



First Nations Health Authority  
Health through wellness

## Panorama 3.2 Upgrade

Immunization Changes

June 2019

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<http://www.fnha.ca/what-we-do/communicable-disease-control/panorama>

## Table of Contents

Please Note: .....	3
Immunization User Defaults .....	4
Consent .....	6
Immunization Profile.....	8
Adding Immunizations .....	11
Reports.....	19
Forecaster .....	20
Special Considerations .....	23
Deferrals.....	26

## Please Note:

It is required for CHNs working in FN communities with Panorama access to have training with the FNHA Panorama team prior to use of the Panorama system. Panorama guides are to be used in conjunction with formal Panorama training. To arrange a training session, please contact [panorama@fnha.ca](mailto:panorama@fnha.ca)

Panorama will be undergoing a major upgrade on **July 2, 2019**. It will be upgrading from **R2.5.9 to R3.2**. This handbook will provide an overview of the major changes users will see when using the new (NextGen) system. You will notice some modules and screens will have a new look and feel, while other screens remain as the "classic" Panorama screen.

The changes noted in this handbook are not complete and only show the basic 3.2 Immunization module upgrades that most CHNs will likely use.

# Immunization User Defaults

## R.2.5.9

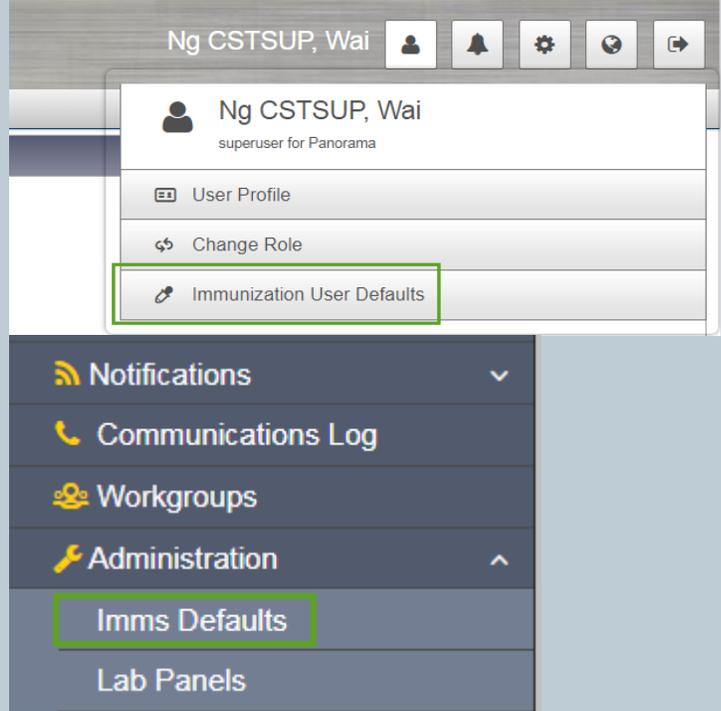
Immunizations User Defaults are accessed via My account > Immunizations Defaults menu in the banner:



in, management and control of

## R3.2

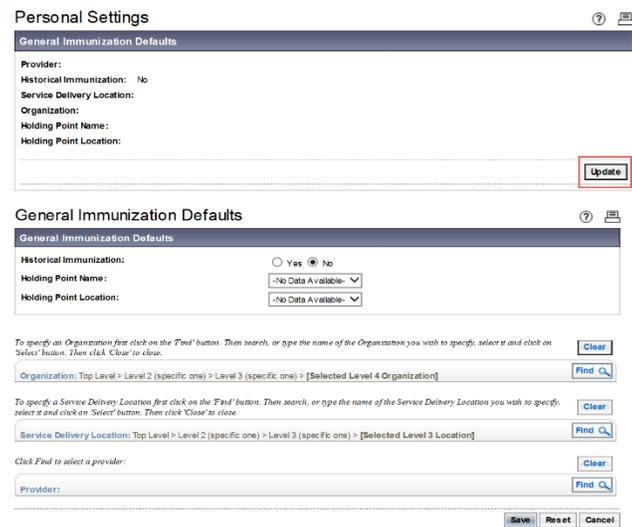
Immunizations User Defaults can be accessed via both My account > Immunizations Defaults menu in the banner and Left Hand Navigation (LHN) > Administration > Imms Defaults:



## Update General Defaults Directly:

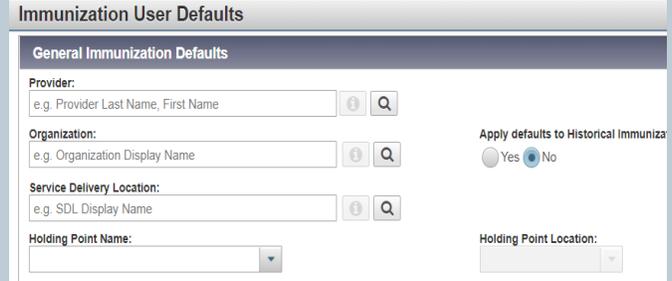
### R2.5.9

the *General Immunization Defaults* are updated on an Update screen via the **Update** button under the *General Immunization Defaults* section of the *Personal Settings* screen:



### R3.2

the *General Immunization Defaults* can be updated directly on the *Immunization User Defaults* screen, without needing to navigate to an *Update* screen via an **Update** button:





**Lot Number Details:**

R2.5.9

the selected **Lot Number** information is limited to the value displayed on the dropdown list:

**Immunizing Agent Defaults**

The screenshot shows the 'Immunizing Agent Defaults' form. It has two main fields: '\* Immunizing Agent:' with a dropdown menu showing 'Varicella', and '\* Lot Number:' with a dropdown menu showing 'AVARB698AA-CC03 Exp. 2020/03/31'. Below these fields is a checkbox labeled 'Display Expired and Recalled Lots' which is currently unchecked.

R3.2

the user can further verify the *Lot Number Details* via the **Information** (i) button to verify the details of the lot selected:

The screenshot shows the 'Immunization User Defaults' interface. A 'Lot Number Details' popup window is open, displaying the following information: Lot Number: AVARB698AA, Expiry Date: 2020 Mar 31, Manufacturer: GlaxoSmithKline, Trade Name: Varilrix, Dosage: 0.5 mL, Route: Subcutaneous, Publicly Funded: Yes, and Quantity on hand: ---. The background shows the 'Immunization Agent Lot Number Defaults' section with a dropdown menu for 'Immunizing Agent' set to 'Varicella' and a 'Lot Number' field containing 'AVARB698AA - Exp. 2020 M'.

# Consent

## Recording Consent

R2.5.9

Consent can be recorded via the Consent button from the Client Immunization Profile section from the Client Immunization View/Add screen, and the Status can be selected between "Draft" or "Confirmed".

