle button, which is located just below the volume control as shown below:

Step 4: When you see the homepage of your tablet, there will be a blue cloud icon called 'Salesforce'. This is the app that you will need to click on to access the Covax system.

Step 5: When you click on the Salesforce app icon and the Covax page opens, it will ask you to put in your Samsung Tablet PIN again as a security feature.
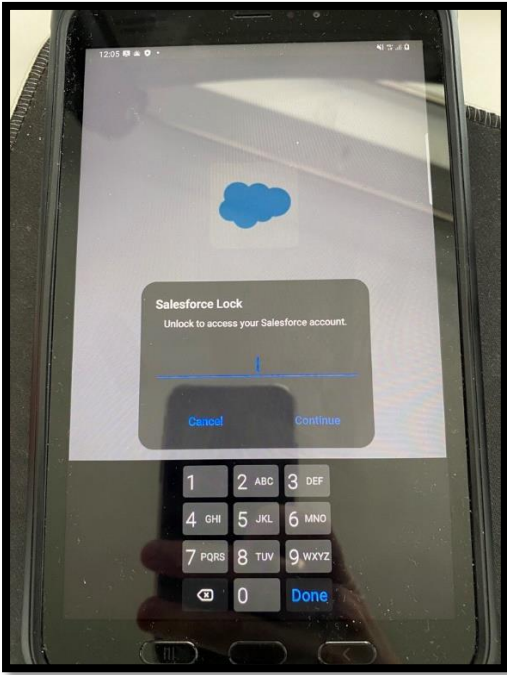
Step 6: To power off your tablet, on the right-hand side of the tablet push and hold the small black button AND the 'down volume button' at the same time.

Tap the red power off icon on the screen.

Charging time: We recommend the tablet is charged-up each evening.

For further information:

a) The web workspace icon is how you will access the Covax Training webpage and from there, you can access through to the learning platform called 'myTrailhead' which is covered in detail in Module 1A2.

b) The content workspace icon is where you will find selected learning material and updates. This is also covered in detail in Module 1A2.

c) There is a 'voice assistant' feature on the Tablet. If you wish to turn this off, you can hold the volume up and down buttons simultaneously for 5 seconds.
If successful, you will get a notification that voice assistant has been disabled.

d) Security of the Samsung Tablet

Security: Keep the tablet in a secure location at all times similar to all technology assets on behalf of the HSE, such as your laptop and phone.
Note: there will be a team leader (in large vaccination locations) who is responsible in partnership with you.
• Every device has an asset label on the back of it.
• A team lead will capture all asset numbers at the start of your day so that the information is captured to report in case of a lost device.
If lost, the device will be wiped clean and paused to inactivate usage.

e) How to connect to Wi-Fi –via Settings

The tablet works on Wi-Fi and/or data roaming, ensuring that you will have internet coverage as your work throughout the day.
The tablet will have a mobile data connection however in areas where there is a weak connection, you may need to connect to a Wi-Fi network if available.

To connect to a Wi-Fi network, follow the steps below.
1. Tap the "settings" folder in the middle of the screen. Select "Connections".
2. Choose "Wi-Fi" toggle to on.
3. Available networks will display for you to choose from.
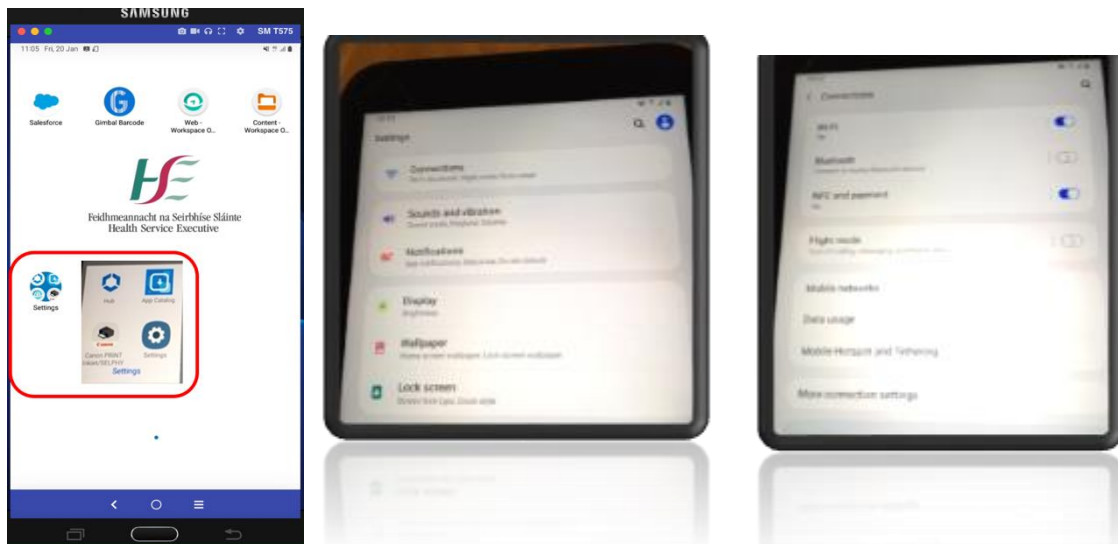
Other points:

- The tablet does not allow you to download additional applications
- Date and time are automatically set on the tablet, the user will **not** need to manually update this.
- See the tablet guide document under Module 2A.2 on the learning platform 'myTrailhead', should you wish to learn more about your tablet.

3.2 Accessing Covax – through a computer or tablet

- You can enter the Covax web system using either; a computer, or a HSE provided 'Samsung' Tablet device.

- Please note that when first accessing and verifying your account, you must do this via computer or laptop **and not** via the tablet.

- Using the tablet is beneficial if you are moving locations throughout the day, as it ensures you have continued access to Covax if vaccinating in different locations.

- The Samsung Tablet also has a beneficial feature called 'Kiosk mode', which is an easier 'view' layout of the Covax system while on the move. More details on this feature will be explained later in Modules 10A and B.

