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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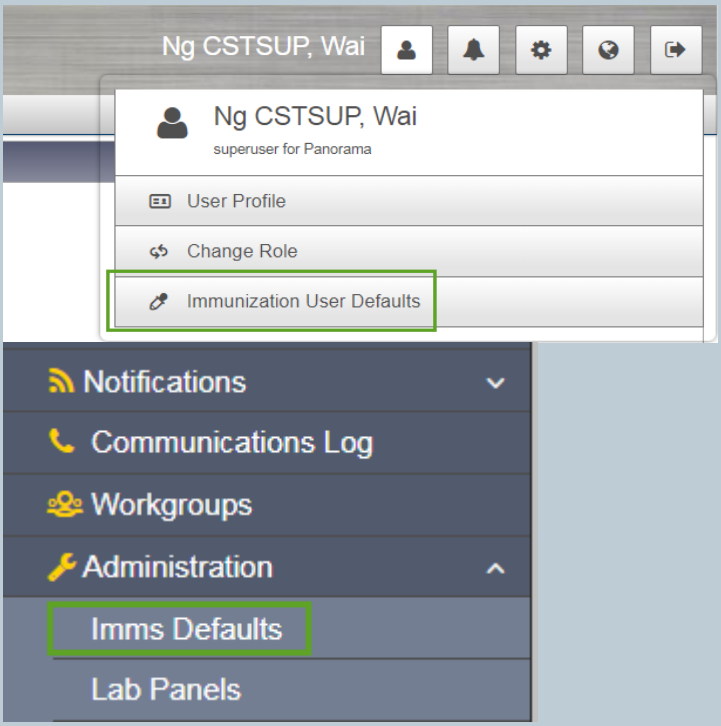
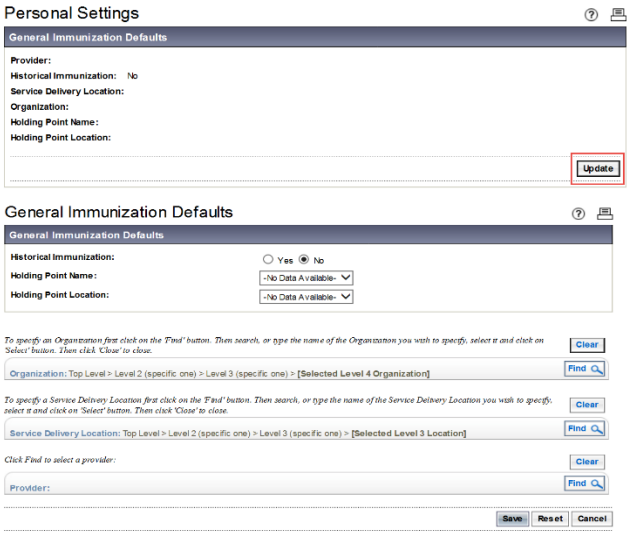
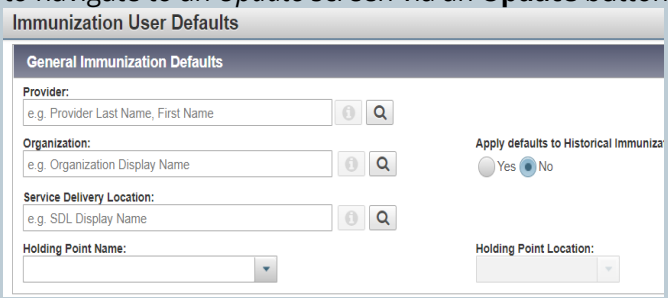
Please Note:

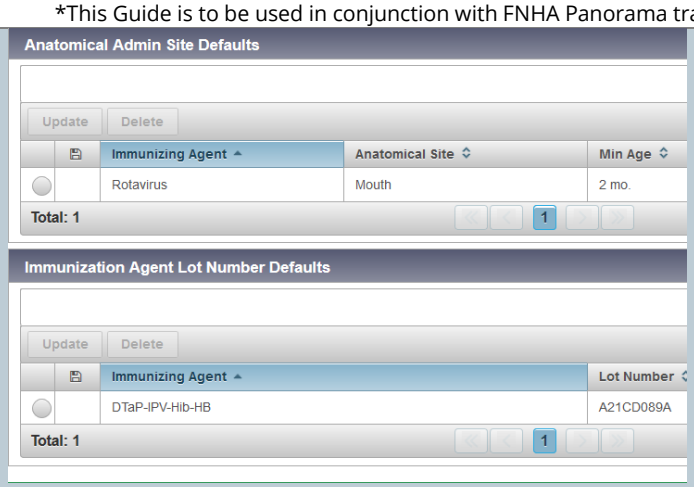
It is required for CHNs working in FN communities with Panorama access to have training with the FNHA Panorama team prior to use of the Panorama system. Panorama guides are to be used in conjunction with formal Panorama training. To arrange a training session, please contact **panorama@fnha.ca**

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.