HB	X 2019 Mar 01			
Varicella	2019 Feb 02	2019/03/18 X		

E - The date is estimated for this historical immunization.  
 O - The status for this immunization has been overridden.  
 R - The dose number for this immunization has been revised.  
 X - Some or part of the vaccine did not meet local schedule.

### Maintain Consent for Immunizations

**Warnings**

Client ID: 2643705    Name(First,Middle,Last)/Gender: Wai Test Ng / Male    Health Card No: 9856000004    Date of B: 2017 Jan  
 Phone Number: (-)    Jurisdiction Info: Richmond - HSDA,Richmond - Branch    Additional ID Type / Additional ID: Yukon HCF# / -

### Serving Client

### Current Consent Status by Immunizing Agent

Row Actions: Adenovirus Live Oral Type-4

Agent	Antigens
<input type="checkbox"/> DTaP-IPV-Hib-HB	<input type="checkbox"/> Diphtheria-D <input type="checkbox"/> HB <input type="checkbox"/> Hib <input type="checkbox"/> Pertussis <input type="checkbox"/> Polio <input type="checkbox"/> Tetanus
<input type="checkbox"/> HB	<input type="checkbox"/> HB
<input checked="" type="checkbox"/> Varicella	<input checked="" type="checkbox"/> Varicella
<input type="checkbox"/>	<input type="checkbox"/> All (selects all Antigens in the system)

### Client Directives

Create New Client Directive:

Status:  Draft  Confirmed

Instruction:  # of Doses:  \* Reason:

## Viewing Consents

R2.5.9

Existing Consent for Service Directives is accessed via the Consent button from the Client Immunization Profile section from the Client Immunization View/Add screen

R3.2

Record Consent can be performed directly from the Add Immunization modal.

1. The Consent Readiness for the client and Agent is displayed.
2. Consent can be documented by clicking Record Consent button which launches the Record Consent for Service modal, and the Status will become "Confirmed" directly.

Immunization History - Detailed Data Table

Add Immunization

Immunization Type: Non-Provider Recorded

Include non-inventoried agents

\* Agent: Varicella

\* Date Administered: 2019/03/18 hh:mm PDT

Age at Administration: 2 years 2 months 0 days

Consent Readiness: Missing

\* Reason:

Reason for Immunization:

Information Source:

---

Immunizations

Record Consent for Service

Clients: Ng, Wai Test

Consent will be recorded for agents:  Varicella

\* Instruction: Grant Reason for Refusal: Reason Description:

\* Effective From: 2019/03/18 To: yyyy/mm/dd Form of Consent:

Consent Given By:  Not Specified  Related Client  Other Relation

Consent Given To:  Not Specified  Name

Comments:

R3.2,

Existing Consent for Service Directives is displayed on the Immunization Profile screen as part of the Tab Panel of important information. This eliminates the need to navigate to the Consent screens. If required, those pages can still be accessed via the Left Hand Navigation

**Profile** ✓ Contains Data

Enter the field below to enter the default date:

View by Date

2019 Feb 21				
X 2019 Mar 01				
2019 Feb 02	2019/03/18 ✕			
▼				
▼				
▼				
▼				

If for this historical immunization, immunization has been overridden, this immunization has been revised, vaccine did not meet local schedule.

**Add Adminis**

**Special Considerations**

**Consent** **Allergies**

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**Row Actions:**

**Directive Types:** S

Directive Status	Client Instruction Applied To	Consent Given By	Comment(s)	Relevant Document(s)	Effective
Directive ID		Given How			Effecti
		Consent Given To			
<input type="checkbox"/> Confirmed 4017694	Grant For Varicella	-		<a href="#">Add New Document</a>	From 2 To:

**Tab Panel** ✓

Special Considerations 
  AEFI 
  Allergies 
  Deferrals 
  Risk Factors 
  TB Skin Test 
  IGRA Tests 
  Mass Imms Event 
  **Consent**

<input checked="" type="checkbox"/>	Directive ID ▲	Directive Status	Antigen	Instruction	Effective From	Effective To	Created by Organization
<input type="checkbox"/>	3961837	Confirmed	Zoster	Grant	2017 Jun 12	2019 Jun 12	Panorama
<input type="checkbox"/>	3961838	Confirmed	Zoster	Grant	2017 Jun 12	2019 Jun 12	Panorama
<input type="checkbox"/>	3961839	Confirmed	Zoster	Grant	2017 Jun 12	2019 Jun 12	Panorama

Total: 3 1 10

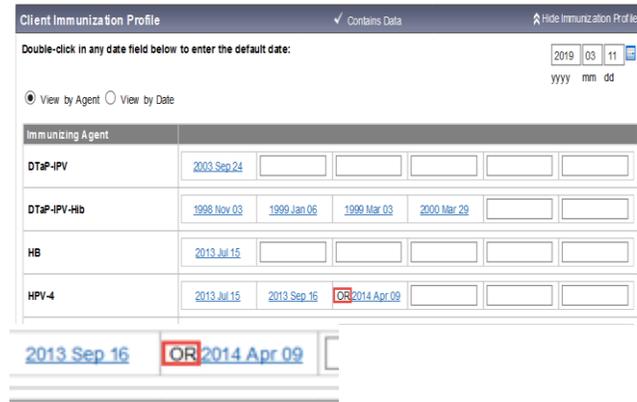
# Immunization Profile

**Summary:**

Immunization History

R2.5.9

The client's full immunization history is available in a Summary Grid, using the R/O/X/E symbols to indicate the Status in front of a date



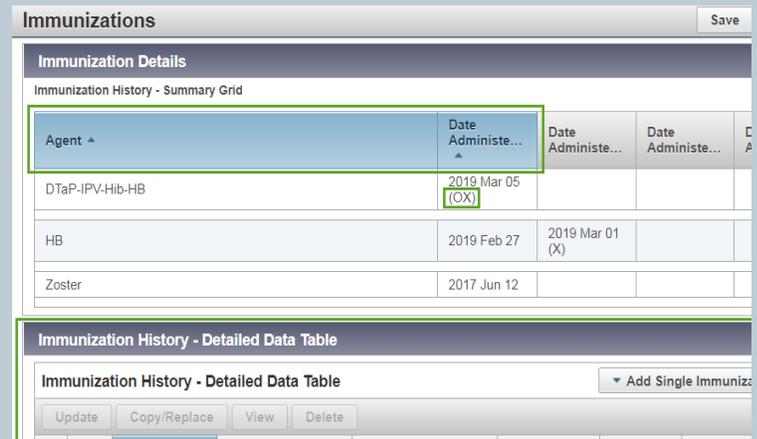
R3.2

The client's full immunization history is available both in a Summary Grid as well as in a Detailed Data Table which allows users to view more details for each immunization, and sort by any of the columns.

