

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

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# 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 <u>conjunction</u> with formal Panorama training. To arrange a training session, please contact <u>panorama@fnha.ca</u>

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:

Wai No CSTSLP: superuser for Panorama

# 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:

Threshold Notifications: 0 Jurisdiction Notifications: 0 Hel	p Contact Us <u>Mv Account</u> Logout User Profile	Ng CSTSUP, Wai 🔺 🌲 😵 😁
IMMUNIZATION FAMILY HEALTH	INVENTORY Immunizations Defaults Immunization Preferences Mathematical Notification Preferences Network Speed Test	Ng CSTSUP, Wai     superuser for Panorama      User Profile
		Change Role     // Immunization User Defaults
		Notifications Communications Log
		A Workgroups
		Administration
		Imms Defaults Lab Panels
Indate Coneral Defaul	ts Directly:	

Update General Defaults Directly:	
R2.5.9	R3.2
the General Immunization Defaults are updated on an	the General Immunization Defaults can be updated directly
Update screen via the <b>Update</b> button under the	on the Immunization User Defaults screen, without needing
General Immunization Defaults section of the Personal	to navigate to an <i>Update</i> screen via an <b>Update</b> button:
Settings screen:	Immunization User Defaults

Personal Settings ⑦	General Immunization Defaults
General Immunization Defaults Provider: Historical Immunization: No Service Delivery Location: Organization: Holding Point Location: Holding Point Location: Update	Provider:       e.g. Provider Last Name, First Name       Image: Comparization:       Image: Comparization Display Name         Organization Display Name       Image: Comparization Display Name       Image: Comparization Display Name       Image: Comparization Display Name         Service Delivery Location:       Image: Comparization Display Name       Image: Comparization Display Name       Image: Comparization Display Name         e.g. SDL Display Name       Image: Comparization Display Name       Image: Comparization Display Name       Image: Comparization Display Name
General Immunization Defaults ⑦	Holding Point Name:
Historical Immunization: O Yes ® No Holding Point Name: -No Data A valable: V Holding Point Location: -No Data A valable: V	
To specify an Organization from check on the Ford busins. Then search, or type the name of the Organization you with to specify, select at and clock on Electric Value.  Organization: Top Levi b Levi's Clock:  Organization: Top Levi's Levi's (specific one) > Levi's (specific one) > [Selected Leviel 4 Organization]  Find Ca	
where it and clock as Silect human. Then clock Clock to clock Service Delivery Location: Top Level > Level 2 (specific cme) > Level 3 (specific cme) > Eelected Level 3 Location Find Q	
CleAF Ped to select a provider:	
Seve Reset Cancel	

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

Anato	omica	I Admin Site Defaults		
Upo	date	Delete		
	8	Immunizing Agent 🔺	Anatomical Site 🗘	Min Age ≎
		Rotavirus	Mouth	2 mo.
Total	: 1			
Immu	ınizati	on Agent Lot Number Defaults		
Upo	date	Delete		
		Immunizing Agent 🔺		Lot Number 🔇
		DTaP-IPV-Hib-HB		A21CD089A
Total	:1			
R3.2				
		<u> </u>		- · · ·

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

# Immunizing Agent Defaults

Immunizing Agent Defaulte			Ininiunization 0:		15	
minumizing Agent Delauits			Lot Number Details	×		
* Immunizing Agent: * Lot Number: Display Expired and Recalled Lots	Varicella V AVARB698AA-CC03 Exp. 2020/03/31	<b>V</b>	Lot Number: AVAR Expiry Date: 2020 Manufacturer: Glaxo Trade Name: Vanini Dosage: 0.5 m Route: Subcr Publicly Funded: Yes Quantity on hand:	B698AA Mar 31 SmithKline K K L Itaneous	• • • • • • • • • • • • • • • • • • •	Anato
			Immunization Agen Add Immunization * Immunizing Agent Varicella	nt Lot Numbe	er Defaults lumber Defa	ults

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

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panorama@fnha.ca

Holding Po

Lot Number:
 Display Expired and Reca
 Show All Publicly Fun
 AVARB698AA - Exp. 2020 M

# Consent

Recording Cons	ent	
R2 5 9		R3.2
Consent can be r from the Client Ir the Client Immur Status can be sel "Confirmed".	ecorded via the Consent button mmunization Profile section from nization View/Add screen, and the ected between "Draft" or	<ul> <li>Record Consent can be performed directly from the Add Immunization modal.</li> <li>1. The Consent Readiness for the client and Agent is displayed.</li> <li>2. Consent can be documented by clicking Record Consent</li> </ul>
Varicella	2019 Feb 02 2019/03/18 ×	button which launches the Record Consent for Service
<b>~</b>		modal, and the Status will become "Confirmed" directly.
~		Immunization History - Detailed Data Table
~		Add Immunization Record Consent Apply
E - The date is estimated for this histor O - The status for this immunization ha R - The dose number for this immuniza X - Some or part of the vaccine did no	ical immunization. Is been overridden. Iton has been revised. It meet local schedule. Add Ad	Immunizations       * Date Administered:       Age at Administration:         * Age nt:       2019/03/18       hh.mm       PDT       2       years         Varicella       * Reason:       * Reason:       months       days         Resson for Immunization:       * Information Source:       *       *       Months         Immunizations       Save       Reset * Months       *       Months
Maintain Consent for I	Ide_Last/Gender:       Health Card No:       Date of E         ie       9855000004       2017 Jan         ic       Additional ID Type / Additional ID:         ic       Additional ID Type / Additional ID:         ic       Contains Data         izing Agent       Image: Contains Data         ic       Add         ie       Image: Contains Data         is       Image: Contains Data	Ng, Wai Test     Instruction:     Reason for Refusal:     Orient Given By:     Consent Given By:     Not Specified     Instruction:     Other Relation     Other Relation
Viewing Consen	ts	
R2.5.9 Existing Consent via the Consent b Immunization Pro Immunization Vie	for Service Directives is accessed outton from the Client ofile section from the Client ew/Add screen	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

