

COVID Vaccine Certification Webinar

September 2021

The goal of this webinar is to create a flexible way to track the most accurate information about the COVID-19 vaccines. With so much changing and limited information about how this will need to be used going forward, we are opting for specific and flexible data collection.

Our end goal will look something like this:

Certification		
Order	Field	Details
<input type="checkbox"/>	1 COVID Vaccine Manufacturer	Single choice
<input type="checkbox"/>	2 Vaccine Shot #1 Date	Date
<input type="checkbox"/>	3 Vaccine Shot #2 Date	Date
<input type="checkbox"/>	4 COVID Vaccine Booster Manufacturer	Single choice
<input type="checkbox"/>	5 Booster Shot Date	Date
<input type="checkbox"/>	6 Status	Single choice

Creating a new Certification

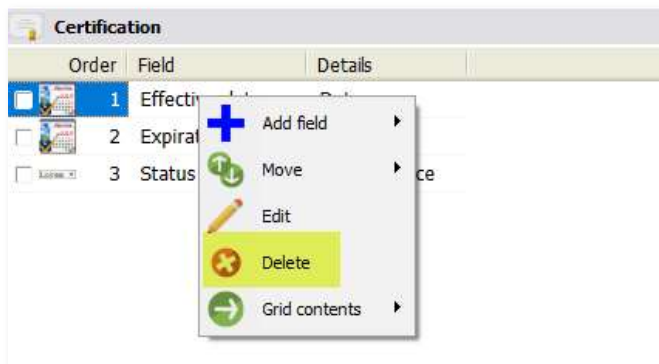
Certifications -> Create a new definition

Create a new certification called COVID Vaccine, or something similar.

Click on **Edit layout/design** on the left

You will notice the built-in data fields for *Effective date* and *Expiration date*. These are hardcoded. Since we will be tracking multiple date fields, we don't necessarily want them directly linked to these fields.

Delete these fields (**Right-click -> Delete**)



Element 1:

Add new field -> Normal

Field description: Manufacturer name

Data type: Single choice

(add) the appropriate manufacturer names: Pfizer-BioNTech, Moderna, Johnson & Johnson's Janssen.

The screenshot shows a configuration window titled "Field 'covidvaccinemanu'". It contains the following fields and options:

- Field description:** COVID Vaccine Manufacturer
- Data type:** Single choice (dropdown menu)
- Field code:** covidvaccinemanu
- Width:** 0 (with a spinner) and a checkbox for "Start a new line after this field".
- Encryption:** (no encryption) (dropdown menu)
- Report field name:** COVID Vaccine Manufacturer
- Hidden rules:** (empty text box) with checkboxes for "Hide label" and "Required".
- Links:** [Pfizer-BioNTech](#) (Pfizer-BioNTech), [Moderna](#) (Moderna), [Johnson & Johnson's Janssen](#) (Johnson & Johnson's Janssen), [\(add\)](#), [\(sort by name\)](#), [Paste list of options from Clipboard](#)
- Close** button.

Tip: Since you are going to be using this list more than once, type it up ahead in Word, Notepad, etc. and copy/paste.

Elements 2 & 3 –

Add new field -> Normal

Field description: Vaccine Shot #1

Date type: Date

Repeat for Vaccine Shot #2

The screenshot shows a configuration window titled "Field 'vaccineshot1'". It contains the following fields and options:

- Field description:** Vaccine Shot #1 Date
- Data type:** Date (dropdown menu)
- Field code:** vaccineshot1
- Width:** 0 (with a spinner) and a checkbox for "Start a new line after this field".
- Encryption:** (no encryption) (dropdown menu)
- Report field name:** Vaccine Shot #1 Date
- Hidden rules:** (empty text box) with checkboxes for "Hide label" and "Required".
- Close** button.

Element: Booster shots

If you want to create a space for a Booster shot, repeat Elements 1& 2 above to add the manufacturer and another date field. If you want to wait – this can be added when you have more information about booster requirements.

Tip: To organize the data from inside the volunteer profile, use the “Line break” checkbox so that certain data fields show up on the same line.

The screenshot shows the configuration window for a field named "shot2". The field description is "Vaccine Shot #2 Date", the data type is "Date", and the field code is "shot2". The width is set to 0, and the checkbox "Start a new line after this field" is checked. The encryption is set to "(no encryption)". The report field name is "Vaccine Shot #2 Date". The hidden rules section has checkboxes for "Hide label" and "Required". A "Close" button is at the bottom right.