The compact Summary Grid displays the same information, using the R/O/X/E symbols to indicate the Status beside a date. It can be sorted by Agent or Date.

The Detailed Data Table shows each immunization on one row, and more information is available without needing to navigate to the individual record:

- The Status is spelled out, not indicated with the X and O symbols.
- A column indicates if the Revised Dose number has been revised.
- New columns show the Trade Name, Body Site and Volume (dosage) that was documented. Also provided is the Age at Administration.



Add Immunizations

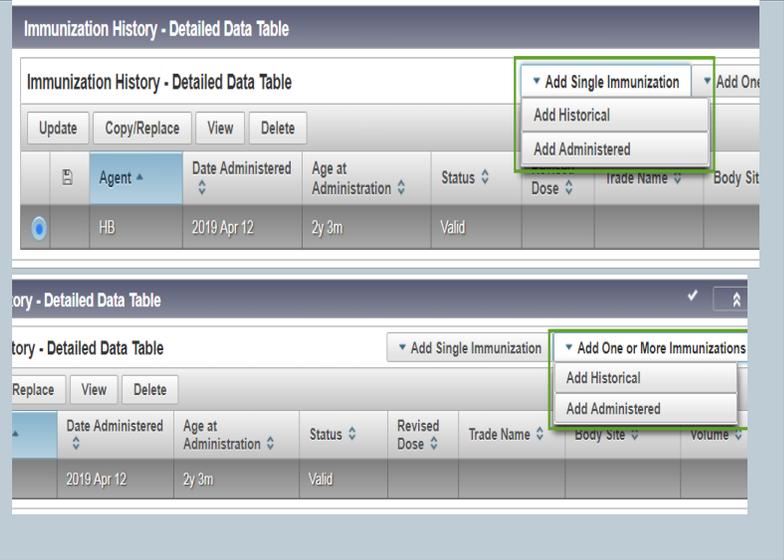
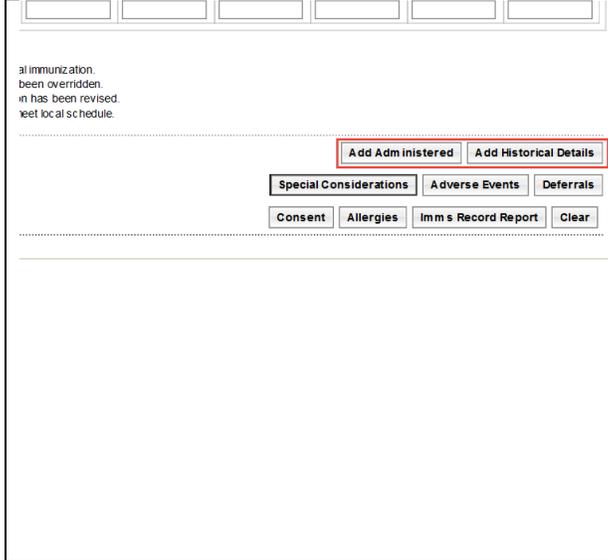
R2.5.9

The buttons for adding an immunization are all displayed below the Summary Grid:

R3.2

The buttons for adding an immunization (Historical/Administered) are grouped into menu buttons in the Detailed Data Table:

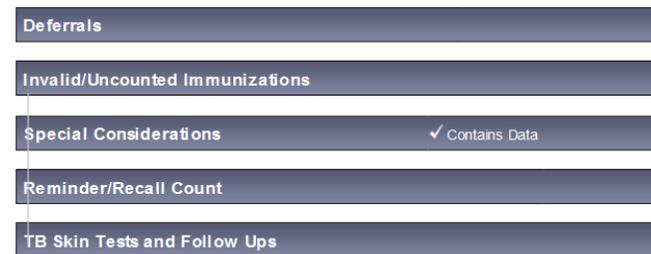
- One for adding a single immunization record, and
- Another for adding multiple records



**Tab Panel**

**R2.5.9**

The Immunization-related data is available on-screen upon scrolling:



**R3.2**

The Immunization-related data is available on-screen, within a Tab Panel, so that the user can see at a glance if data exists, and can easily view this data quickly. Each of the tabs is permission protected, so users will only see those tabs for which they have access.

Four new sections have been added to view additional information without needing to navigate to those specific screens:

- Risk Factors
- Mass Imms Event: this section displays any Mass Immunization Event that the client is attached to
- Consent
- Deferrals



**Legend Text**

R2.5.9, the Legend text is displayed on the related sections:

R3.2, the Legend text is displayed upon the Legend link (top Right hand corner of Tab) on the related section is clicked,

hence removing clutter from the page and reducing vertical scrolling:

E - The date is estimated for this historical immunization.  
 O - The status for this immunization has been overridden.  
 R - The dose number for this immunization has been revised.  
 X - Some or part of the vaccine did not meet local schedule.

**Immunization Forecast (by Agent)** ✓ Contains Data

Last forecast ran on: 2018 Nov 17 [Only available for clients who have forecasted agents or antigens]

Forecast status as of date: 2019 Mar 11

Immunizing Agent	Dose	Volume	Brand	Due
HPV-9	3			2018 Jul 01

\* - Extra dose safe antigen.  
 M - Indicates a mix of different antigen dose numbers within the Agent.  
**Due** - The recommended date for the immunization has been reached.  
**Overdue** - The recommended date for this dose has passed.  
**Up to Date** - The client is not yet due for the immunization.  
**Eligible** - The client has reached or is past the eligibility date, but is not yet due for the immunization.

Legend

E: The date is estimated for this historical immunization. May not display depending on configuration.  
 O: The status for all or part of this immunization has been overridden.  
 R: The dose number for this immunization has been revised. May not display depending on configuration.  
 X: Some or part of the vaccine did not meet local schedule.

2019 Mar 05 (OX)					
2019 Feb 27	2019 Mar 01 (X)				

Legend

EDS: Extra dose safe antigen  
 LOA: Left over antigen  
 M: Indicates a mix of different antigen dose numbers within the agent

Agent	Brand	Eligible	Due	Overdue	Status
		2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue
		2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue
		2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue
		2018 Oct 01	2018 Oct 01	2019 May 01	Due
		2019 Jan 01	2019 Jan 01	2019 Feb 01	Overdue

# Adding Immunizations

## Add Single Immunization:

### R2.5.9

An Add Immunization section under Immunization Detail Add screen is used to enter the immunization record, including the functionality of Revise Dose Number or Override Status.

The Agent is pre-selected from the previous screen (i.e. Summary Grid)

1. The Date Administered from the previous screen can be double-clicked to enter today's date.
2. Consent can be recorded from the previous screen, but not directly from this screen.
3. Upon the Save button is clicked, the record is saved to the database.