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

			Tab Pan	el								
			Spec	cial Considerations	AFFI	Allergies	✓ Deferrals	Risk Factors	TB Skin Test	IGRA Tests	✓ Mass Imms Event	✓ Consent
			· opoc			7 morgiou	· Denontano		10 0100 1000	1010110000		· · · · · · · · · · · · · · · · · · ·
			☑	Directive ID 🔺	Dire ¢	ctive Status	Antigen 🗘	Instru	ction 🗘	Effective From 4	Effective To 🗘	Created Organiza
			0	3961837	Con	firmed	Zoster	Grant		2017 Jun 12	2019 Jun 12	Panoram
			0	3961838	Con	firmed	Zoster	Grant		2017 Jun 12	2019 Jun 12	Panoran
			0	3961839	Con	firmed	Zoster	Grant		2017 Jun 12	2019 Jun 12	Panorar
	J  L		Total	1: 3								
Special Cons Consent	Add Adminis iderations Altergies Directive Relevant Document(s)	e Types: S e) <u>Effecti</u> Fffecti										
ent Given To	Add New Document	From 2										
	Special Consent	Add Adminis	Add Admini         Special Cons iderations         Cons ent         Allergies         Delete         Delete	Add Adminit         Special Cons iderations         Cons ent         Allergies         Delete         Directive Types:         Sector By         Comment(s)         Relevant Document(s)         Effect         How         ent Given To	Add Adminis         Special Cons ider ations         Cons ent         Allergies         Delete         Directive Types:         Set Given By         Comment(s)         Relevant Document(s)         Effectit	Image: Special Cons iderations         Cons ent       Allergies         Delete       Directive Types: [S]         ent Given By thow ent Given To       Relevant Document(s)	Add Adminis         Special Cons iderations         Consent       Allergies         Delete       Directive Types:         Bent Given By How ent Given To       Relevant Document(s)       Effect Effect	Image: Construction of the status       Antigen C         Image: Construction of the status       Antigen C         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of the status         Image: Construction of the status       Image: Construction of th	Add Adminis         Special Cons iderations         Cons ent         Allergies         Difective Types:         Sette         Difective Types:         Sette         Difective Types:         Sette         Difective Types:         Sette	Image: Constant Antigen	Add Adminis         Special Cons kiterations         Consern Allergies	Image: Contrast of the structure of the str

# **Immunization Profile**

# Summary:

2013 Sep 16

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

Client Immunization Prof	ile	✓ Contains Data	A Hide Immunization Profile
Double-click in any date field	below to enter the default date: y Date		2019 03 11 📰 yyyy mm dd
Immunizing Agent			
DTaP-IPV	2003 Sep 24		
DTaP-IPV-Hib	<u>1998 Nov 03</u> <u>1999 J</u>	an 06 1999 Mar 03 2000 Mar 29	
нв	2013 Jul 15		
HPV-4	2013 Jul 15 2013 S	ep 16 OR 2014 Apr 09	
ì	1	1-	

OR 2014 Apr 09

### 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.

	Immunizations			Save
	Immunization Details			
	Immunization History - Summary Grid		_	
	Agent 🔺	Date Administe	Date Administe	Date E Administe A
	DTaP-IPV-Hib-HB	2019 Mar 05 (OX)		
	НВ	2019 Feb 27	2019 Mar 01 (X)	
	Zoster	2017 Jun 12		
	Immunization History - Detailed Data Table			
	Immunization History - Detailed Data Table		· • ,	Add Single Immuniza
	Update Copy/Replace View Delete	9		
Add Immunizations				
R2.5.9	R3.2			

R2.5.9	R3.2			
The buttons for adding an immunization are all	The buttons for adding an immunization			
displayed below the Summary Grid:	(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			

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

	Immunization History - Detailed Data Table
al Immunzation, been overridden, in has been revised. eet local schedule. Add Adm inistered Add Historical Details Special Considerations Adverse Events Deferrals Consent Allergies Imm s Record Report Clear	Immunization History - Detailed Data Table <ul> <li>Add Single Immunization</li> <li>Add Add Historical</li> <li>Add Add Add Add Add Add Add Add Add Add</li></ul>
Tab Panel         R2.5.9         The Immunization-related data is available on-         screen upon scrolling:         Deferrals         Invalid/Uncounted Immunizations         \$pecial Considerations         \$pecial Considerations         Reminder/Recall Count         TB Skin Tests and Follow Ups	<ul> <li>R3.2</li> <li>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.</li> <li>Four new sections have been added to view additional information without needing to navigate to those specific screens: <ul> <li>Risk Factors</li> <li>Mass Imms Event: this section displays any Mass Immunization Event that the client is attached to</li> <li>Consent</li> <li>Deferrals</li> </ul> </li> </ul>
Tab Panel	✓ 👔
Special Considerations AEFI Allergies Seferrals	Risk Factors TB Skin Test IGRA Tests Mass Imms Event V Consent IHI
Type Applies To Antiger	en/Agent/Dise Reason $\diamond$ Effective From $\diamond$ Effective To $\diamond$
Exemption Agent Varicella	la Parental/Guardian 2017 Jun 12 2018 Jun 12
Total: 1	
Legend Text	
R2.5.9, the Legend text is displayed on the rela sections:	R3.2, the Legend text is displayed upon the Legend link (top Right hand corner of Tab) on the related section is clicked,