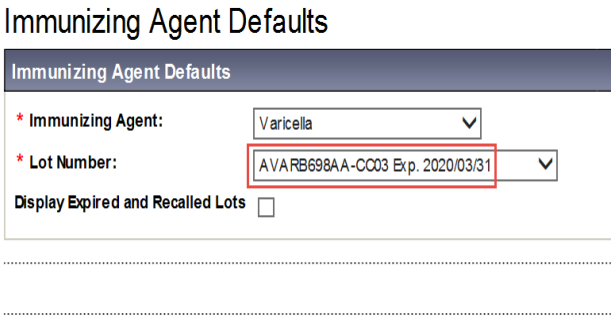
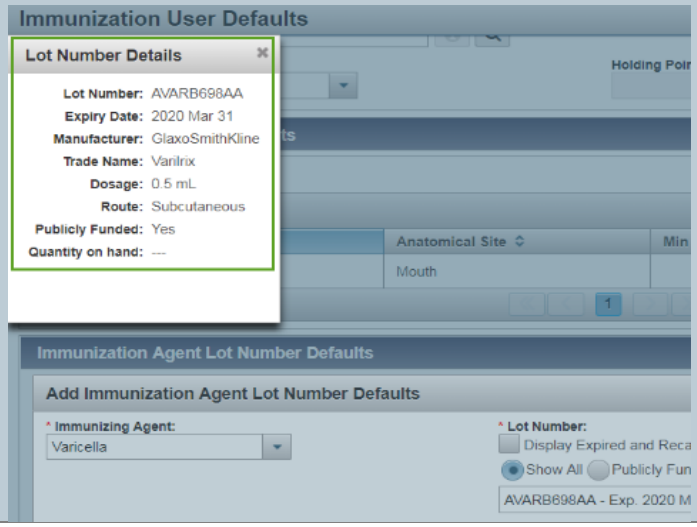
The changes noted in this handbook are not complete and only show the basic 3.2 Immunization module upgrades that most CHNs will likely use.

Immunization User Defaults

R.2.5.9	R3.2
Immunizations User Defaults are accessed via My account > Immunizations Defaults menu in the banner:	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	R3.2
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: 	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:

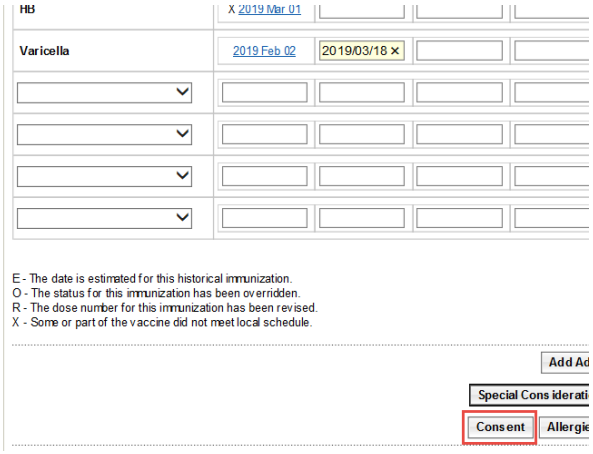
R2.5.9	R3.2
the selected **Lot Number** information is limited to the value displayed on the dropdown list: 	the user can further verify the *Lot Number Details* via the **Information** ( ) button to verify the details of the lot selected: 

Consent

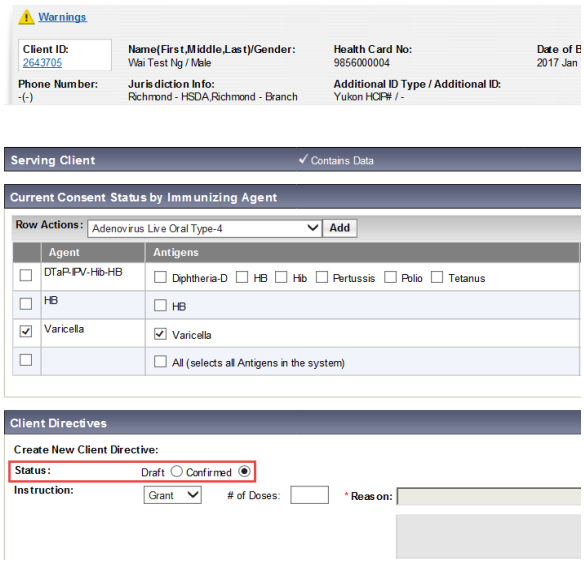
Recording Consent

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".



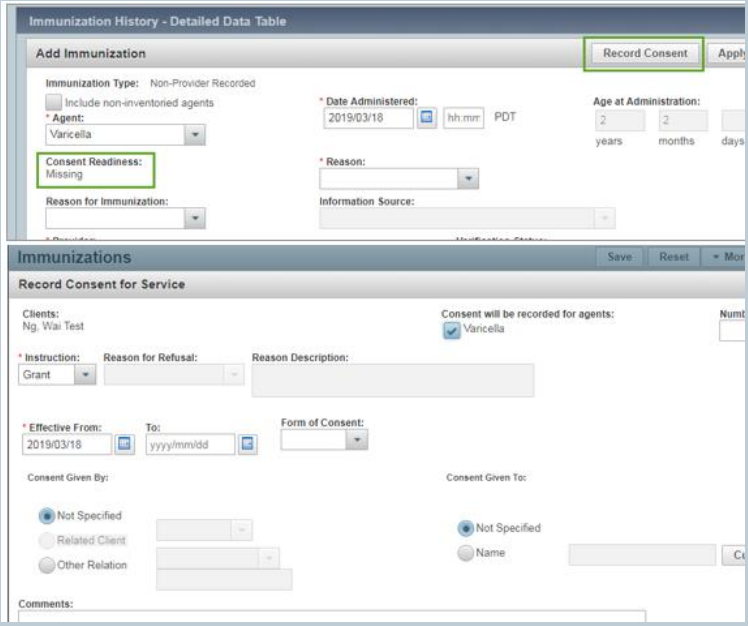
Maintain Consent for Immunizations



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.