## Inventoried Agents Filter:

### R2.5.9

No filter capability is provided on the Agent list:

### R3.2

Adding immunizations can now be done directly in the Immunization Profile. An Add Immunization modal (automatically scrolled to the top of the screen) is used to enter the immunization details (e.g. Date Administered, Service Delivery Location) and the Vaccine Details (e.g. Lot Number, Site) and Comments. Some functionality is not available until the record has been saved, such as Revise Dose Number or Override Status.

1. The Agent is selected from this modal.
2. The Date Administered can be double-clicked to enter today's date.
3. Record Consent can also be performed directly from this modal.

Once the Apply button of this modal is clicked, it is listed in the Immunization History - Detailed Data Table. Since the Forecaster has not yet been run, the Status will display as blank temporarily.

Upon the Save button on the Immunizations screen is further clicked, the record is saved to the database.

### R3.2

Can include non-inventoried agents checkbox is added to allows users to filter the Agent list to display only those agents linked to Vaccines in Inventory module. It defaults to 'Include non-inventoried agents' for Historical immunizations, and defaults to exclude non-inventoried agents for Administered immunizations.

This applies to both adding single and multiple immunizations.

**Client Immunization Profile**

Double-click in any date field below to enter the default date

View by Agent  View by Date

Immunizing Agent		
DTaP-IPV-Hib-HB	2019 Feb 21	
HB	X 2019 Mar 01	
Varicella	2019 Feb 02	
<input type="text"/>		
<input type="text"/>		

**Add Immunization**

Immunization Type: Historical

Include non-inventoried agents

\* Agent:

\* Date Administered:

Trade Name Type-Ahead

R2.5.9

The Trade Name field is a free text input box:

Lot Number:

Display Expired and Recalled Lots

Trade Name:

Manufacturer:

R3.2

The Trade Name field is a type-ahead dropdown list selection, which avoids bad spellings and other junk data, and allows Forecaster to define rules based on the Trade Name reliably.

This applies to adding single/multiple immunizations, as well as updating immunization.

Site:

Route:

Trade Name:

Manufacturer:

Record Consent

ization  Add One

ation  Status  Trade Name  Body Site

Add Comments

R2.5.9, the user has to click Add button to add the entered text to the Comments table:

R3.2, the user can enter Comments to the text box directly.

- This applies to adding single/multiple immunizations, as well as updating immunization.

Comments:

(4000 characters remaining.)

Record Consent

**Add Multiple Immunizations**

R2.5.9

An Add Immunization section under Immunization Detail Add screen is used to enter multiple immunization records, by repeating the sections and fields for each record.

1. The Agents and Dates are pre-selected from the previous screen (i.e. Summary Grid)
2. The defaults applied to all immunization records are entered at the top of the screen.

Upon the Save button is clicked, all records are saved to the database.

**Enter Immunization Detail for Multiple Immunizations**

R2.5.9

The details of all immunization records are entered in the single Immunization Detail Add screen.

R3.2

Adding multiple immunizations is now done through an Add Multiple Immunizations modal that steps the user through the process.

In the first modal –

1. It allows multiple Dates to be entered against an Agent, and adding multiple Agents
2. The user can override defaults without having to navigate to the Immunization User Defaults screen. These new default values are maintained for the duration of the session, or until changed again. Under the Override/Set Defaults for New Immunizations section, it presents the details (including the Comments field) that can apply to all immunizations to be added. The user can change the values as needed.

Once the Agents, Dates and defaults are entered:

1. When entering a Historical immunization, the option to Apply Without Details is provided with a button.
2. If details are to be added, use the Enter Details button.

R3.2

If the Enter Details button is clicked, the second modal is displayed for entering details of the first immunization is presented.

1. The Agent and Date have been populated. After entering the details for an immunization, the Next button is used to apply this record and move to the next record.
2. If the record was entered in error, and the user does not want to save it, using the Delete button will remove the current record from the set being entered, and move on to the next record.
3. The user can also click the Previous button to navigate back to it to make further changes.
4. Displayed in the top right corner of the modal, is a counter indicating which record in the set is being worked on.

Once all the records from the set have been processed upon the Finish button is clicked, the page is refreshed and all the new immunization records are listed in the Immunization History - Detailed Data Table, ready to be saved. Since the Forecaster has not yet been run, the Status will display as blank temporarily.

**Add Immunization**

Next Delete Reset Print Close

**Immunization Type:** Historical

Include non-inventoried agents  
**\* Agent:**

**\* Date Administered:**  
   PDT  
 Estimated

**Age at Administration:**  
    
 years months days

**Consent Readiness:**  
Missing

**Reason for Immunization:**

**Information Source:**

**Provider:**

**Verification Status:**  
 Requested  
 Not Requested  
 Completed

**Organization:**

**Service Delivery Location:**

**Vaccine Details** ↑

Publicly Funded

**Lot Number:**  
 Display Expired and Recalled Lots  
 Show All  Publicly Funded  Non-Publicly Funded

**Dosage:**  **Dosage UOM:**

**Site:**  **Route:**

**Trade Name:**  **Manufacturer:**

**Comments:**  
  
 (4000 characters remaining.)

Next Delete Reset

Immunization History - Detailed Data Table									
Immunization History - Detailed Data Table									
<span>▼ Add Single Immunization</span> <span>▼ Add One or More Immunizations</span>									
Update	Copy/Replace	View	Delete						
	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume	
	DTaP-IPV-Hib-HB	2019 Mar 05	2y 2m	Invalid (override)					
	HB	2019 Mar 13	2y 2m						
	HB	2019 Feb 27	2y 1m	Valid					
	HB	2019 Mar 01	2y 2m	Invalid					
	Varicella	2019 Mar 13	2y 2m						
	Varicella	2019 Mar 12	2y 2m	Valid		Varilrix	Arm - Left	0.5 mL	
	Zoster	2017 Jun 12	5m 11d	Valid	1	Zostavax	Arm - Left	0.65 mL	

**View/Update/Delete Immunization**

Viewing Immunizations

R2.5.9

After saving the immunization, the Forecaster validates the immunization history and refreshes the forecast. At this point, additional information is available on the Immunization Detail screen:

1. The screen contains both Agent information, and Antigen information.
2. If Forecast has not been completed yet, the Status will display as "Valid".
3. The Dose Number and Revised Dose Number at Agent level are at the lower position of the screen.
4. All the sections are on the screen and not collapsible.