E - The date is estimated for this historic al immunization. O - The status for this immunization has been everyleden. R - The date is estimated for this immunization has been everyleden. X - Some or part of the vac cine did not meet local schedule. Immunization Forecast (by Agent)  Contains Data ast forecast cast cast cast cast cast cast cast		×			hend	ce removir	ng clutter fi	rom the pa	age and ree	ducing verti		
<ul> <li>The date is estimated for this historic al immunization.</li> <li>The date is estimated for this historic al immunization. has been verifiden.</li> <li>The dose number for this immunization has been revised.</li> <li>Some or part of the vaccine did not meet local schedule.</li> <li>The dose number for this immunization has been revised. It is not yet due for the immunization as been revised. May not display depending on configuration.</li> <li>The dose number for this immunization has been revised. May not display depending on configuration.</li> <li>The date is estimated for this historic al immunization has been revised. May not display depending on configuration.</li> <li>The date is estimated for this historic al immunization has been revised. May not display depending on configuration.</li> <li>The date is estimated for this historic al immunization has been revised. May not display depending on configuration.</li> <li>Some or part of the vaccine did not meet local schedule.</li> <li>2019 Feb 27</li> <li>2019 Mar 01</li> <li>2019 Feb 27</li> <li>2019 Mar 01</li> <li>2019 Feb 27</li> <li>2019 Mar 01</li> <li>Encicent many different antigen dose numbers within the agent tere ommended date for the immunization.</li> <li>The client has reached or is past the eliphility date, but is not yet due for the immunization.</li> <li>The client has reached or is past the eliphility date, but is not yet due for the immunization.</li> <li>The client has reached or is past the eliphility date, but is not yet due for the immunization.</li> </ul>		•			scro	lling:						
E - The date is estimated for this instorce all immunication. As been overridden. R - The dose number for this immunication has been revised. X - Some or part of the vaccine did not meet loc all schedule. E - The date is estimated for this historical immunication. May not display depending on configuration. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The dose number for this immunication has been overridden. R - The date is estimated for this historical immunication. May not display depending on configuration. R - The date is estimated for this historical immunication. R - The date is estimated for this historical immunication has been reverted. Some or part of the vaccine did not meet to call schedule. 2019 Mar 01 (OX) 2019 Feb 27 2019 Mar 01 (OX) 2019 Feb 27 2019 Mar 01 (OX) 2019 Feb 27 2019 Mar 01 2019 Feb 27 2019 Mar 01 (OX) EDS: Extra dose safe antigen Lock Left over antigen M: Indicates a mix of different antigen dose numbers within the agent EDS: Extra dose safe antigen Lock Left over antigen M: Indicates a mix of different antigen dose numbers within the agent EDS: Extra dose safe antigen Lock Left over antigen M: Indicates a mix of different antigen dose numbers within the agent EDS: Extra dose safe antigen Lock Left over antigen 2018 Jan 01 2018 Ja			· · · · · · · · · · · · · · · · · · ·							✓ 👔		
Immunization Forecast (by Agent)       Image: Contains Data         asst forecast ran on: 2018 Nov 17       [Only available for clients who have forecasted agents or antgr         precast status as of date: 2019 Mar 11       Immunizing Agent       Dose       Volume       Brand       Due         - Extra dose safe antigen       a       2019 Feb 27       2019 Mar 01       Immunization       Immunization has been reached.         Neer The recommended date for the immunization has been reached.       Neer Use recommended date for the immunization has been reached.       Immunization       Immunization       Immunization         Biglible - The client has reached or is past the elgibility date, but is not yet due for the immunization       Immunization       Immunization       Immunization       Immunization         Biglible - The client has reached or is past the elgibility date, but is not yet due for the immunization       Immunizat	<ul> <li>E - The date is estimated for this historical immunization.</li> <li>O - The status for this immunization has been overridden.</li> <li>R - The dose number for this immunization has been revised.</li> <li>X - Some or part of the vaccine did not meet local schedule.</li> </ul>					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 configura X: Some or part of the vaccine did not meet local schedule.						
Ast forecast ran on: 2018 Nov 17 [Only available for clients who have forecasted agents or antige orecast status as of date: 2019 Mar 11 <u>Immunizing Agent Dose Volume Brand Due</u> <u>HPV-9 3 2018 Juno</u> : - Extra dose safe antigen. We - Inde cates a mix of different antigen dose numbers within the Agent. Super Use - The recommended date for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the immunization. Biglible - The client has reached or is past the eigblity date, but is not yet due for the imm	nmunization Forecast	t (by Agent)	~	Contains Data		2019 Mar 05 (OX)						
Immunizing Agent       Dose       Volume       Brand       Due         HHV-9       3       2018 Juliot       Immunizing Agent       2018 Juliot         Extra dose safe antigen. Mu- Indicates a mix of different antigen dose numbers within the Agent. Due - The recommended date for this dose has passed. Up to Date - The client is not yet due for the immunization.       EDS: Extra dose safe antigen LOA: Left over antigen       EDS: Extra dose safe antigen LOA: Left over antigen         Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.         Immunizity adde action is past the eligibility date, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.         Immunizity adde action is past the eligibility date, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.       Immunizity adde, but is not yet due for the immunization.         Immunizity adde, addition additis addition a	ast forecast ran on: 2018 orecast status as of date	Nov 17 [Only available 2019 Mar 11	for clients w ho have f	orecasted agents or antige		2019 Feb 27	2019 Mar 01 (X)					
- 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 client is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for the immunization. Biglible - The client has reached or is past the eligibility date, but is not yet due for	lmmunizing Agent HPV-9	Bose 3	Volume	Brand Due 2018 Jul 0:						× 🔅		
Iter         Ditate         Iter         Status ©           2018 Jan 01         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 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	<ul> <li>Extra dose safe antigen.</li> <li>M - Indicates a mix of different antigen dose numbers within the Agent.</li> <li>Due - The recommended date for the immunization has been reached.</li> <li>Overdue - The recommended date for this dose has passed.</li> <li>Up to Date - The client is not yet due for the immunization.</li> <li>Bigible - The client has reached or is past the eigbility date, but is not yet due for the immunization.</li> </ul>				ne û	Brand 🌣	EDS: Extra dose LOA: Left over a M: Indicates a m	e safe antigen Intigen hix of different antige	en dose numbers wi	Legen		
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 Jan 01       2018 Jan 01       2018 Feb 01       Overdue         2018 Oct 01       2018 Oct 01       2018 May 01       Due					iie v	Brand V	2010 las 01	2010 las 01	2040 Esh 04	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							2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue		
2018 Jan 01         2018 Jan 01         2018 Feb 01         Overdue           2018 Jan 01         2018 Oct 01         2018 Oct 01         2019 May 01         Due					_		2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue		
2018 Oct 01 2019 May 01 Due					_		2018 Jan 01	2018 Jan 01	2018 Feb 01	Overdue		
							2018 Oct 01	2018 Oct 01	2019 May 01	Due		