3.3 Computer - Setup and accessing the Covax web system through a computer

In order to access the live Covax web system through a computer, you will need to access through a web browser.

A browser is your internet search engine. The recommended browser to use to access Covax is **'Google Chrome'.**
You can also use 'Safari' or 'Firefox' also; however, Internet Explorer will **not** work.

The live Covax system can also be accessed using the following website URL link:
https://hsecovax.lightning.force.com/lightning/n/Today1

What is a URL Link?

A URL link is the text that you type into your internet browser search bar at the top of the web browser, when you want to go to a website. It is a webpage link. It usually starts with "http://" or "https://" followed by the rest of the website name.

Step 1: On a computer, you can 'copy and paste' the website URL link from the Covax e-mail you received into the top of your browser.
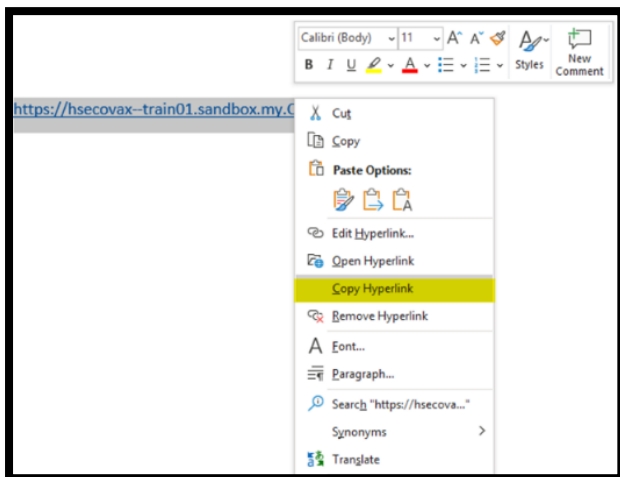
Step 1a: To copy and paste this link into the search bar of your internet browser, first,
• Highlight the full URL link in the activation email you received with your login details:
• Right-click on your mouse
• Select "Copy Hyperlink".
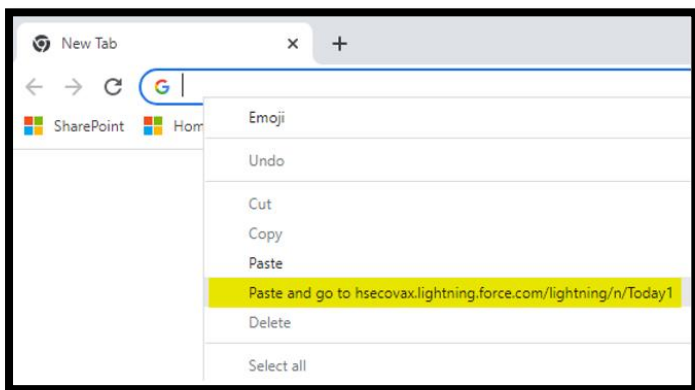
Step 2: Go to your Internet Browser.
Step 3: Click on the address bar, right click on your mouse, and select "Paste" and go to the website.

3.4 Setting up your access to Covax: Important to note if you are a returner or new joiner:

- If you are a new joiner and are accessing Covax for the first time through a computer, you will be led through the process to set up security, set your vaccinator location, and your vaccinator pin.
- If you are a new joiner, it is **not possible** to complete setup for Covax on the tablet. Use a desktop first to complete your setup. Then you will be ready to use your tablet.
- If you are a returner from flu season last year and are accessing Covax through a computer for the first time again, you will need to reactivate your account, see Section 3.6.
- If you are a returner from flu season last year, and are trying to access Covax through a tablet, for the first time again, you will need to reactivate your account, see Section 3.6.

3.5 Receiving your email with your login for Covax and logging in for the first time.

Once your manager has approved you to be setup on the Covax system, you will receive an email with login details for accessing the Covax web system.

Please make sure to check your **'spam'** or **'junk'** folder in your email for this email with the login details.

Please note the following re Covax accounts:

Under HSE Guidelines, accounts should only be approved for users who have a genuine business reason for access to Covax; otherwise, this is a security breach.

Note: that there are licence and associated support costs per user account.

Therefore, requests should only be submitted for, and Authorised Approvers should only approve, users that have a genuine business reason at that point in time.

The first step to look out for is:

Step 1: You will receive the email from the sender: support@emea.salesforce.com .

This email address is auto generated, it is **not** a support email, and you should **not** contact this email address if you have issues during setup.

If you require help during setup, see the support emails and avenues listed below in the Appendices under 'Additional Support'.

The email you will receive will look like this:
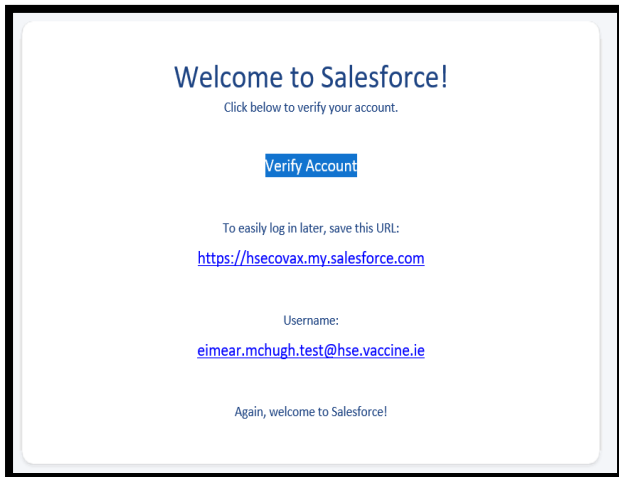
There are 3 important details on this email that you should take note of:
1. The 'Verify Account' link highlighted in blue shading above.
Note: You have 5 days from the time you receive the email to verify your Covax account.
Please, make sure to verify your account as soon as possible, as the link will expire, and it will require additional steps to request a new one.