This applies to both View and Update Immunization  
Immunization Detail

Client ID: 2543705    Name (First, Middle, Last)/Gender:    Health Card No: 985600004  
 Phone Number:    Jurisdiction Info: Richmond - HSDA, Richmond - Branch    Additional ID Type / Additional ID: Yukon HCF# / -

**Immunization Detail**

Antigen Description	Dose Number	Status
Hib	1	Valid
Polio	1	Valid
HB	1	Valid
Tetanus	1	Valid
Pertussis	1	Valid
Diphtheria-D	1	Valid

\* Date Administered: 2019 Feb 21  
 Time Administered:  
 Age at Administration: 2 yrs 1 months  
 Historical: Yes  
 Information Source:  
 Lot Number:  
 Trade Name:  
 Manufacturer:  
 Publicly Funded: No  
Dose Number: 1  
 Dosage:  
 Site:  
 Reason for Immunization:  
Revised Dose Number:

Status: Valid  
 Dosage UOM: NA  
 Route:  
 Provider:  
 Revised Dose Reason:

R3.2

After saving the immunization, the Forecaster validates the immunization history and refreshes the forecast. At this point, additional information is available by clicking the View button:

1. Status Details contains both Agent information, and Antigen information.
2. The Dose Number and Revised Dose # at Agent level are right above the Dose Numbers at Antigens level.
3. All the sections on this modal are collapsible. The sections that have no data are collapsed by default. If a section is set to collapsed, that preference will be remembered for the session and the section will remain collapsed even if there is data. In all cases, if there is data present in the section, a checkmark will be visible.

This applies to both View and Update Immunization.

**Immunization History - Detailed Data Table**

Immunization History - Detailed Data Table

Update Copy/Replace View Delete

	Agent	Date Administered	Age at Administration
	DTaP-IPV-Hib-HB	2019 Mar 14	2y 2m
	HB	2019 Mar 13	2y 2m

Immunization History - Detailed Data Table

View Immunization [Apply] [Reset] [Print] [Close]

**Status Details**

IS	Agent	Dose Number	Revised Dose #	Status
<input type="radio"/>	DTaP-IPV-Hib-HB			Invalid

IS	Antigen	Dose Number	Status
<input type="radio"/>	Diphtheria-D	1	Valid
<input type="radio"/>	HB		Invalid
<input type="radio"/>	Hib	1	Valid
<input type="radio"/>	Pertussis	1	Valid
<input type="radio"/>	Polio	1	Valid
<input type="radio"/>	Tetanus	1	Valid

Immunization Details [Check] [Down Arrow]

\* Vaccine Details [Check] [Down Arrow]

Dose Revision Comments [Down Arrow]

Comments and Status Updates [Down Arrow]

[Apply] [Reset]

External Identifiers

R2.5.9, External Identifier fields do not exist.

In R3.2, External ID Type and External ID are added for External Identifiers, e.g.

- NHA CeDaR Immunization ID
- FHA PARIS Immunization ID
- VCH PARIS Immunization ID

This applies to both View and Update Immunization.

**Immunization Details**

Historical  Non-Provider Recorded  Provider Recorded

\* Date Administered: 2017/06/12 15:15 GMT Age at Administration: 5 years 11 months 11 days

Reason for Immunization: Routine Vaccine Information Source:

\* Provider: Davidson, Reuben Herbert Verification Status:  Requested  Not Requested  Completed

\* Organization: Richmond - Branch, Richmond, British Columbia \* Service Delivery Location: Richmond, Richmond

**External ID Type:** FHA PARIS Immunization ID **External ID:** 1234567890

\* Vaccine Details

Update Immunization

R2.5.9  
The Override Status and Revise Dose Number functions are available at the earlier stage of Add Immunization via the Immunization Detail Add screen, even before the record is saved, and they can only apply at the Agent level, but not the Antigen level.

R3.2  
After saving the immunization, additional functions are available by clicking the Update button:

1. Override the status via the Override Status button, and revert to the forecaster validation via the Reset Status button, are available at both the Agent level and the Antigen level.

They are also available after the record is saved via the Immunization Detail Update screen.

\*This Guide is to be used in conjunction with FNHA Panorama training

2. A dose number can be revised by using the Revise Dose Number button at the Agent level.

Immunization History - Detailed Data Table

Agent	Date Administered	Age at Administration	Status	Revised Dose
DTaP-IPV-Hib-HB	2019 Mar 14	2y 2m	Invalid	
HB	2019 Mar 13	2y 2m	Valid	

Update Immunization

Status Details

Override Status    Reset Status    **Revise Dose Number**    Reset Dose Number

Agent	Dose Number	Revised Dose
DTaP-IPV-Hib-HB		
Diphtheria-D	1	
HB		
Hib	1	
Pertussis	1	
Polio	1	
Tetanus	1	

### Delete Immunization

R2.5.9

An Immunization can be deleted via the Immunization Detail and Delete Immunization screens. Further information is not required if "Other" is selected as Reason for deletion.

R3.2,

An Immunization can still be deleted, but now this is done in a modal. If "Other" is selected as Reason for Deletion, the Other Reason must be entered.

Delete Immunization

Client ID: 2643705    Name: Wai Test Ng / Male    Health Card No: 985600004    Date of Birth / Age: 2017 Jan 1 / 2 yrs 2 months

Phone Number: (-)    Jurisdiction Info: Richmond - HSDA Richmond - Branch    Additional ID Type / Additional ID: Yukon HCP# / -

Immunization Detail

Immunizing Agent: DTaP-IPV-Hib-HB  
 Date Administered: 2019 Mar 13  
 Historical: No  
 Manufacturer: GlaxoSmithKline  
 Lot Number: A21CD285A-CC01 Exp. 2020/08/31  
 Publicly Supplied: Y  
 Immunizer: Generic Physician  
 Anatomical Site: Arm - Left  
 Anatomical Route: Intramuscular  
 Date Immunization Information Sheet Given: 2019 Mar 13

Comments

Date	Comments	Recorded By
2019 Mar 14	Revised dose number was entered or changed	Ng CSTSUP, Wai
2019 Mar 14	test	Ng CSTSUP, Wai
2019 Mar 14	All dose revisions for this immunization were reversed. The last revised dose number was 1, the last revised dose reason was 'MHO Recommendation' and the last status was Valid (override)	Ng CSTSUP, Wai

Reason for Deletion:

- Duplicate as a result of Client Merge
- Entered in error
- Other

Recorded By: Ng CSTSUP, Wai

Reason for Deletion: **Other**

Other Reason: (250 characters remaining)

Buttons: Delete, Cancel

Immunization History - Detailed Data Table

Immunization History - Detailed Data Table

Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name
DTaP-IPV-Hib-HB	2019 Mar 14	2y 2m	Invalid		Infanrix-H
HB	2019 Mar 13	2y 2m	Valid		

Confirmation

Select the reason for deletion of: DTaP-IPV-Hib-HB

Reason for Deletion: **Other**

Other Reason: (250 characters remaining)

Buttons: Confirm

**DO NOT USE – Copy/Replace function**

R3.2

There is a Do Not Use button in the Immunization History - Detailed Data Table. It will perform a Copy/Replace function, which could lead to an accidental deletion, so users should NOT click this button.