# **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.



### 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.

nunizations				Save	Reset	• More
HB	2019 Fe	b 27	2019 Mar 01 (X)			
Zoster	2017 Ju	n 12				
nmunization History - Detailed Data Tab	ble					
Add Immunization				Record	Consent	Apply
Immunization Type: Non-Provider Recorded Include non-inventoried agents * Agent: Varicelia	* Date Administered: 2019/03/12	📰 hh	mm PDT	Age at Adr 2 years	ministration: 2 months	days
Consent Readiness: Missing	* Reason:		•			
Reason for Immunization:	Information Source:					
Provider:     e.g. Provider Last Name, First Name	<b>0</b> Q		Verification Status:			
			Not Requested			
			Completed			
			Consider Deliveres Land	tion		

R2.5.9	R3.2
No filter capability is provided on the Agent list:	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.

nization Handbook

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mmunization Handbook	*This Guide is to be used in conjunction with FNHA Panorama training
Client Immunization Profile	Add Immunization
Double-click in any date field below to enter the default date	Immunization Type: Historical
● View by Agent ○ View by Date	Agent: yyyy/mm/dd
Immunizing Agent	· · · · · · · · · · · · · · · · · · ·
DTaP-IPV-Hib-HB 2019 Feb 21	
HB X 2019 Mar 01	
Varicella	
The de Niene e The Albert	
R2.5.9	R3.2
	The Trade Name field is a type-ahead dropdown list
Display Expired and Recalled Lots	selection, which avoids bad spellings and other junk data,
Trade Name: Engerix-B	and allows Forecaster to define rules based on the Trade
Manufacturer: Glax oSmithKline	Name reliably.
	This applies to adding single/multiple immunizations, as well
	as updating immunization.
	Site: Route:
	·
	Trade Name: Manufacturer:
	Engenx-B
	e
	Engerix-B
	Engerix-B
	Engerix-B Record Consen
	Recombivax HB
	Recombivax HB Dialvsis 40 mcg
	ration A Status V - A Hade warte \$ Body Site
Add Comments	
R2.5.9, the user has to click Add button to add the	R3.2, the user can enter Comments to the text box directly.
entered text to the Comments table:	No need to select Add before applying or saving your work.
	This applies to adding single/multiple immunizations.
	as well as updating immunization
	(4000 characters remaining.)
	resold 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)
- 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.



## 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.

Add Multiple Immunizati	ons		Record Consent	Apply	Without Details	Enter De	tails Reset
nmunization Type: listorical							
Include non-inventoried ag	ents						
Click a table cell to sele	ct or enter a valu	e.					Add 4
Agent		Date 1	Date 2		Date 3		Date 4
		yyyy/mm/dd	yyyy/mm/dd		yyyy/mm/dd		yyyy/mm/dd
	•	yyyy/mm/dd	yyyy/mm/dd		yyyy/mm/dd		yyyy/mm/dd
	•	yyyy/mm/dd	yyyy/mm/dd		yyyy/mm/dd		yyyy/mm/dd
					unan/mm/dd		waa/mm/dd

Enter Immunization Detail for Multiple	
<u>Immunizations</u>	
R2.5.9	R3.2
The details of all immunization records are entered in the single Immunization Detail Add screen.	If the Enter Details button is clicked, the second modal is displayed for entering details of the first immunization is
	presented.

	<ul> <li>to apply this record and move to the next record.</li> <li>2. If the record was entered in error, and the user does want to save it, using the Delete button will remove to current record from the set being entered, and move to the next record.</li> <li>3. The user can also click the Previous button to naviga back to it to make further changes.</li> <li>4. Displayed in the top right corner of the modal, is a counter indicating which record in the set is being worked on.</li> <li>Once all the records from the set have been processed up the Finish button is clicked, the page is refreshed and all to 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.</li> </ul>							
Add Immunization	Next Delete Reset 🔒 🗙							
Immunization Type: Historical	1 of 2 immunizations							
Include non-inventoried agents     Agent:     HB     HB     Estimated Consent Readiness: Missing	Age at Administration: 2 2 2 years months days							
Reason for Immunization: Information Source:								
Provider: e.g. Provider Last Name, First Name	Verification Status:							
	Not Requested     Completed							
Organization: e.g. Organization Display Name	Service Delivery Location: e.g. SDL Display Name							
Vaccine Details	<b>^</b>							
Publicly Funded Lot Number: Display Expired and Recalled Lots	Dosage: Dosage UOM:							
Show All Publicly Funded Non-Publicly Funded	Site: Route:							
	Trade Name: Manufacturer:							
Comments:								
4000 characters remaining.)								
	Next Delete Deset							