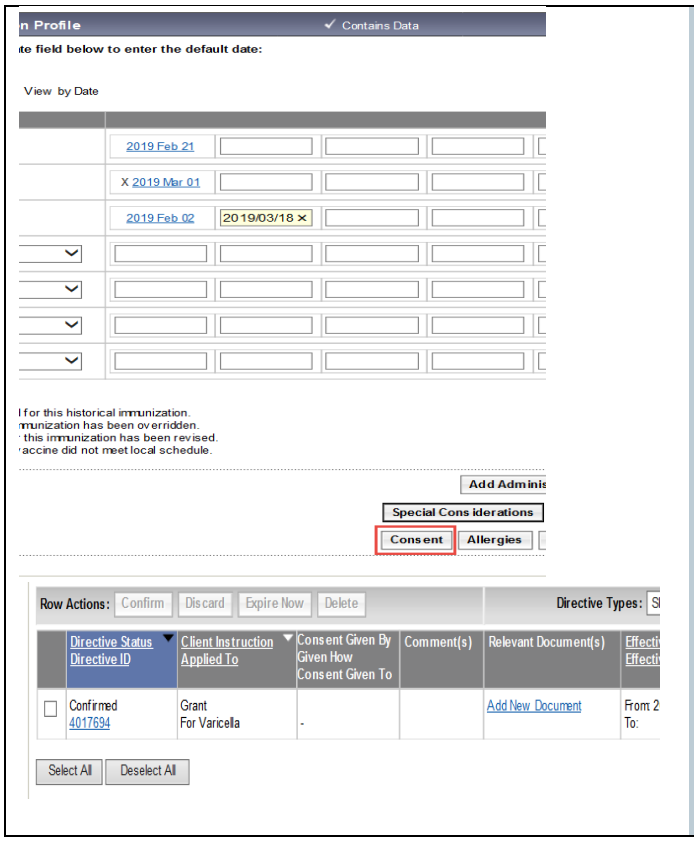
Viewing Consents

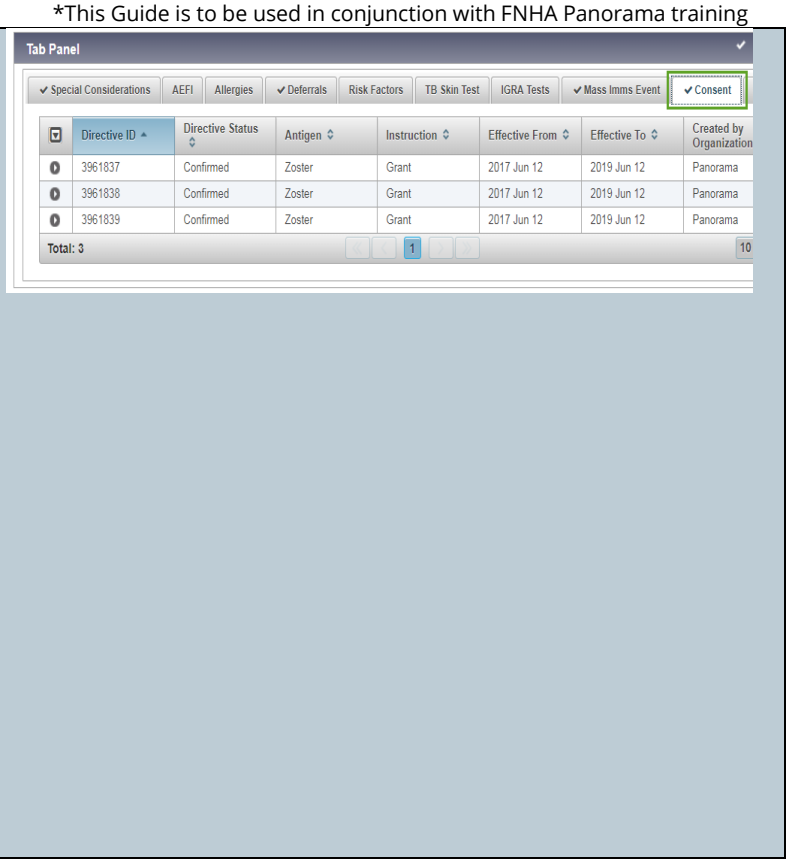
R2.5.9

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,

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


n Profile
Contains Data
te field below to enter the default date:
View by Date
2019 Feb 21
X 2019 Mar 01
2019 Feb 02
2019/03/18
l for this historical immunization.
mmunization has been overridden.
this immunization has been revised.
vaccine did not meet local schedule.
Add Adminis
Special Considerations
Consent
Allergies
Row Actions:
Confirm
Discard
Expire Now
Delete
Directive Types:
Directive Status
Directive ID
Client Instruction
Applied To
Consent Given By
Given How
Consent Given To
Comment(s)
Relevant Document(s)
Confirmed
4017694
Grant
For Varicella
-
Add New Document
From 2
To:
Select All
Deselect All