# Reports

## Imms Record Report

### R2.5.9

From Client Immunization View/Add screen, the RBCY\_IMM025-Client Immunization Record report can be launched via the Imms Record Report button:

Historical immunization has been overridden. Immunization has been revised. did not meet local schedule.

Buttons: Add Administered, Add Historical Details, Special Considerations, Adverse Events, Deferrals, Consent, Allergies, **Imms Record Report**, Clear

### R3.2

From Immunization Profile screen, the Launch Report screen will be displayed via the Launch Report button, then the following Immunization Profile related reports can be selected for launch:

- RBCY\_IMM001-Adverse Event Following Immunization (AEFI) Individual Client Record (Filters available)
- RBCY\_IMM024-Client Immunization Documentation-By Service Date (Filters available)
- RBCY\_IMM025-Client Immunization Record (Filters available)
- RBCY\_IMM048-Family Immunization Report (Filters available)

Buttons: Save, Reset, Add to WQ, **Launch Report**

Client ID: 2637869, Name: Ng, Wai Test / Male, Health Card No: 9856000004

Immunization Details: Immunization History - Summary Grid

Immunizations: Save, Reset

Launch Report

Report: RBCY\_IMM001-Adverse Event Following I...  
 RBCY\_IMM001-Adverse Event Following Immunization (AEFI) Individual Client Record  
 RBCY\_IMM025-Client Immunization Record  
 RBCY\_IMM048-Family Immunization Report

## Forecaster

Immunization Forecast by Agent/Antigen	
<p>R2.5.9</p> <ul style="list-style-type: none"> <li>• This section is titled Immunization Forecast (by Agent)</li> <li>• Leftover antigens are broken out separately into rows at the bottom of the table</li> <li>• Legend keys for special table values appears plainly below the table</li> </ul>	<p>R3.2</p> <ul style="list-style-type: none"> <li>• This section has been renamed to Immunization Forecast by Agent/Antigen to better reflect the fact that it displays the forecast for antigens that have been rolled up to agents, and also for leftover antigens (those that could not be rolled up)</li> <li>• Leftover antigens (LOA) are no longer separated out, but appear in the table according to sorting order rules                         <ul style="list-style-type: none"> <li>○ LOA is indicated in the More Info column</li> </ul> </li> <li>• Table columns are now sortable</li> <li>• 'Eligible' and 'Due' columns have been reordered with respect to each other                         <ul style="list-style-type: none"> <li>○ 'Eligible' now appears to the left of 'Due'</li> </ul> </li> <li>• New Columns:                         <ul style="list-style-type: none"> <li>'More Info' column                                 <ul style="list-style-type: none"> <li>▪ shows LOA for rows that are leftover antigen forecasts</li> <li>▪ shows EDS when the row forecasts an agent that contains one or more extra dose safe antigens</li> </ul> </li> <li>○ 'Overdue Date' column                                 <ul style="list-style-type: none"> <li>▪ Shows the date that the Forecaster calculated as when the child becomes overdue for the forecasted agent/antigen</li> <li>▪ Placed to the right of 'Due' column</li> </ul> </li> </ul> </li> <li>• Renamed columns: generally behave the same as in R2.5, but just have new column headers for clarity of purpose                         <ul style="list-style-type: none"> <li>○ Renamed 'Immunizing Agent' to 'Immunizing Agent/Antigen' renamed to take into account the new behaviour that allows forecasted antigens to appear in the table without being separated</li> <li>○ Renamed 'Dose' to 'Forecasted Dose #' makes clear that this is the dose number that will be forecasted as the next dose</li> </ul> </li> </ul>

- Renamed 'Status' to 'Forecast Status'
- Legend keys are now accessed via 'Hover Help' by hovering the mouse over the 'Legend' link
  - Only shows keys for 'M', 'EDS' and 'LOA'
  - There are no status keys anymore

There is no '\*' key (for extra dose safe antigens) anymore

Forecaster by Agent/Antigen in 2.5.9:

**Immunization Forecast (by Agent)** ✓ Contains Data ⬆ Hide Immunization Forecast (by Agent)

Last forecast ran on: 2018 Oct 20 [Only available for clients who have forecasted agents or antigens] Refresh Forecast

Forecast status as of date: 2018 Oct 31

Immunizing Agent	Dose	Volume	Brand	Due	Eligible	Status
MMR	1			2004 Feb 06	2004 Feb 06	Overdue
Polio	1			2010 Feb 06	2010 Feb 06	Overdue
Varicella	1			2016 Feb 06	2016 Feb 06	Overdue
HB	1	.5 mL		2018 Aug 07	2018 Aug 07	Overdue
Leftover Forecasted Antigen	Dose	Volume	Brand	Due	Eligible	Status
Diphtheria-d	1			2010 Feb 06	2010 Feb 06	Overdue

\* - Extra dose safe antigen.  
**M** - Indicates a mix of different antigen dose numbers within the Agent.  
**Due** - The recommended date for the immunization has been reached.  
**Overdue** - The recommended date for this dose has passed.  
**Up to Date** - The client is not yet due for the immunization.  
**Eligible** - The client has reached or is past the eligibility date, but is not yet due for the Immunization.

Forecaster by Agent/Antigen in 3.2:

**Immunization Forecast by Agent/Antigen** ✓ ⬆

Last Forecast Ran On: 2018 Oct 31 Legend

Forecast Status calculated as of: 2018 Oct 31 Refresh Forecast

Immunizing Agent/Antigen	Forecasted Dose #	More Info	Volume	Brand	Eligible	Due	Overdue	Forecast Status
MMR	1				2004 Feb 06	2004 Feb 06	2004 Mar 06	Overdue
Diphtheria-d	1	LOA			2010 Feb 06	2010 Feb 06	2010 Mar 06	Overdue
Polio	1				2010 Feb 06	2010 Feb 06	2010 Mar 06	Overdue
Varicella	1				2016 Feb 06	2016 Feb 06	2018 Feb 06	Overdue
Men-C-ACYW	1				2016 Oct 06	2016 Oct 06	2018 Feb 06	Overdue
HB	1		0.5 mL		2018 Aug 07	2018 Aug 07	2018 Sep 07	Overdue

**Immunization Forecast by Disease**

- R2.5.9
- This section is titled 'Immunization Forecast (by Disease)'
  - Legend keys for special table values appears plainly below the table