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

1. The Agent and Date have been populated. After entering

Immunization Handbook

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

Immunization History - Detailed Data Table						Add Sin	gle Immunization	▼ Add One or More	Immunizations
Up	date	Copy/Replace	View Delete						
	B	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)				
	Ð	НВ	2019 Mar 13	2y 2m					
		HB	2019 Feb 27	2y 1m	Valid				
$\bigcirc$		НВ	2019 Mar 01	2y 2m	Invalid				
	Ð	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: Name(First,Middle,Last)/Gender: 2643705 Wai Test Ng / Male			Health Card No: 9856000004					
Phone Number: -(-)	Phone Number: Juris diction Info: -(-) Richmond - HSDA,Richmond - Branch			Additional ID Type / Additional ID: Yukon HCIP# / -				
mmunization Detail								
Immunizing Agent:	DTaP-IPV-Hib-HB		Status:	Valid				
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							
listorical:	Yes							
nformation Source:								
_ot Number:								
Irade Name:								
Manufacturer:								
Publicly Funded:	NO							
Dose Number:	1		D					
Dosage:			Dosage UOM:	NA				
Site:			Route:					
Reason for Immunization	on:		Provider:					
kevised Dose Number:			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										
Up	date	Copy/Replace	View	Delete						
	B	Agent 🔺	Date Adm	inistered	Age at Administration 🗘					
0		DTaP-IPV- Hib-HB	2019 Mar 1	14	2y 2m					
$\bigcirc$		НВ	2019 Mar 1	13	2y 2m					

mmunizatio	n History - De	tailed Data Table								-	*	
View Immu	nization							Apply	Reset	B	×	
Status Det	ails								~	*		
	Agent		Dose Nur	mber		Revised Dose #		Status		<u>`</u>		
0	DTaP-I	PV-Hib-HB						Invalid				
je je	Antigen		D	ose Number			Status					
	Diphtheria-D	Diphtheria-D 1 HB Hib 1					Valid					
	HB						Invalid					
	Hib						Valid					
	Pertussis 1				Valid							
	Polio		1				Valid					
	Tetanus		1				Valid					
Immunizat	ion Details								~	*		
* Vaccine	Details	-							~	8		
Comment	and Status Up	dates								8		
									Annh	Ret	sot	
ernal Id	<u>entifiers</u>											
					Tŀ	IIS Applies to Immunization Def Historical  N Date Administered 2017/06/12 Reason for Immuniz Routine Vaccine Provider: Davidson, Reuben Organization: Richmond - Branch External ID Type: FHA PARS Immuni	both Vie tails on-Provider Reco to t5:15 GMT ation:	ew and Up orded Provided	edate I Recorded Age at A years Informati	dministrat 5 month ion Source	ion: 11 hs days v: Verificati © Req Noti Com * Service Richmo External 1234567	on Status uested Requeste pleted Delivery nd, Richn ID: 890
						* Vaccine Details	LOUGH ID				1204067	550
date Im	munizatio	<u>n</u>										
2.5.9 The Override Status and Revise Dose Number Inctions are available at the earlier stage of Add Inmunization via the Immunization Detail Add Ireen, even before the record is saved, and they In only apply at the Agent level, but not the Antigen					<ul> <li>R3.2</li> <li>After saving the immunization, additional functions are available by clicking the Update button:</li> <li>1. Override the status via the Override Status button, and revert to the forecaster validation via the Rese Status button, are available at both the Agent level</li> </ul>							

#### They are also available after the record is saved via the Immunization Detail Update screen. Add Immunization Immunizing Agent 1: Varicella Set By Forecaste Override to Valid Override to Invalid 2019 03 14 💷 Previous Consent Obtained Date Administered ~ \* Route: Subcutaneous Site: --select-× Reason for I -selec Revised Dose Number Revised Dose Reason: Revis ed Dose Comments (4000 characters) Add Information Sheet Given Date: 2019 03 14 vvvv mm dd **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. Delete Immunization ?≞ Health Card No: Client ID Name(First,Middle,Last)/Ge WaiTest Ng / Male Date of Birth / Age: 2017 Jan 1 / 2 vrs 2 m Phone Nu Juris diction Info: Richmond - HSDA, Richmond - Bran Additional ID Type / Additio Yukon HCR# / -Immunization Detail Immunizing Agent: Date Administered: Historical: DTaP-IPV-Hib-HB 2019 Mar 13 Historical: Manufacturer: Lot Number: Publicly Supplied GlaxoSmithKline A21CD285A-CC01 Exp. 2020/08/31 Y Generic Physician Arm - Left Intramuscular 2019 Mar 13 Immunizer: Anatomical Site: Anatomical Route: Date Immunization Information Sheet Given: Date Comments Recorded By 2019 Mar Revised dose number w as entered or changed Ng CSTSUP, Wai 2019 Mar test Ng CSTSUP, was Ng CSTSUF 2019 Mar All dose revisions for this immunization were reversed. The last revised dose number w as 1, the last revised dose reas 14 TMHO Recommendation' and the last status w as Valid (override) If you wish to delete this immunization, select 'Reason' and click Delete. If you do not want to delete this immunization. Click 'Cancel'. uplicate as a re intered in error Other Recorded By Ng CSTSUP, Wai Ng CSTSUP, Wai Ng CSTSUP, was 1, the last revised dose reason was Wai want to Duplicate as a result of Client Merge Entered in error Other Delete Lancel