Tab Panel
Special Considerations
AEFI
Allergies
Deferrals
Risk Factors
TB Skin Test
IGRA Tests
Mass Imms Event
Consent
Directive ID
Directive Status
Antigen
Instruction
Effective From
Effective To
Created by Organization
3961837 Confirmed Zoster Grant 2017 Jun 12 2019 Jun 12 Panorama
3961838 Confirmed Zoster Grant 2017 Jun 12 2019 Jun 12 Panorama
3961839 Confirmed Zoster Grant 2017 Jun 12 2019 Jun 12 Panorama
Total: 3
1

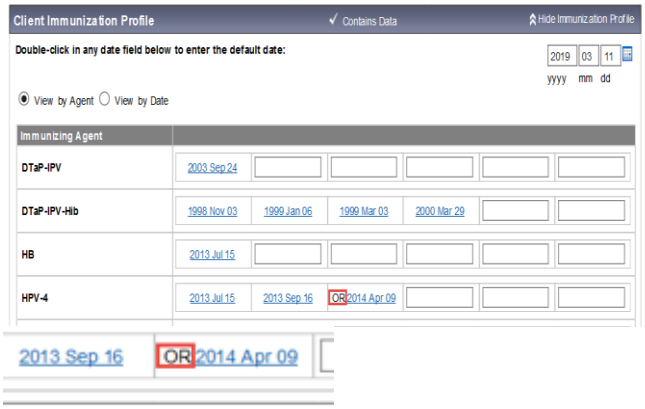
Immunization Profile

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



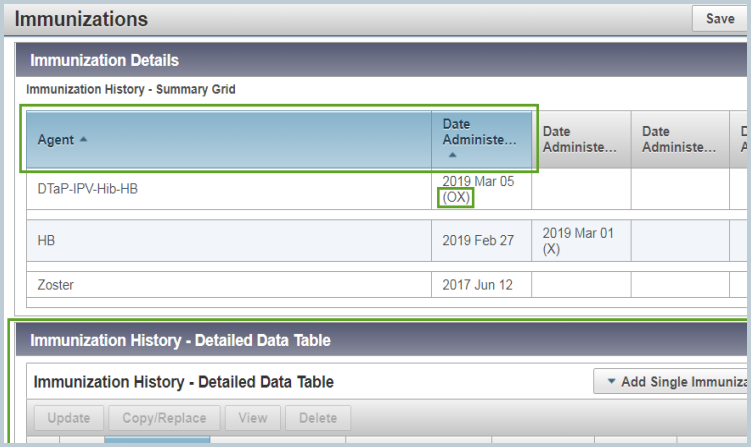
R3.2

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

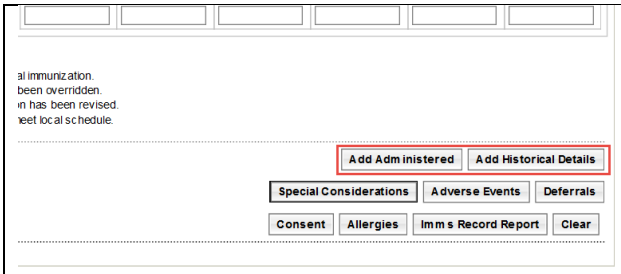
R2.5.9

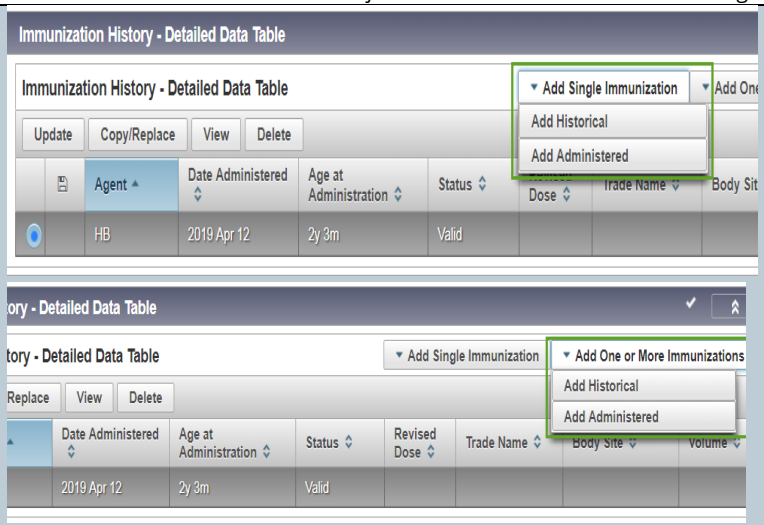
The buttons for adding an immunization are all displayed below the Summary Grid:

R3.2

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

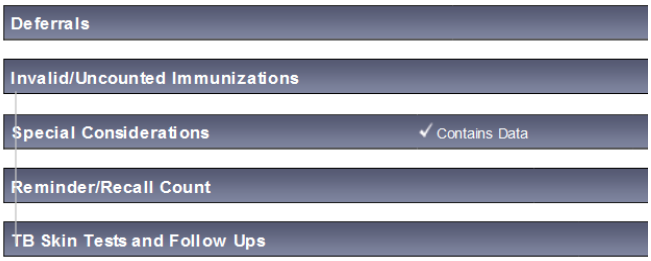
- One for adding a single immunization record, and
- Another for adding multiple records