- R3.2
- This section has been renamed to 'Immunization Forecast by Disease'
  - There is no legend for this section
  - Eligible, Due and Overdue columns reordered with respect to each other in order to be consistent with Immunization Forecast by Agent/Antigen section

- There is no longer a 'Show All' entry in the 'Filter by Disease Group' drop-list
- Table columns are now sortable
- Renamed columns: generally behave the same as in R2.5, but just have new column headers for clarity of purpose
  - Renamed 'Antigen' to 'Forecasted Antigen'
  - Renamed 'Dose' to 'Forecasted Dose #' makes clear that this is the dose number that will be forecasted as the next dose
  - Renamed 'Status' to 'Forecast Status'

Forecaster by Disease in 2.5.9:

**Immunization Forecast (by Disease)** ✓ Contains Data ⬆ Hide Immunization Forecast (by Disease)

Last forecast ran on: 2019 Mar 19 [Only available for clients who have forecasted agents or antigens] Refresh Forecast

Forecast status as of date: 2019 Mar 21 Filter by Disease Group: Vaccine Preventable Disease Disease Group ▼

Disease	Antigen	Dose	Overdue	Due	Eligible	Status
Diphtheria	Diphtheria-d	1	2011 Apr 18	2011 Mar 18	2011 Mar 18	Overdue
Hepatitis B	HB	1	2016 Mar 18	2014 Nov 18	2014 Nov 18	Overdue
Measles	Measles	1	2005 Apr 18	2005 Mar 18	2005 Mar 18	Overdue
Meningococcal disease (invasive)	Men-C-ACYW	1	2019 Mar 18	2019 Apr 15	2019 Apr 15	Overdue
Mumps	Mumps	1	2005 Apr 18	2005 Mar 18	2005 Mar 18	Overdue
Pertussis	Pertussis	1	2011 Apr 18	2011 Mar 18	2011 Mar 18	Overdue
Poliomyelitis	Polio	1	2011 Apr 18	2011 Mar 18	2011 Mar 18	Overdue
Rubella	Rubella	1	2005 Apr 18	2005 Mar 18	2005 Mar 18	Overdue
Tetanus	Tetanus	1	2011 Apr 18	2011 Mar 18	2011 Mar 18	Overdue
Varicella	Varicella	1	2019 Mar 18	2017 Mar 18	2017 Mar 18	Overdue

**Due** - The recommended date for the immunization has been reached.  
**Overdue** - The recommended date for this dose has passed.  
**Up to Date** - The client is not yet due for the immunization.  
**Eligible** - The client has reached or is past the eligibility date, but is not yet due for the Immunization.

Forecaster by Disease in 3.2:

**Immunization Forecast by Disease** ✓ ⬆

Last Forecast Ran On: 2019 Mar 19  
 Forecast Status calculated as of: 2019 Mar 21 Refresh Forecast

Filter by Disease Group: Vaccine Preventable Disease Disease Group ▼

Disease ▲	Forecasted Antigen ◊	Forecasted Dose # ◊	Eligible ◊	Due ◊	Overdue ◊	Forecast Status ◊
Diphtheria	Diphtheria-d	1	2008 Mar 19	2008 Mar 19	2008 Apr 19	Overdue
Measles	Measles	1	2002 Mar 19	2002 Mar 19	2002 Apr 19	Overdue
Meningococcal disease (invasive)	Men-C-C	1	2011 Mar 19	2011 Nov 19	2013 Mar 19	Overdue
Mumps	Mumps	1	2002 Mar 19	2002 Mar 19	2002 Apr 19	Overdue
Pertussis	Pertussis	1	2001 Apr 30	2001 May 19	2001 Jun 19	Overdue
Poliomyelitis	Polio	1	2008 Mar 19	2008 Mar 19	2008 Apr 19	Overdue
Rubella	Rubella	1	2002 Mar 19	2002 Mar 19	2002 Apr 19	Overdue
Tetanus	Tetanus	1	2008 Mar 19	2008 Mar 19	2008 Apr 19	Overdue
Varicella	Varicella	1	2014 Mar 19	2014 Mar 19	2016 Mar 19	Overdue

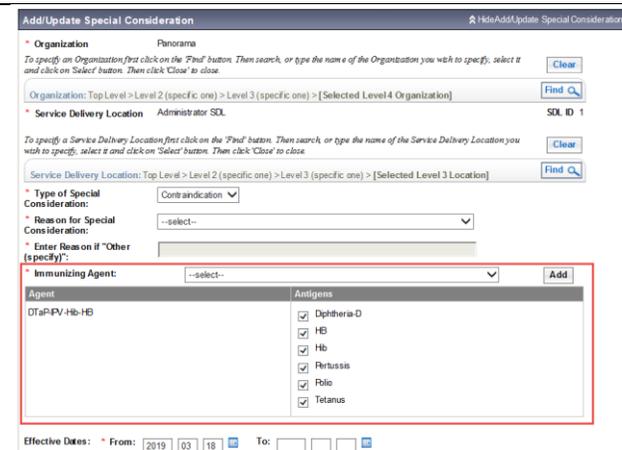
**For more in-depth discussion of this section, please refer to the PPHIS Forecaster Handbook and the Forecaster Advanced Guide, which have been updated to include changes introduced in R3.2.**

# Special Considerations

## Ways to Enter:

R2.5.

Special Considerations are entered by selecting an **Agent** (which in turn brought forward the associated **Antigens**):

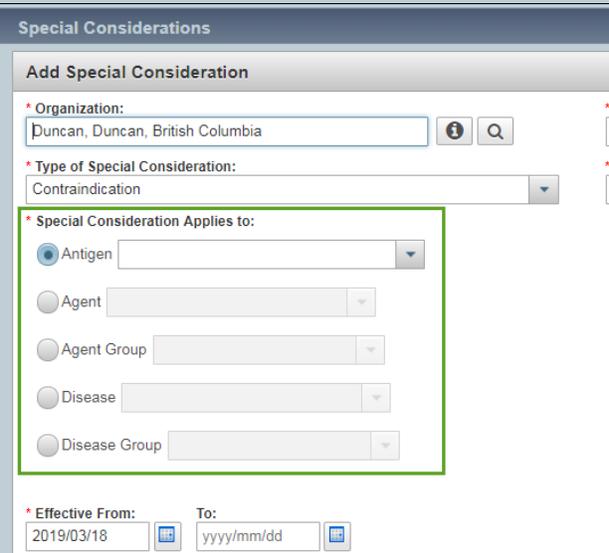


R3.2

There are 5 different ways to enter a Special Consideration:

1. Selecting an individual **Antigen**
2. Selecting an **Agent**
3. Selecting an **Agent Group**
4. Selecting a **Disease**
5. Selecting a **Disease Group**

Once created, an individual Special Consideration cannot be split into smaller components. If entered as an **Agent**, it must be updated and deleted as an **Agent**.