#### \*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.

nmuniza	tion History - D	etailed Data Tab	ole			<ul> <li>Add Single</li> </ul>
Update	Copy/Replace	View Del	lete			
B	Agent +	Date Administer	red Age at Administr	ation 🗘	Status O	Revised Dose ©
•	DTaP-IPV- Hib-HB	2019 Mar 14	2y 2m		Invalid	
	HB	2019 Mar 13	2y 2m		Valid	
-						
Overr	ide Status Ro	eset Status Re	evise Dose Numl	ber Re	set Dose Number	
6	Agent		Dose	Number	set boss munics	Revised Dose
•	) S Agent DTaP	IPV-Hib-HB	Dose	Number		Revised Dose
Ove	Agent	t IPV-Hib-HB Reset Status	Dose	Number		Revised Dose
Ove	Agent DTaP- mride Status Antigen	t IPV-Hib-HB Reset Status	Dose	Number Dose Nu	mber	Revised Dose
	Agent DTaP	t IPV-Hib-HB Reset Status	Dose	Number Dose Nu 1	mber	Revised Dose
	Agent DTaP2 Antigen Diphtheria- HB	t IPV-Hib-HB Reset Status	Dose	Number Dose Nu 1	mber	Revised Dose
	Agent DTaP- mride Status Antigen Diphtheria- HB Hib	t IPV-Hib-HB Reset Status	Dose	Number Dose Nu 1	mber	Revised Dose
	S         Agen           DTEP         DTEP           mride Status         Image: Comparison of the status           S         Antigen           Diphtheria-Image: Comparison of the status         Image: Comparison of the status           HB         Hib           Pertussis         Pertussis	t IPV-Hib-HB Reset Status	Dose	Number Dose Nu 1	mber	Revised Dose
	S         Agent           Draft         Draft           mride Status         Draft           S         Antigen           Diphtheria-I         Diphtheria-I           HB         Hib           Pertussis         Polio	t JPV-Hib-HB Reset Status	Dose	Dose Nu 1 1 1 1	mber	Revised Dose

# 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.



# 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.

Immunization History - Detailed Data Table   Add Single Immunization  Add One or More Immunizations									
Upd	ate	Do Not Use	View Delete						
	B	Agent 🔺	Date Administered 🗘	Age at Administration 🗘	Status 🗘	Revised Dose 🗘	Trade Name 🗘	Body Site 🗘	Volume 🗘
$\bigcirc$		HB	2019 Mar 26	2y 2m	Valid (override)	2			

# 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:	<ul> <li>R3.2</li> <li>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: <ul> <li>RBCY_IMM001-Adverse Event Following Immunization (AEFI) Individual Client Record (Filters available)</li> <li>RBCY_IMM024-Client Immunization Documentation-By Service Date (Filters available)</li> <li>RBCY_IMM025-Client Immunization Record (Filters available)</li> </ul> </li></ul>
X 2019 Mar 01	available)  Immunizations  Save Reset
2019 Feb 02	Add to WQ     Launch Report     Name(Last, First Middle) / Gender:     Health Card No:     Launch Report     2637869     Ng, Wai Test / Male     Additional ID Type / Additional ID:     Yukon HCIP# / -
	Immunization Details Immunization History - Summary Grid Agent Administe Date Administe Date Administe
hstorcal immunization. ion has been overridden. nune ation has been revised. did not meet local schedule. Add Adm inistered Add Historical Details Special Considerations Adverse Events Deferrais Consent Allergies imm s Record Report Clear	Immunizations       Save       Reset         Launch Report       *       Report:       RBCY_IMM001-Adverse Event Following I *         RBCY_IMM001-Adverse Event Following Inmunization (AEFI) (ndividual Client Record)       RBCY_IMM025-Client Inmunization Record       RBCY_IMM048-Family Immunization Report

# Forecaster

Immunization Forecast by A	gent/Antigen		
R2.5.9	F	R3.2	
This section is titled Immu	nization Forecast (by	• This se	ction has been renamed to Immunization
Agent)		Foreca	st by Agent/Antigen to better reflect the fact
Leftover antigens are brok	en out separately into	that it o	displays the forecast for antigens that have
rows at the bottom of the	table	been re	olled up to agents, and also for leftover
• Legend keys for special tak	ole values appears	antiger	ns (those that could not be rolled up)
plainly below the table		Leftove	er antigens (LOA) are no longer separated out,
		but ap	pear in the table according to sorting order
		rules	
		0	LOA is indicated in the More Info column
		• Table o	olumns are now sortable
		• 'Eligible	e' and 'Due' columns have been reordered
		with re	spect to each other
		0	' 'Eligible' now appears to the left of 'Due'
		New Co	olumns:
		More Info' colu	mn
			<ul> <li>shows LOA for rows that are leftover</li> </ul>
			antigen forecasts
			<ul> <li>shows EDS when the row forecasts</li> </ul>
			an agent that contains one or more
			extra dose safe antigens
		0	'Overdue Date' column
			<ul> <li>Shows the date that the Forecaster</li> </ul>
			calculated as when the child
			becomes overdue for the forecasted
			agent/antigen
			<ul> <li>Placed to the right of 'Due' column</li> </ul>
		• Renam	ed columns: generally behave the same as in
		R2.5, b	ut just have new column headers for clarity of
		purpos	se la
		0	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
		0	Renamed 'Dose' to 'Forecasted Dose #'
			makes clear that this is the dose number that
			will be forecasted as the next dose
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mmunization Handbook					*This Guide is to be used in conjunction with FNHA Panorama training				
					<ul> <li>Renamed 'Status' to 'Forecast Status'</li> </ul>				
					<ul> <li>Lege</li> </ul>	nd keys	are now ac	cessed via 'H	lover Help' by
					hovering the mouse over the 'Legend' link				
					<ul> <li>Only shows keys for 'M', 'FDS' and 'LOA'</li> </ul>				
					-	There	are no sta	itus kevs anv	more
					° here is no '*	' key (for	evtra dose	safe antige	ns) anymore
Forecaster by Agen	t/Antigen ir	259							ns) anymore
	t (by Agent)	12.3.3.		Containa D	lata	¢Н	de Immunization F	Forecast (by Agent)	1
Last forceast ran on 2018 Oct 20. (Only available for elights who have forceasted agents or astigged)									
Last forecast rail on: 2016	OCL20 [Uniy av	allable for clief	nts who have to	recasted a	gents of antigensj	Reffesti	rorecast		
Forecast status as of date	2018 Oct 31								
Immunizing Agent		Dose	Volume	Brar	Due	EI	Igible	Status	
mmk		1			2004 Feb 0	- 20	04 Feb 00	Overdue	
Polio		1			2010 Feb 0	6 20	10 Feb 06	Overdue	
Varicella		1			2016 Feb 0	6 20	16 Feb 06	Overdue	
НВ		1	.5 mL		2018 Aug 0	7 20	18 Aug 07	Overdue	
Leftover Forecasted Ant	igen	Dose	Volume	Brar	nd Due	EI	igible	Status	
Diphtheria-d		1			2010 Feb 0	6 20	10 Feb 06	Overdue	
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.									
Immunization Forecast by	Agent/Antigen							✓ 🛕	
Last Forecast Pan On: 2018 Oct	24							Legend	
Energiast Status calculated as of	2018 Oct 31						P	Legenu	
Immunizing Agent/Antigen	Forecasted	More Info	Volume \$	Brand \$	Eligible \$	Due 🔺	Overdue \$	Forecast	
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	
НВ	1		0.5 mL		2018 Aug 07	2018 Aug 07	2018 Sep 07	Overdue	
Immunization For	ecast by D	isease							]
R2.5.9				F	3.2				
This section	is titled 'Im	nmunizat	ion Foreca	ast	This s	ection h	as been rei	named to 'Im	nmunization
(by Disease	)				Forec	ast by D	isease'		
<ul> <li>Legend key</li> </ul>	s for specia	l table va	lues anne	ars		is no lo	and for th	is section	
nlainly helo	w the table						nd Overdu		oordod with
						et te	h athan		
					respe	ct to eac	n other in	order to be o	Consistent with
					Immunization Forecast by Agent/Antigen section				