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,

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 antige

Forecast status as of date: 2019 Mar 11

Immunizing Agent	Dose	Volume	Brand	Due
HPV-9	3			2018 Jul 0

* - 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.

hence removing clutter from the page and reducing vertical scrolling:

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

Brand				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

Adding Immunizations

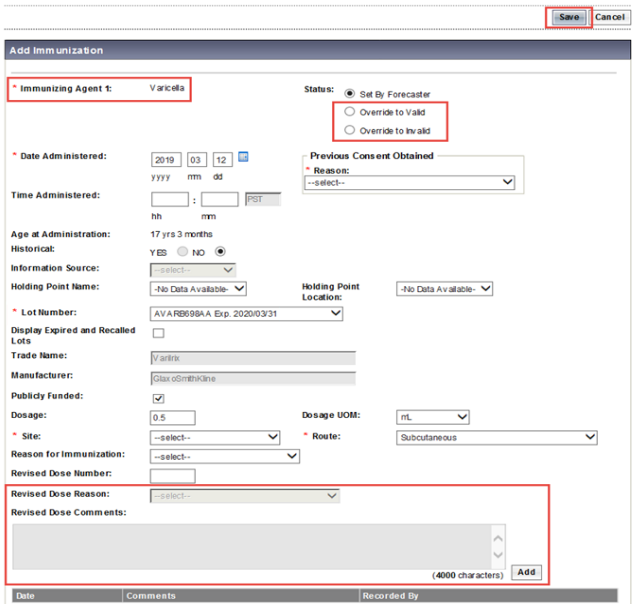
Add Single Immunization:

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.



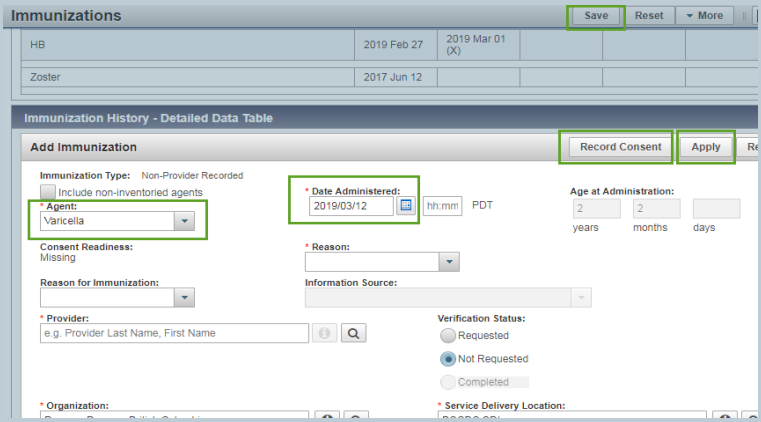
R3.2

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.



Inventoried Agents Filter:

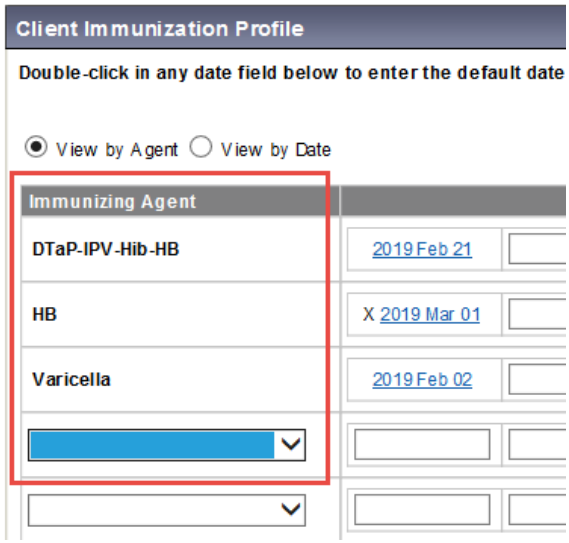
R2.5.9

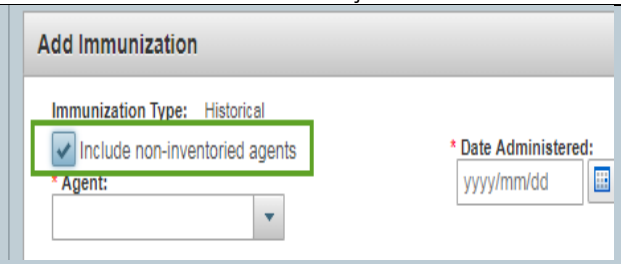
No filter capability is provided on the Agent list:

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.