Next to the configuration window is a table titled "Certification".

Order	Field	Details
1	COVID Vaccine Manufacturer	Single choice
2	Vaccine Shot #1 Date	Date
3	Vaccine Shot #2 Date	Date; Line break
4	COVID Vaccine Booster Manufacturer	Single choice
5	Booster Shot Date	Date; Line break
6	Status	Single choice

The screenshot shows a certification form with the following fields:

- COVID Vaccine Manufacturer: Moderna (dropdown)
- Vaccine Shot #1 Date: 08/01/2021 (date picker)
- Vaccine Shot #2 Date: 08/15/2021 (date picker)
- COVID Vaccine Booster Manufacturer: Pfizer-BioNTech (dropdown)
- Booster Shot Date: 09/01/2021 (date picker)
- Status: Complete (dropdown)

Final Element - Status

Click the *Status* data field and remove the default choices. Add appropriate ones. For this Webinar we used **Complete** and **Declined**.

The screenshot shows the configuration window for a field named "status". The field description is "Status", the data type is "Single choice", and the field code is "status". The width is set to 0, and the checkbox "Start a new line after this field" is unchecked. The encryption is set to "(no encryption)". The report field name is "Status". The hidden rules section has checkboxes for "Hide label" and "Required". At the bottom, there are links: "Complete (Complete), Declined (Declined) (add) (sort by name) Paste list of options from Clipboard". A "Close" button is at the bottom right.

Click **Save** and head back to the previous (properties) screen.

Special fields

The Special fields section, specifically the *Status* field and *Result* field drop-downs let you put what you need to see from the Certification in the person's file, let's choose Status in *Status* and the Booster Shot Date for the *Result*.

Certifications: 1						
Type	Effective	Expiration	Status	Type	Other	Created
COVID Vaccination	09/13/2021		Complete	08/29/2021		09/13/2021 11:13AM

You can see how these show in the profile. You can assign any field that is helpful to see here. Then **Save**, and **Save** again.

Reporting

From Advanced people search, set any groups, people types, and exclude any statuses, as appropriate. (These filters also work in other places as well.)

To see who has a certification:

+Add the Certification filter.

For this example, we will ignore the Date signed and Expiration dates.

Criteria [Load/save criteria](#)

Groups:
(no filter)

People types:
(no filter)

Exclude people with these flags:
(none)

[+ Add](#)

Certification [Edit](#) [Delete](#)
COVID Vaccination; Vaccine Shot #1
Date >= 09/01/2021; Vaccine Shot #2
Date <= 09/30/2021; COVID Vaccine
Booster Manufacturer includes Pfizer-
BioNTech, Moderna, Johnson &
Johnson's Janssen; Status includes
Complete

Certification

Type:
COVID Vaccination

Date signed: to Expiration date: to

☐ Only if not expired ☐ Only if not superseded by a newer one of the same type

☐ Require a specific count of these certifications

Scanned images:
(no filter)

Filters for COVID Vaccination:
☒ Vaccine Shot #1 Date >= 09/01/2021
☒ Vaccine Shot #2 Date <= 09/30/2021
☒ COVID Vaccine Booster Manufacturer includes Pfizer-BioNTech, Moderna, Johnson & Johnson's
☒ Status includes Complete

Use this filter to:
Keep only records that match this filter

☐ Disabled

From here we can filter on any of the fields in the certification.

Tips: If adding the filter for Vaccine Shot #1/#2 or Booster date data fields, we will want to use the "Comparison" set to:

-Greater than or equal, if searching for certifications that have had the administered shot #1/#2/Booster on a date after your chosen filter date.

- Less than or equal, if searching for certifications that have had the administered shot #1/#2/Booster on a date before your chosen filter date.

Additionally, you may even choose to use the Comparison choices for

"equals" -if searching for an exact date- or "between" -if searching for a range of dates, for this certification.

Who doesn't have a vaccine certification:

+Add the filter: Certification expired or missing, set the appropriate certification type and choose an appropriate Effective date, if applicable (It will use the date the certification was created as the effective date for this search.)

Last thought - If your organization encrypts other similar certifications, you may need to do that with this as well. Please feel free to reach out to our support team by either e-mail or phone line for more about that.

Helpful links to documentation: <https://www.vsysone.com/docs/VSys/HTMLDocs/4.0/index.htm#4352.htm>
<https://www.vsysone.com/docs/VSys/HTMLDocs/4.0/index.htm#4743.htm>