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

- 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 #' 0 makes clear that this is the dose number that will be forecasted as the next dose
  - Renamed 'Status' to 'Forecast Status' 0

#### Forecaster by Disease in 2.5.9:

Immunization Handbook

Immunization Forecast (by Disease) Hide Immunization Forecast (by Disease) Contains Data 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 Group 🔻						
Disease	Antigen	Dose	Overdue	Due	Eligible	Status
Diphtheria	Diphtheria-d	1	2011 Apr 18	2011 Mar 18	2011 Mar 18	Overdue
Hepatitis B	нв	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
letanus	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:

Last Forecast Ran On: 2019 Mar 19						
orecast Status calculated as of: 2019 Mar 21 Refresh Forecast						
ilter by Disease Group: Vaccine Preventable Diseas	e 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.

Add/Update Special Consideration Organization

# **Special Considerations**

Ways to Enter:	
R2.5.	R3.2
Special Considerations are entered by selecting an <b>Agent</b> (which in turn brought forward the associated <b>Antigens</b> ):	<ol> <li>There are 5 different ways to enter a Special Consideration:</li> <li>Selecting an individual Antigen</li> <li>Selecting an Agent</li> <li>Selecting an Agent Group</li> </ol>

- 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.

d/Update Special Cons	deration	HideAdd/Update Special Consideration	Special Considerations
<ul> <li>Organization</li> </ul>	Panorama		
o specify an Organization first cl ind click on Select button. Then	ick on the 'Find' button. Then search, or type the nam e of the Organization you with Lizk 'Close' to close.	to specify, select it Clear	Add Special Consideration
Organization: Top Level > Lev	el 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]	Find Q	
* Service Delivery Location	Administrator SDL	SDL ID 1	Organization:
To specify a Service Delivery Loca wish to specify, select it and click o	tion first click on the 'Find' button. Then search, or type the name of the Service Delt m 'Select' button. Then click 'Close' to close.	Clear	Puncan, Duncan, British Columbia
Service Delivery Location: T	op Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 3 L	ocation] Find Q	* Type of Special Consideration:
* Type of Special Consideration:	Contraindication V		Contraindication
* Reason for Special Consideration:	select	$\checkmark$	* Special Consideration Applies to:
* Enter Reason if "Other (specify)":			Antigen
Immunizing Agent:	select	Add	
Agent	Antigens		Agent
UTaH4PV-Hb-HB	☑ Diphthoria-D		
	V Hb		Agent Group
	Pertussis		
	✓ Polio		Disease
	✓ Tetanus		Disease
Effective Dates: * From:	2019 03 18 🖬 10:		Disease Group
			* Effective From: To:
			2019/03/18 🔛 yyyy/mm/dd 🔛
			Agent Group:
			There are 6 Agent Groups available for selection to
			There are o <b>Agent Groups</b> available for selection to
			Special Consideration:
			<ul> <li>[1] 2-4-6 months childhood immunizations</li> </ul>
			<ul> <li>[2] 12-18 months childhood immunizations</li> </ul>

- [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.

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

Add Special Co	nsideration					
Organization:			* Service D	elivery Location		
Panorama, British	Columbia	<b>0</b> Q	Administra	ator SDL, British		
Type of Special Co	onsideration:		* Reason fo	or Special Consi		
Contraindication		-				
Special Considera	tion Applies to:					
Antigen	· · · · · · · · · · · · · · · · · · ·	Selected Agent grou	up includes:			
Agent	*	DTaP-IPV-Hib DTaP-IPV-Hib-HB HA				
Agent Group	· ·	HB Influenza				
Disease	٩	luenza-Inacti -C-C umo-C-13	ivated			
		avirus				
Disease Giou	[1] 2-4-6 months childhood immunization	s				
	[2] 12-18 months childhood immunization	IS				
Effective From:	[3] 4-6 years childhood immunizations					
2019/03/18	[4] Grade 6 childhood immunizations					
Source of Evidence	[5] Grade 9 childhood immunizations	mented:				
Client/Parent/Gua	[6] All Vaccine Preventable Disease Vac	ines dd 🔳				