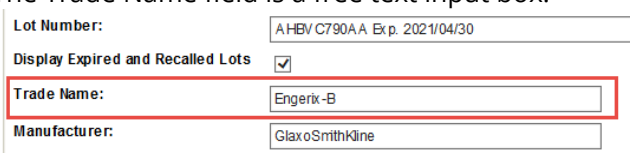




Trade Name Type-Ahead

R2.5.9

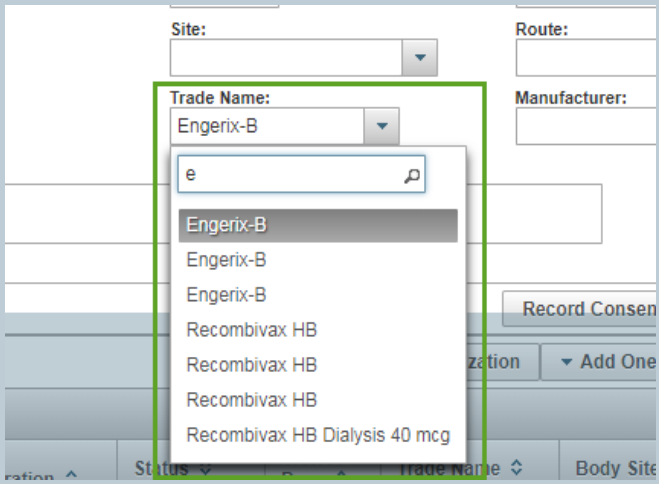
The Trade Name field is a free text input box:



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.

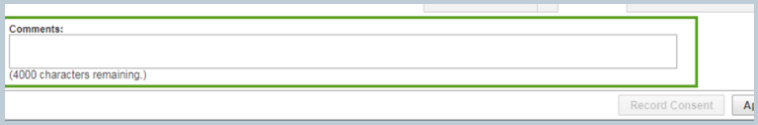


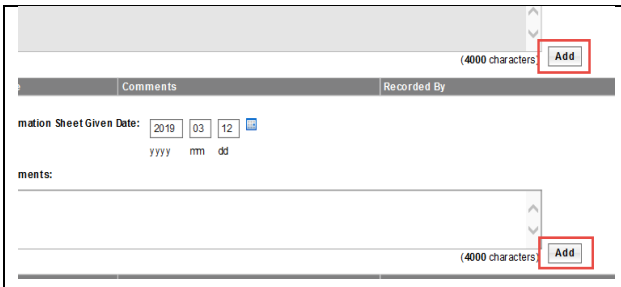
Add Comments

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. No need to select Add before applying or saving your work.

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





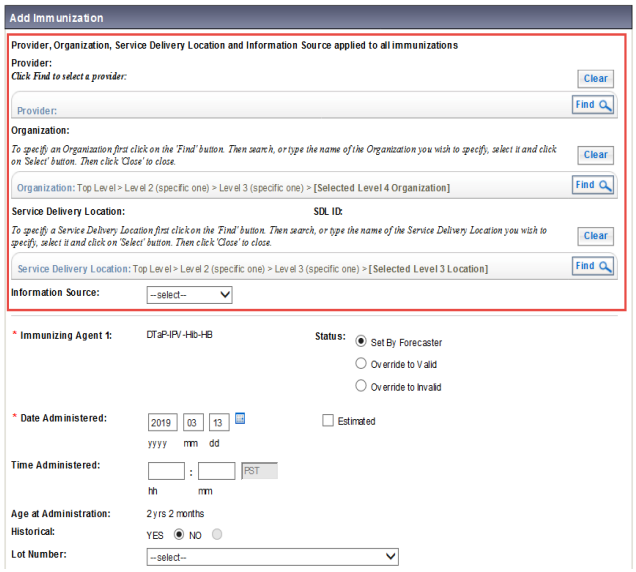
Add Multiple Immunizations

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.



R3.2

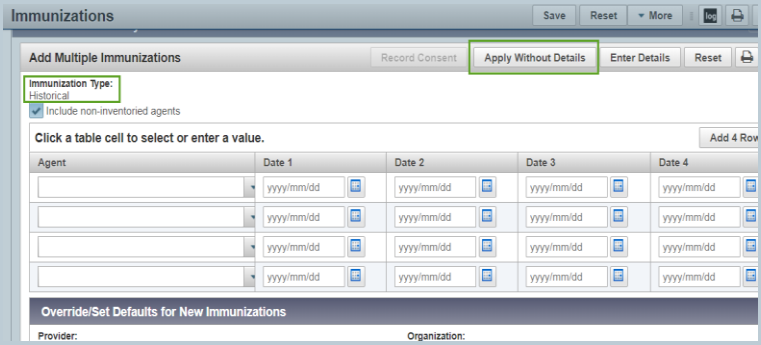
Adding multiple immunizations is now done through an Add Multiple Immunizations modal that steps the user through the process.

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.