2. The website link for the Covax system: https://hsecovax.my.salesforce.com
Please, save this website link, so you can access the Covax system later.

3. Your unique username for the Covax system.

Step 2: You will be prompted to create a password and answer a security question.
Please note: Do not click the "Remember my credentials' option when logging in for the first time following the password set up, as this makes you vulnerable to hacking. Keep note of the verification email as this will have your username in it in case it is forgotten.

Step 3: Click Change password.
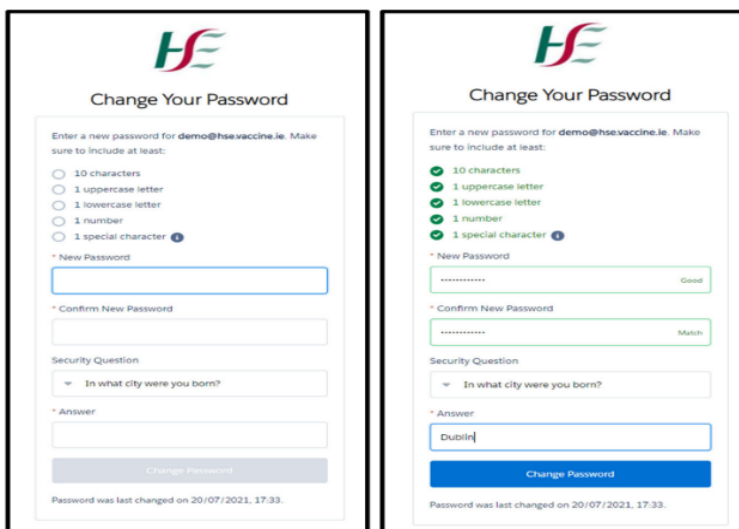
Step 4: If you are set up with **a new account** on the system, as a vaccinator or operations administrator, you will be brought through to a home page on Covax, which will look like the screenshot below.
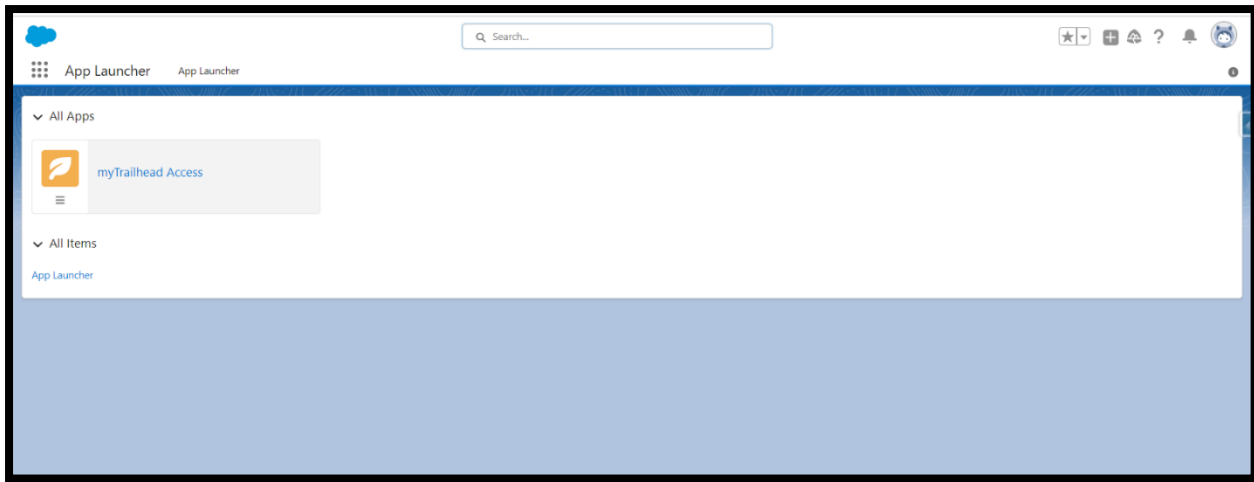
Security note re your username and password:
As per HSE Guidelines, usernames and passwords **must not be shared** with others.
Please follow the general HSE Guidelines in relation to usernames and passwords and ensure you have completed the 'Cyber Security' training course on **HSELand**.

Note: Please, whether you are a new joiner or a returning joiner, you should not proceed further to engage with the data, until you have completed or redone your training on 'myTrailhead', the learning platform, and practiced on the training system, which is called 'Train01'.
The Covax live system has client data, which is sensitive, and must be treated with the utmost caution.

Follow the steps outlined below in Section 4 to complete the final setup of security on your access to the system using a process called 'multi-factor authentication', then go to 'myTrailhead' (see Module 1A.2 which outlines the next steps in your training journey).

3.6 Reactivating your Covax Account:
Once your manager has approved you to be reactivated on the Covax system, you will receive an email detailing that your password has been reset for your reactivated account on the Covax web system.
Please make sure to check your **'spam'** or **'junk'** folder in your email for this email with the login details.

Step 1: You will receive the email from the sender: support@emea.salesforce.com .
This email address is autogenerated, it is **not** a support email, and you should **not** contact this email address if you have issues during setup.

If you require help during setup, see the FAQ's and Additional Support Section in Module 1A1

The email you will receive will look like this:
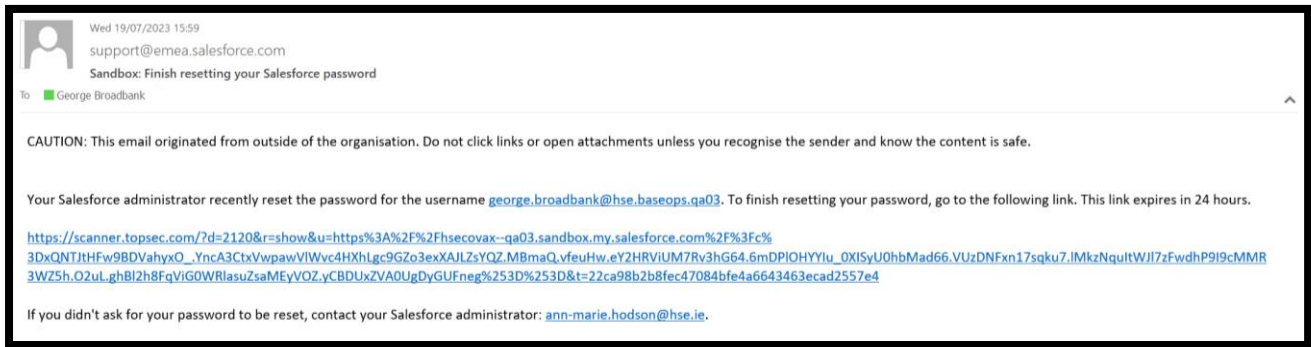
There are 3 important details on this email that you should take note of:

1. Your Covax username highlighted in blue shading above.
Note: You have 24 hours from the time you receive the email to reactivate your Covax account.
Please, make sure to reactivate your account as soon as possible, as the link will expire, and it will require additional steps to request a new one.
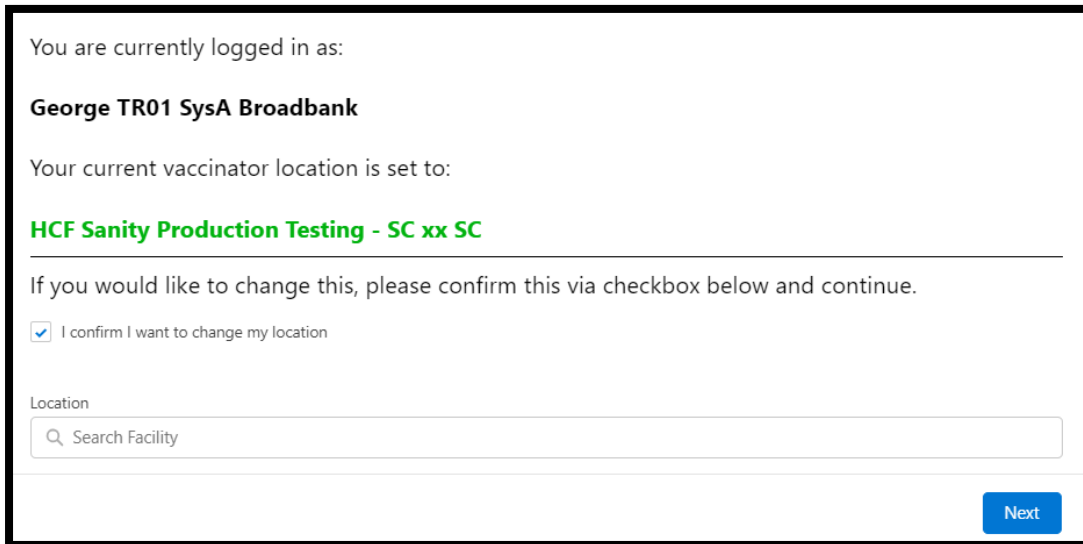2. The website link for the Covax system, which **expires in 24 hours,** highlighted in blue.
3. If you did not ask for a password reset, please raise a support case as shown in Module 1B in myTrailhead

Once you have finished resetting your password, you will be reactivated on the system. You will then be brought through to the Covax home page, which should look like the screenshot below.
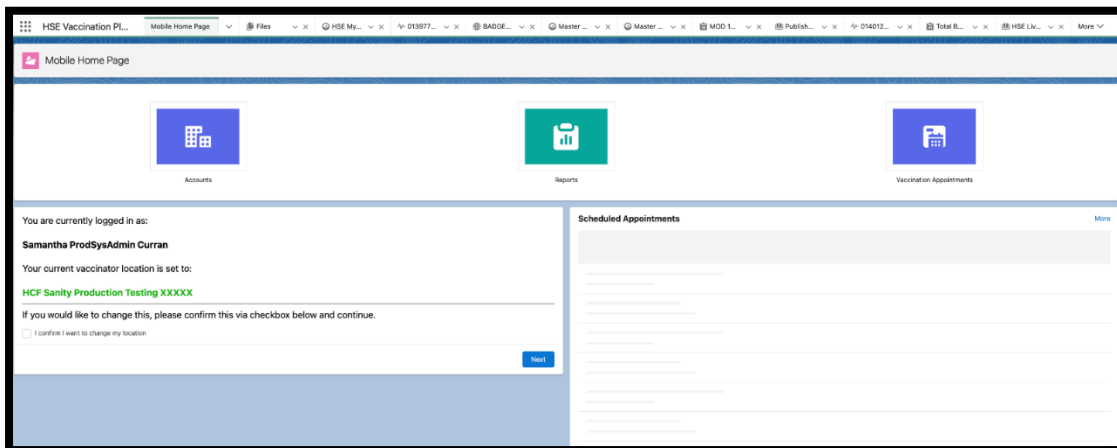
Please double check your vaccinator location is correct. If it needs updating, please click the checkbox 'I confirm I want to change my location'. Please enter your vaccination location and click 'next'

Note: Please, whether you are a new joiner or a returning joiner, you should not proceed further to engage with the data, until you have completed or redone your training on 'myTrailhead', the learning platform, and practiced on the training system, which is called 'Train01'.
The Covax live system has client data, which is sensitive, and must be treated with the utmost caution.

Follow the steps outlined below in Section 4 to complete the final setup of security on your access to the system using a process called 'multi-factor authentication', then go to 'myTrailhead' (see Module 1A.2 which outlines the next steps in your training journey).

4 Setting up – Putting Security Protection on your Access to Covax

4.1 Security Protection using the Multi Factor Authentication (MFA) method

Multi-Factor Authentication (MFA) is a security method for access to a system/application. You will use the MFA with your device and smartphone each time you log in to Covax.

It makes it more difficult for an unauthorized person to gain access to the HSE Covax platform. The process involves you providing the following pieces of evidence in order to be able to access the system.
- Something you know – example a password or a PIN
- Something you have – downloading and having an 'authenticator' smart phone app on a smart device, e.g. your smart phone.