### **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.

	Selected Disease group includes:
	EXECUTION OF A DESCRIPTION OF A DESCR
	Hepatitis A
	Hepatitis B
Antigen	Human papillomavirus infection
	Influenza
Agent	Measles
Agent Group	Meningococcal disease (invasive)
	Mumps
Disease	Pertussis
	Pneumococcal disease (invasive)
	Poliomyelitis
٩	totavirus
	tubella
Vaccine Preventable Disease Disease	Group
	faricella
* Effective From: To:	
2019/03/18 yyyy/mm/dd	

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 <b>Effective To Date</b> is inclusive, that means the Special Consideration is still effective on the <b>Effective To Date</b> . (The <b>Effective From Date</b> 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 <b>Antigen</b> level:	R3.2, the Special Consideration records are saved and displayed as below:
	<ol> <li><u>Selecting an individual Antigen</u> 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.</li> <li><u>Selecting an Agent</u> 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.</li> <li><u>Selecting an Agent Group</u> allows the user to select once, but generate multiple records using the same details - so one record per Agent in the Anent Group is saved for the client (the record looks no different than if it had been entered as a single Agent).</li> <li><u>Selecting a Disease</u> allows the user to select once, but generate multiple records using the same details - so one record per Agent in the Special Consideration for just one Disease, the saved record will be for the single Disease selected.</li> <li><u>Selecting a Disease Group</u> 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).</li> </ol>
Special Consideration	Special Considerations
Antigen         Type         SpecialConsideration         Effective From           Dphtheria-D         EXEMPTION         Cient Refusal         2019 Mar 18	
HB EXEMPTION Client Refusal 2019 Mar 18	Update View Delete

Antigen	Туре	Special Consideration	Effective From
Diphtheria-D	EXEMPTION	Client Refusal	2019 Mar 18
HB	EXEMPTION	Client Refusal	2019 Mar 18
Hib	EXEMPTION	Client Refusal	2019 Mar 18
Pertussis	EXEMPTION	<u>Client Refusal</u>	2019 Mar 18
Polio	EXEMPTION	Client Refusal	2019 Mar 18
Tetanus	EXEMPTION	Client Refusal	2019 Mar 18

Up	date	View Delete			
		Туре +	Applies To +	Antigen/Agent/Dise	Reason 0
•		Contraindication	Antigen	НВ	Family history of congenital immunodeficiency
		Exemption	Agent	HPV-9	Client Refusal
		Exemption	Agent	Varicella	Client Refusal
0		Exemption	Disease	Hepatitis A	Parental/Guardian Refusal
		Exemption	Disease	Influenza	Parental/Guardian Refusal

# Deferrals

Viewing Deferrals	
R2.5.9 The Deferrals are displayed in the Deferrals section on the Client Immunization View/Add screen:	R3.2 The Deferrals are still displayed in the <i>Immunization Profile</i> screen, but are now as part of the <i>Tab Panel</i> section of important information:
Client Immunization View/Add	Immunizations
Client ID:         Name(First,Middle,Last)/Gender:         Health Card No:           2643705         Wai Test Ng / Male         985600004           Phone Number:         Jurisdiction Info:         Additional ID Type / Additional Yukon HSDA,Rehmond - Branch	Self-ID Missing     Client ID:     C637869     Self-ID Missing     Name(Last, First Middle) / Gender:     Health Card No:     9856000004     Phone Number:     Address:     Address:     Additional ID Type /     Yukon HCIP# / -
Wait Queue	Immunization Details
Client Immunization Profile	Immunization History - Detailed Data Table
Antigen Count   Contains Data	IdD Faller
Immunization Forecast (by Agent) <ul> <li>Contains Data</li> </ul>	Special considerations     Acri     Anergies     Anergies     Anergies     Anergies     Anergies     Anergies
Immunization Forecast (by Disease) 🗸 Contains Data	Type A Applies To A Applies To A Reason \$
Deferrals 🗸 Contains Data	Total: 1
Immunizing Agent Reason Effective Fr	
	Antigen Count
Invalid/Uncounted Immunizations	
Deferrals button under the <i>Immunization Profile</i> section of the <i>Client Immunization View/Add</i> screen:	RS.2, the Deferrals are added of updated via the Left Hand         Navigation (LHN) > Deferrals under the Immunization Profile         section of the Client Immunization View/Add screen:         :: Immunization         Deferrals
2019 Feb 21	Self-ID Missing  Client ID:
	Recent Work     Phone Number:
	Cohort  Deferrals
	Immunizations        Immunization Profile
	Special Considerations Update Dele
historical immunization.	Deferrals HB
unization has been revised. Iid not meet local schedule.	Mass Immunization Events TB Skin Test Summary Total: 1
Add Administered Add Historical Details	
Consent Allergies Immis Record Report Clear	R3.2, Deferrals contain Comments field:
	Deferrals Add Deferrals Apply
	* Immunizing Agent:
	* Effective From: To: yyyyimmidd I yyyyimmidd III
	Comments:
	(2000 characters remaining.)
Warning for Recorded Immunization	

Immunization Handbook	*This Guide is to be used in conjunction with FNHA Panorama training
R2.5.9, no Warning is displayed for active Deferral	R3.2
upon recorded Immunization:	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.
	Save Reset 💌 More 🗉 🗔 🚔 ? 🔽
	Active
	Card No:     Date of Birth / Age:       0000004     2017 Jan 01 / 2 years 2 months
	tional ID Type / Additional ID: n HCIP# / - You have created an immunization record for HB administered on 2019 Mar 01 for which an active deferral exists.
	Date Administe Date
	2019 Mar 01 (X)