## Agent Group:

There are 6 **Agent Groups** available for selection to apply to a Special Consideration:

- [1] 2-4-6 months childhood immunizations
- [2] 12-18 months childhood immunizations
- [3] 4-6 years childhood immunizations
- [4] Grade 6 childhood immunizations
- [5] Grade 9 childhood immunizations
- [6] All Vaccine Preventable Disease Vaccines

When applying a Special Consideration to an **Agent Group**, the **Agents** associated with the group are displayed, and a separate Special Consideration will be created for each of these Agents.

Disease Group

there is a **Disease Group** available for selection to apply to a Special Consideration:

- Vaccine Preventable Disease Disease Group

When applying a Special Consideration to a Disease Group, the Diseases associated with the group are displayed for further deselection, and a separate Special Consideration will be created for each of the selected Diseases.

Effective To Date

R2.5.9

The Effective To Date is exclusive, that means the Special Consideration is no longer effective on the Effective To Date. (The Effective From Date is inclusive.)

R3.2

The **Effective To Date** is inclusive, that means the Special Consideration is still effective on the **Effective To Date**. (The **Effective From Date** is still inclusive.)

This applies to both adding and updating Special Consideration.

Viewing Special Considerations

R2.5.9, the Special Consideration records are saved and displayed at **Antigen** level:

R3.2, the Special Consideration records are saved and displayed as below:

1. Selecting an individual **Antigen** allows the user to create a Special Consideration for just one **Antigen**, rather than selecting **Agent** and unselecting components. The saved record will be for the single **Antigen** selected.
2. Selecting an **Agent** will no longer create a record for each **Antigen**. Only one record for the **Agent** is created. This does not change how the Forecaster deals with the Special Consideration for each **Antigen** of the **Agent**. It changes how many records are displayed to the user, anywhere Special Considerations are shown, and also in Client Warnings.
3. Selecting an **Agent Group** allows the user to select once, but generate multiple records using the same details – so one record per **Agent** in the **Agent Group** is saved for the client (the record looks no different than if it had been entered as a single **Agent**).
4. Selecting a **Disease** allows the user to create a Special Consideration for just one Disease, the saved record will be for the single **Disease** selected.
5. Selecting a **Disease Group** allows the user to select once, but generate multiple records using the same details – so one record per **Disease** in the **Disease Group** is saved for the client (the record looks no different than if it had been entered as a single **Disease**).

Special Consideration			
Antigen	Type	Special Consideration	Effective From
Diphtheria-D	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18
HB	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18
Hib	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18
Pertussis	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18
Polio	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18
Tetanus	EXEMPTION	<a href="#">Client Refusal</a>	2019 Mar 18

Special Considerations				
Update View Delete				
	Type	Applies To	Antigen/Agent/Dise...	Reason
<input type="radio"/>	Contraindication	Antigen	HB	Family history of congenital immunodeficiency
<input type="radio"/>	Exemption	Agent	HPV-9	Client Refusal
<input type="radio"/>	Exemption	Agent	Varicella	Client Refusal
<input type="radio"/>	Exemption	Disease	Hepatitis A	Parental/Guardian Refusal
<input type="radio"/>	Exemption	Disease	Influenza	Parental/Guardian Refusal
Total: 5			1	

# Deferrals

## Viewing Deferrals

R2.5.9  
The Deferrals are displayed in the Deferrals section on the Client Immunization View/Add screen:

**Client Immunization View/Add**

Client ID: 2643705 | Name(First,Middle,Last)/Gender: Wai Test Ng / Male | Health Card No: 9856000004  
 Phone Number: (-) | Jurisdiction Info: Richmond - HSDA,Richmond - Branch | Additional ID Type / Addition: Yukon HCIP# / -  
 Wait Queue:

Client Immunization Profile  Contains Data

Antigen Count  Contains Data

Immunization Forecast (by Agent)  Contains Data

Immunization Forecast (by Disease)  Contains Data

**Deferrals**  Contains Data

Immunizing Agent	Reason	Effective From
HB	No Valid Consent	2019 Mar 01

Invalid/Uncounted Immunizations

R2.5.9, the Deferrals are added or updated via the Deferrals button under the *Immunization Profile* section of the *Client Immunization View/Add* screen:

2019 Feb 21

2019 Feb 02

historical immunization has been overridden. Immunization has been revised. It did not meet local schedule.

Add Administered | Add Historical Details

Special Considerations | Adverse Events | **Deferrals**

Consent | Allergies | Immunization Record Report | Clear

## Warning for Recorded Immunization

R3.2  
The Deferrals are still displayed in the *Immunization Profile* screen, but are now as part of the *Tab Panel* section of important information:

**Immunizations**

Self-ID Missing

Client ID: 2637869 | Name(Last, First Middle) / Gender: Ng, Wai Test / Male | Health Card No: 9856000004  
 Phone Number: - | Address: - | Additional ID Type / Yukon HCIP# / -

**Immunization Details**

**Immunization History - Detailed Data Table**

**Tab Panel**

Special Considerations | AEFI | Allergies | **Deferrals** | Risk Factors | TB Skin Test

Type	Applies To	Antigen/Agent/Dise...	Reason
Exemption	Agent	Varicella	Parental/Guardian Refusal
Total: 1			1

**Antigen Count**

R3.2, the Deferrals are added or updated via the Left Hand Navigation (LHN) > Deferrals under the *Immunization Profile* section of the *Client Immunization View/Add* screen:

Immunization

Deferrals

Self-ID Missing

Client ID: 2637869 | Phone Number: -

Deferrals

Update | Delete

Immunization

HB

Total: 1

R3.2, Deferrals contain Comments field:

**Deferrals**

**Add Deferrals**

Immunizing Agent:  Reason:

Effective From:  To:

Comments:

(2000 characters remaining)

R2.5.9, no Warning is displayed for active Deferral upon recorded Immunization:

R3.2  
A Warning message is displayed when an active deferral exists when Apply or Save an Immunization record for the same Client and Agent on the Date Administered.

The screenshot shows the FNHA Panorama interface. At the top, there are buttons for 'Save', 'Reset', and 'More', along with icons for 'log', printing, help, and a notification bell. Below this, the client information is displayed: 'Client Card No: 000004' and 'Date of Birth / Age: 2017 Jan 01 / 2 years 2 months'. A table with columns 'Date Administe...' and 'Date Administe...' is visible. A row in the table has '2019 Mar 01 (X)' highlighted in green. Two messages are overlaid on the screen: a warning message with a yellow triangle icon stating 'You have created an immunization record for HB administered on 2019 Mar 01 for which an active deferral exists.' and an information message with a blue 'i' icon stating 'The Client Immunization Profile was successfully updated.'