It is mandatory that all users access Covax using MFA.

4.1.1 How it Works.
Once you have set up your Covax account with your login and password for the first time, you should complete the security setup process next.

Note: For **returning users**, if you have changed phones or deleted the app on your phone, you will need to set up MFA with your smartphone again.

4.2 Downloading the needed MFA App on your phone; 'Microsoft Authenticator'

To complete the security setup process, you will need to use a smartphone, and download an application called 'Microsoft Authenticator' App onto either your work or personal phone.

When using the app with Covax, please note the following:

- The app works offline and doesn't require an internet connection.
- The app will take up approximately 129Mb of space on your phone
- The app does not track or store personal information and is safe to use on work and personal smartphones or smart devices.

Important Note: You will not be able to use the Microsoft Authenticator on the same tablet that you are using to try to access Covax. They need to be two separate devices, i.e. a phone and a tablet.

See the step-by-step guide below, depending on which type of phone you have (Google /Android or iPhone/iOS)
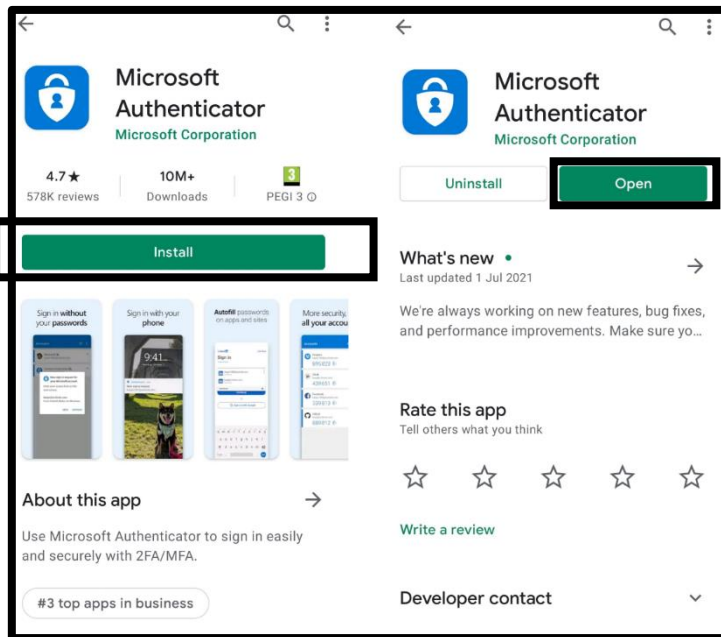
4.2.1 Android Phone Users

Please refer to the following steps when attempting to download and set up the Microsoft Authenticator App on an Android phone.

1. Click into the "Google Play store" on your phone or smart device, the icon is highlighted below. Google Play is the official app store for Android phones.

2. Type in the search bar "Microsoft Authenticator" App.
3. Once you have located the app, click on the "install" button (seen in figure A).
4. The app will then begin downloading. When the download is complete, please click on the "open" button (seen in figure B).

(Figure A)   (Figure B)

5. The next screen will show the Microsoft privacy statement.
    To proceed please click "Agree" (seen in Figure C).
6. In the next screen you will then click the "Skip" option in the top right corner of the screen(Figure D).

(Figure C)   (Figure D)

6. The rest of the set up for the "Microsoft Authenticator" App setup will continue with "MFA Setup on Covax" in Section 4.3.

4.2.2 Apple Phone users

Please refer to the following steps when attempting to download and set up the Microsoft Authenticator App on an iPhone.

1. Click into the "App Store" on your phone or smart device. App Store is the official app store for iPhones. The app icon is highlighted below.

2. In the search bar at the top, type in "Microsoft Authenticator" App.
3. Once you have located the app, click on the "GET" button (seen in figure A).
4. The app will then begin downloading. When the download is complete, please click on the "OPEN" button (seen in figure B).
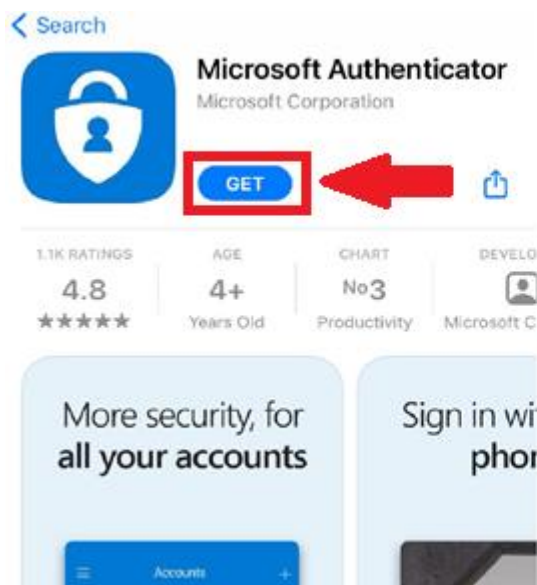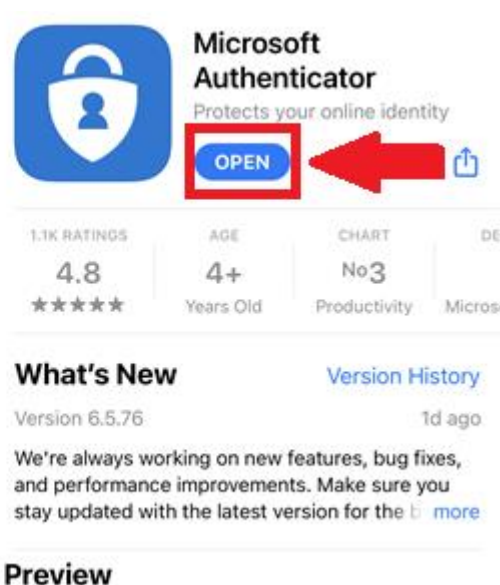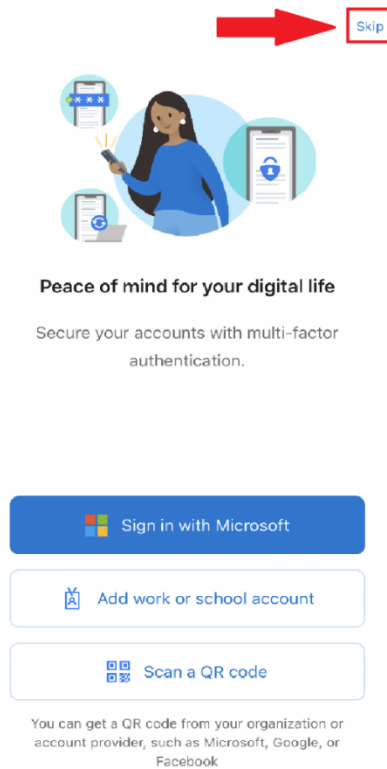