Enter Immunization Detail for Multiple Immunizations

R2.5.9

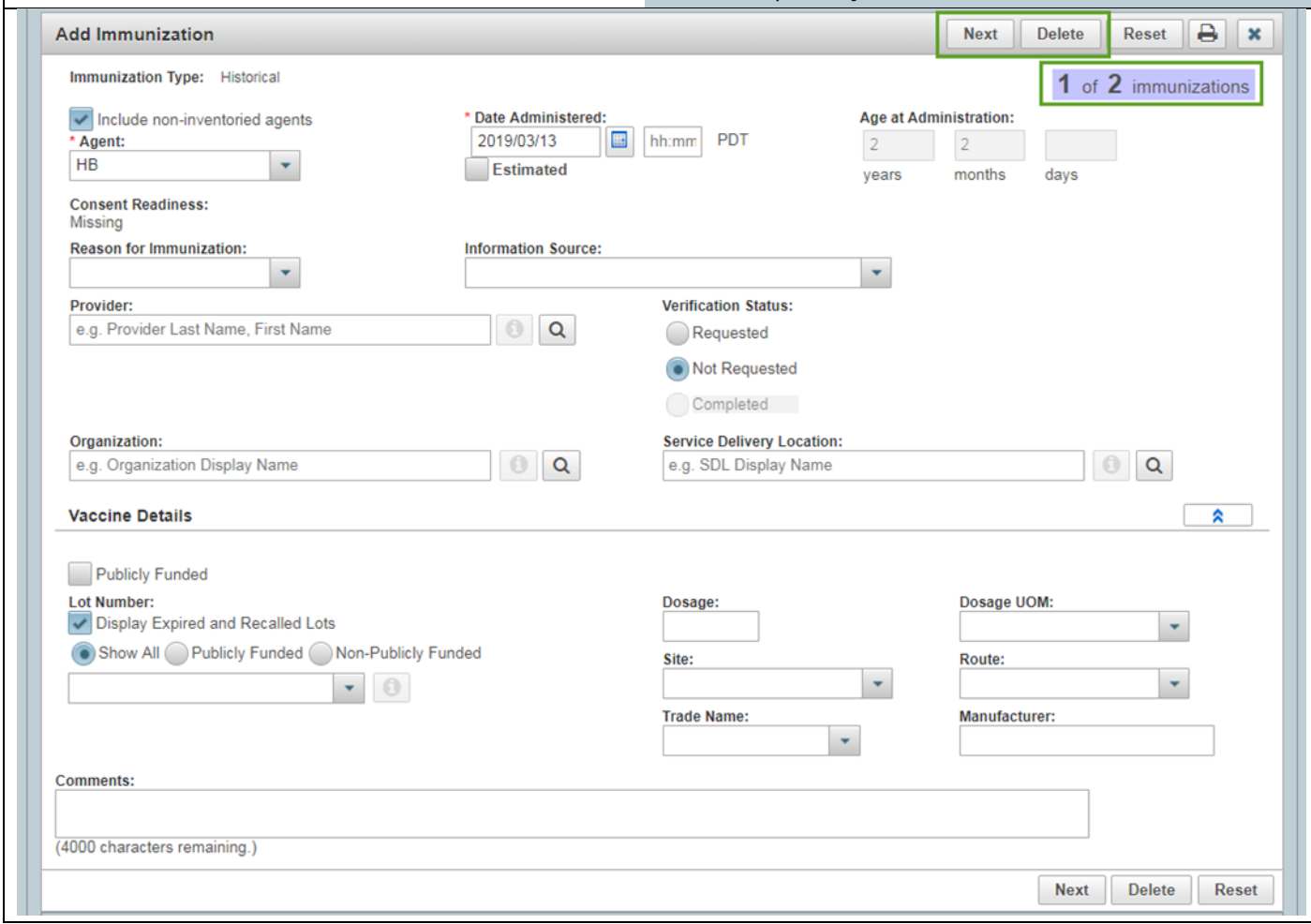
The details of all immunization records are entered in the single Immunization Detail Add screen.

R3.2

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.



Immunization History - Detailed Data Table

Immunization History - Detailed Data Table | Add Single Immunization | Add One or More Immunizations

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: 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 / Additional ID: Yukon HCIP# / -

Immunization 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
Historical: Yes
Information Source:
Lot Number:
Trade Name:
Manufacturer:
Publicly Funded: No
Dose Number: 1
Dosage: | Dosage UOM: NA
Site: | Route:
Reason for Immunization: | Provider:
Revised 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.

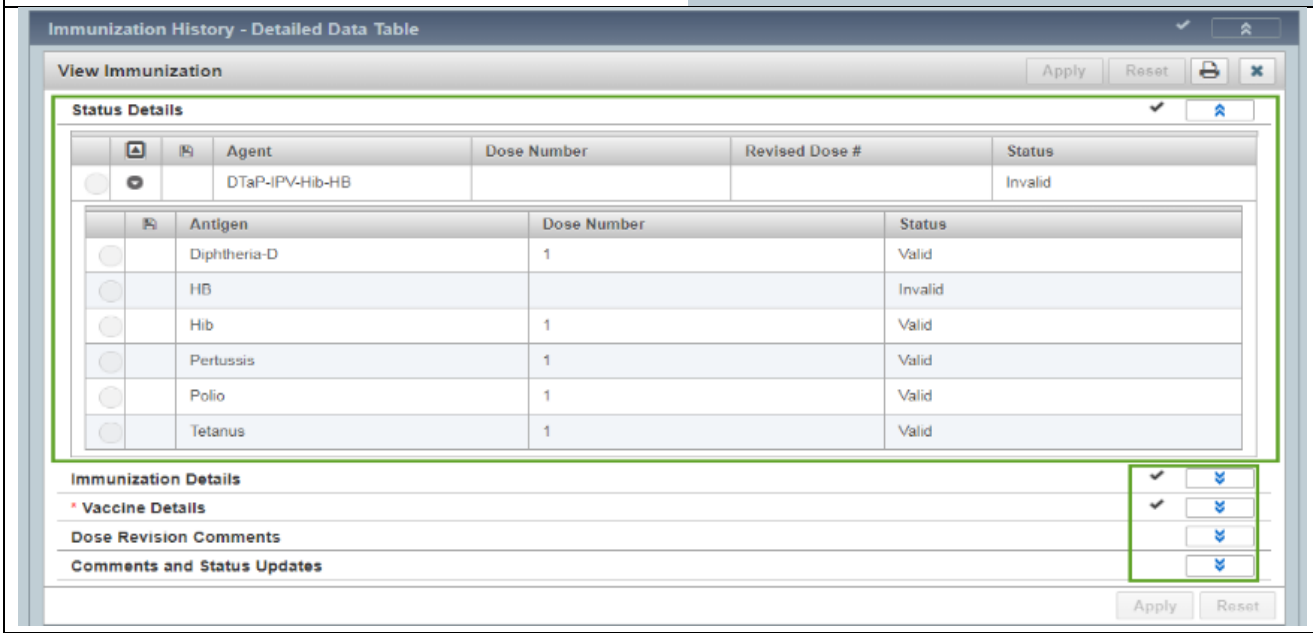
This applies to both View and Update Immunization.