(Figure A.)   (Figure B.)

5. The next screen will show the Microsoft privacy statement.
   To proceed please click "Agree" (seen in Figure C). In the next screen you will then click the "Skip" option in the top right corner of the screen (Seen in Figure D).
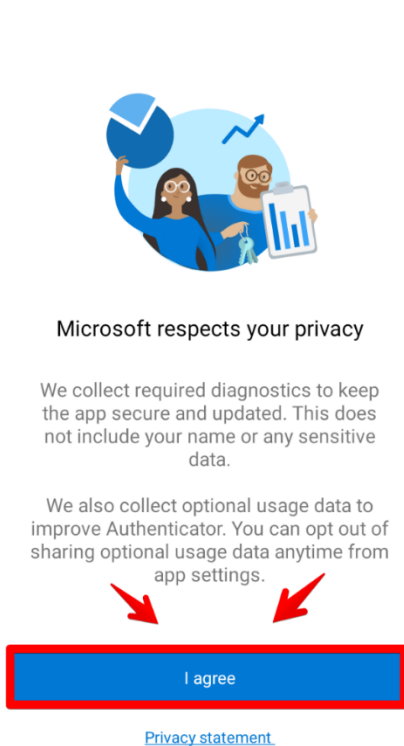
(Figure C)   (Figure D)

6. The rest of the "Microsoft Authenticator" App setup will continue with "MFA Setup on Covax" on Section 4.3.

4.3 Setting up MFA for accessing Covax

### 4.3.1 Logging into Covax for the very first time – MFA will not appear

If you are logging into Covax for the **first time**, or you have received reactivation details and logged into Covax for the first time in a while. You will **NOT** receive a prompt to set up the security feature, 'multifactor authentication' (MFA).

Note: The prompt to set up MFA will occur only once you log out, and log back in again.

1. Once you have verified your Covax account email login, and accessed the homepage of the Covax system, the next step is to sign back out again immediately in order to trigger the prompt to set up your security protection.

Note: If in the event you did not verify your account email login in time, and needed to request a password reset - once you receive this, and successfully enter the homepage of Covax - you will still need to go through the multifactor authentication security feature and log in and out again to the system.

2. You can log out by clicking on the 'View Profile' Icon in the top right-hand corner of your screen. Following this, you must then click on the "Log out" option.
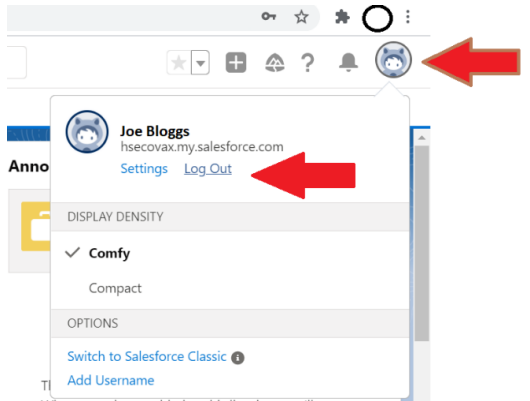
3. Once you have logged out and then logged back in again successfully using your unique username and password, a new screen will now appear asking you to setup your multifactor authentication security feature.
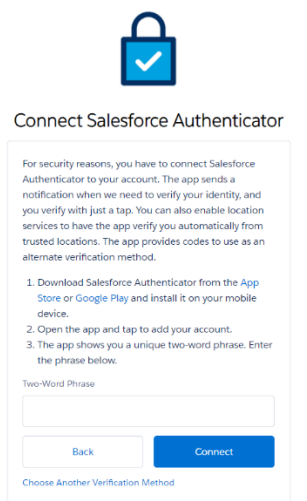
Follow the steps below which outline how to use multifactor authentication

4.3.2 How-to Guide: Using 'multifactor authentication' when accessing Covax
Please watch the following video demonstration which outline the steps in the multifactor authentication (MFA) security feature process. Click here
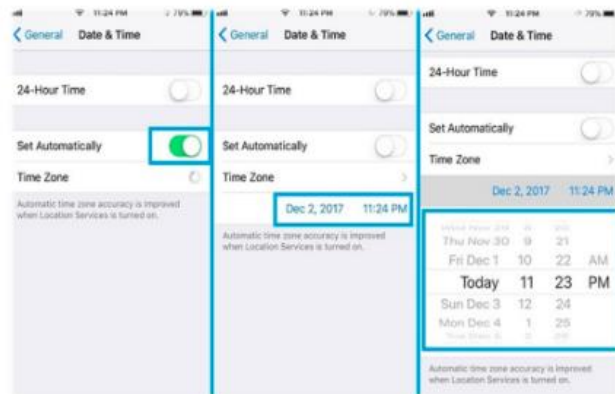
Before you setup MFA on your phone, please check the following items:

- Ensure the time and date is set to automatic on the smart device you are using and that it matches the time and date on the separate device you have used to log in to Covax.

Android
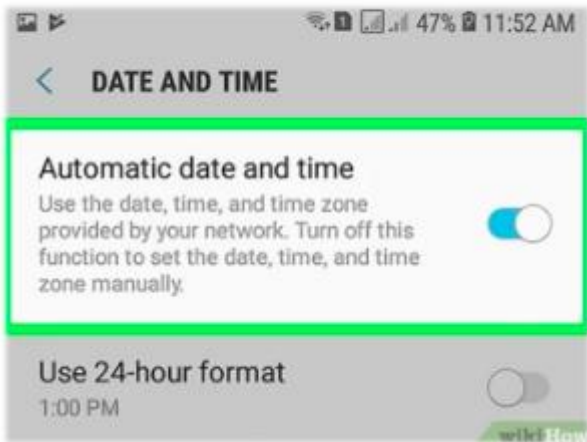
Apple

The security feature can be setup as follows:
1. Ensure you have downloaded the necessary "Microsoft Authenticator" App from the relevant app store on your smart phone (See Section 4.2 which explains how to do this).

   It is important that this app is downloaded before proceeding to the next step.

2. When you attempt to log into your Covax account with your username and password, you will be directed to the screen shown below.
   From here, you must select the **"Choose another Verification Method"** option that is highlighted at the bottom of the image.

3. You will now be asked to choose a verification method.
   You must click on the **"Use Verification Codes from an Authenticator App"** option as highlighted below.
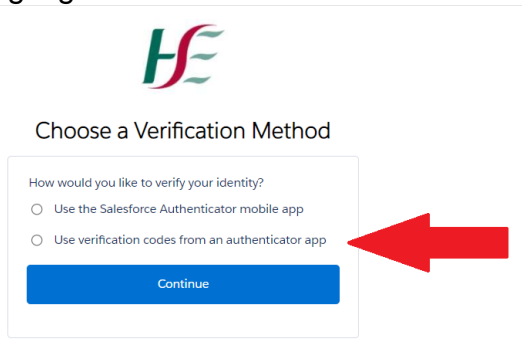
4. Now you will be asked to scan a 'QR Code'.
   You can do this by holding up your phone to scan the 'QR code' that appears on your tablet or computer screen.
   This QR code needs to be scanned by following the below steps:
   a. Open the previously downloaded "Microsoft Authenticator" app on your smart phone.
   b. In the app, click on **"Add account"** then choose **"Work or school account".**
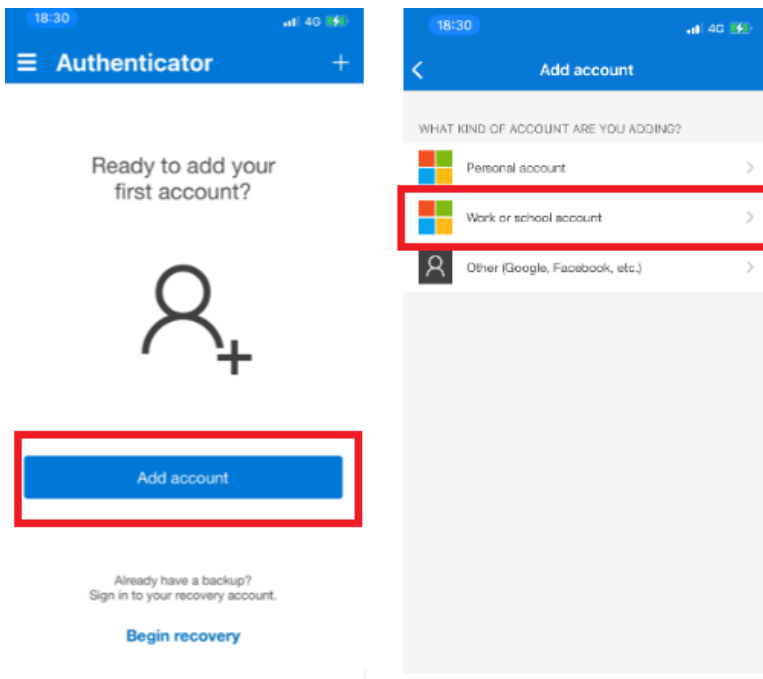
5. After clicking on "Work or school account", click on **"Scan QR code".**
   a. Once you click this, you will be asked to give the app permission to use your camera. Please click **"OK"** to proceed.
   b. The camera will be used to scan the QR code.
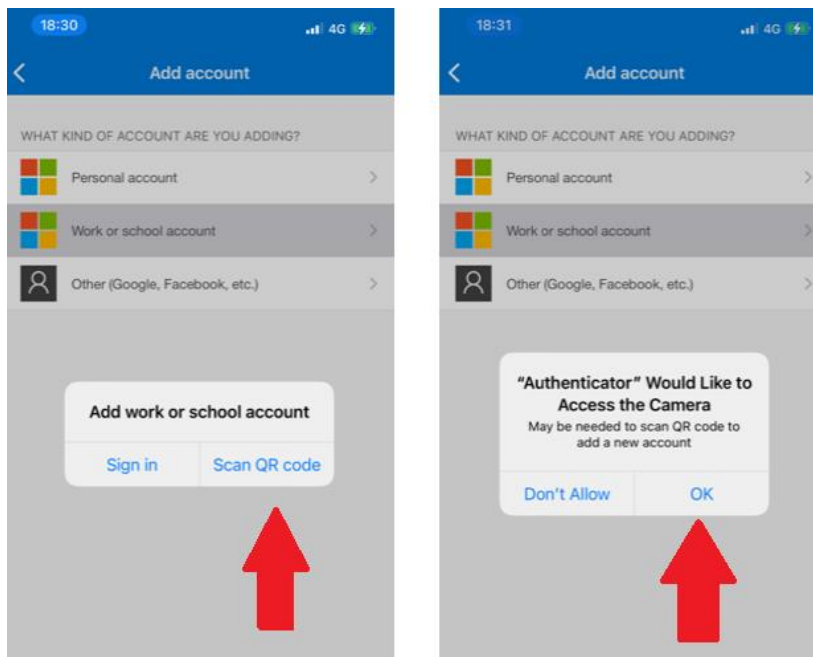
6. Your smart device should automatically open the camera on the device. You will need to scan the QR Code that appeared on your laptop/device screen.
7. Hold the camera of your phone up to face the QR black box code image.
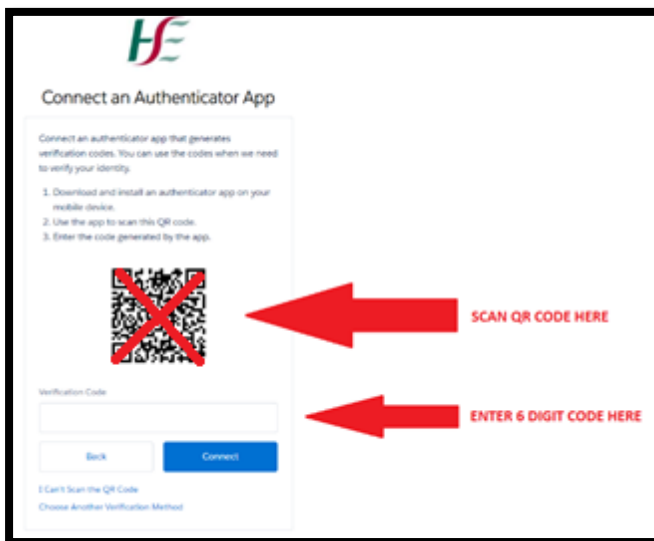
8. Once the code has been scanned by the camera on your smart device, the app will automatically show up a 6-digit verification code.
9. This code should be entered into the Verification Code field that can be seen beneath the QR code on your computer screen or tablet screen.
10. You will see there is a time limit on the code. If the time expires, it will generate a new code for you to enter.
11. Once the 6-digit code is entered on your tablet/computer that you are trying to access Covax with, then click "Connect".
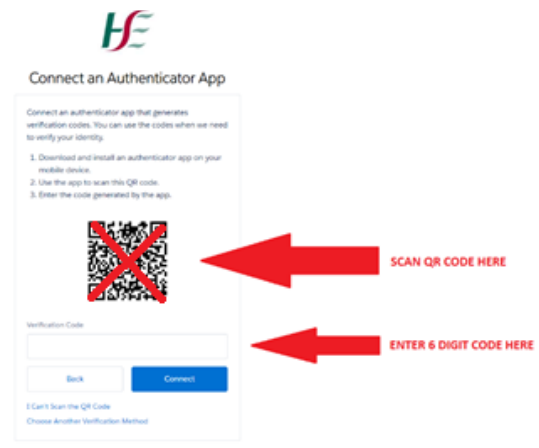
12. When this 6-digit verification code has been entered, you will now have accessed Covax and the multifactor authentication process is complete.

PLEASE NOTE THE FOLLOWING:

When you attempt to log into your Covax account again after successfully setting up MFA, you will only need to enter your username, password and the 6-digit verification code from the authenticator app on your smart device.

You will need to do this security check (MFA) each time you login to Covax, please do not delete the Microsoft Authenticator app from your phone.

It will also be necessary to 'unlock' your Microsoft Authenticator app on your smart device each time you click into it. An example of this lock screen can be seen below. This can be unlocked by entering your smart devices PIN/unlock code/fingerprint scan/faceID or relevant security measure enabled on your smart device.
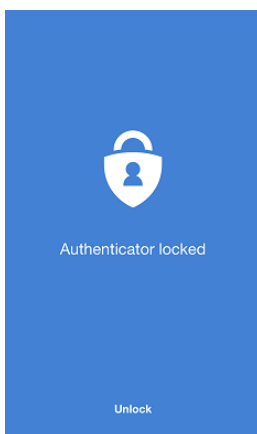
4.3.3 MFA – What to do if you are a returning user from prior e.g., last year

If you are a returning user and still have the same phone and the Authenticator app with the account for your Covax account still on it, then you can continue to use this.

You only need to set it up again if you have changed phones, deleted the app, or deleted the account on the app.

If you have a new device and have deleted the app, or deleted the account from the app, you need to contact the support team via routes outlined in '**FAQs and Additional Support'** Section.
to have the old connection disconnected.
You will then be prompted to set it up again and follow steps below to set up:

- Open the MFA app on your smartphone
- Locate and select the MFA account that is attached to your reactivated Covax account - you are specifically looking for the username of this account that matches the username on your Covax account
- Tap the "cog/+" icon at the top right hand side of your screen.
- Select "Remove Account"
- Repeat the process outlined above in 4.3.2

You have successfully now set yourself up on Covax, please proceed to Module 1A.2 which outlines the next step in your onboarding journey, training!

If you require any support with the above items, please see support avenues listed in Module 1A1 myTrailhead under the '**FAQs and Additional Support'** document.

Appendices

A. Summary table: User Access Timelines

User Access	Covax – the live system	'Train 01' Training System
User Login - Verification Link	Access as soon as possible Expires within 5 working Days	Access as soon as possible Expires within 5 working Days
Password Reset Link	Expires in 24 hours	Expires in 24 hours
Email Change Confirmation Link	Expires in 72 hours	Expires in 72 hours
User Password Expiry	90 Days	90 Days
User Deactivation	User will be deactivated over a period of non-use Note: Training Only Profile does is not deactivated	At refresh intervals
Max Password Attempts	5 (with a 30 minute lock out time after 5 attempts made)	5 (with a 30 minute lock out time after 5 attempts made)
Max Attempts for Multifactor Authentication (MFA) code	10 (with a 1 hour lockout time after the 10 invalid attempts made)	10 (with a 1 hour lock out time after the 10 invalid attempts made)

B. Supporting Documents and Links

HSE CoVax Training Page

C. Related Modules

Your Learning Journey on Covax

How to Raise a Support Request