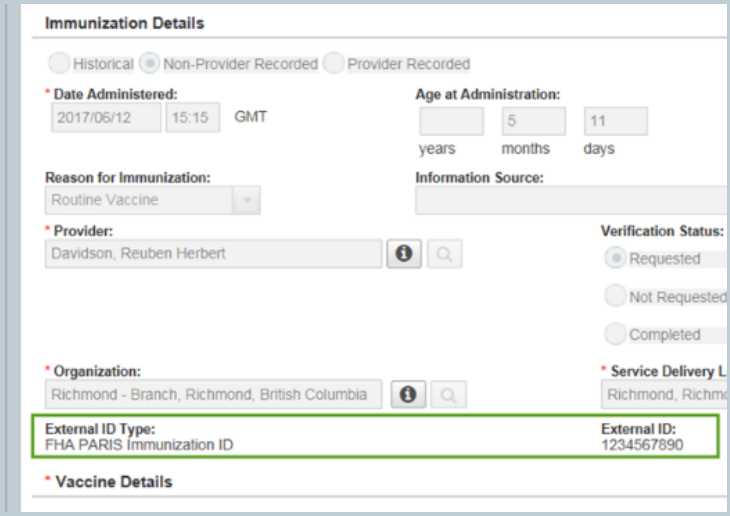
Immunization History - Detailed Data Table

Immunization History - Detailed Data Table

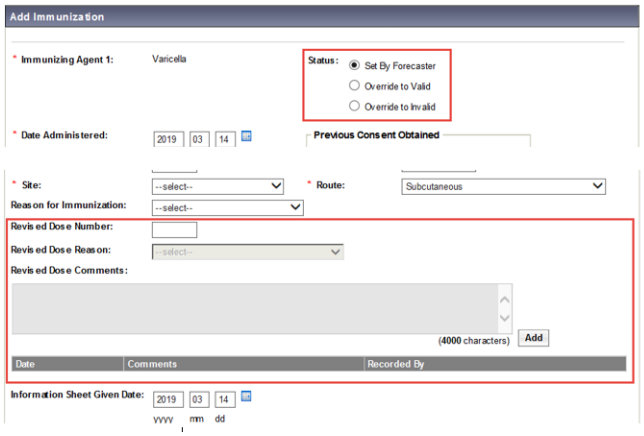
Update | Copy/Replace | View | Delete

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

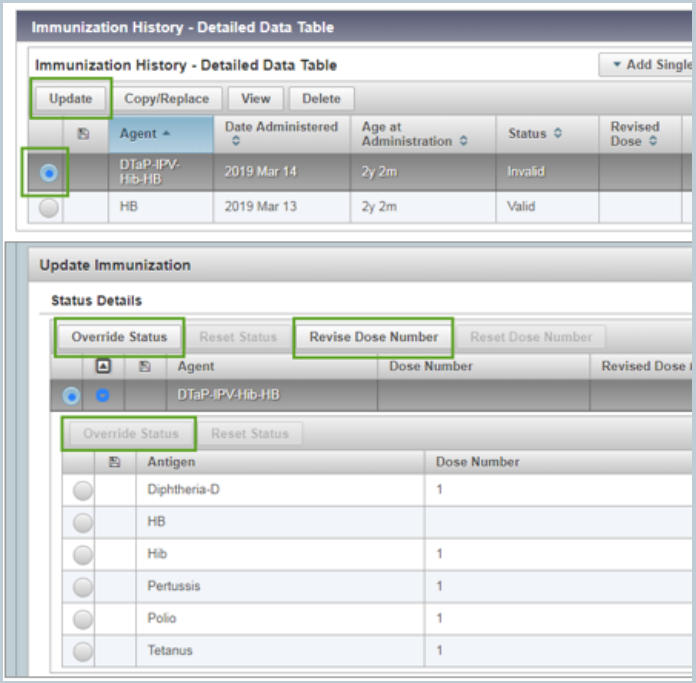


External Identifiers	
R2.5.9, External Identifier fields do not exist.	In R3.2, External ID Type and External ID are added for External Identifiers, e.g. • NHA CeDaR Immunization ID • FHA PARIS Immunization ID • VCH PARIS Immunization ID This applies to both View and Update Immunization. 
Update Immunization	
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.

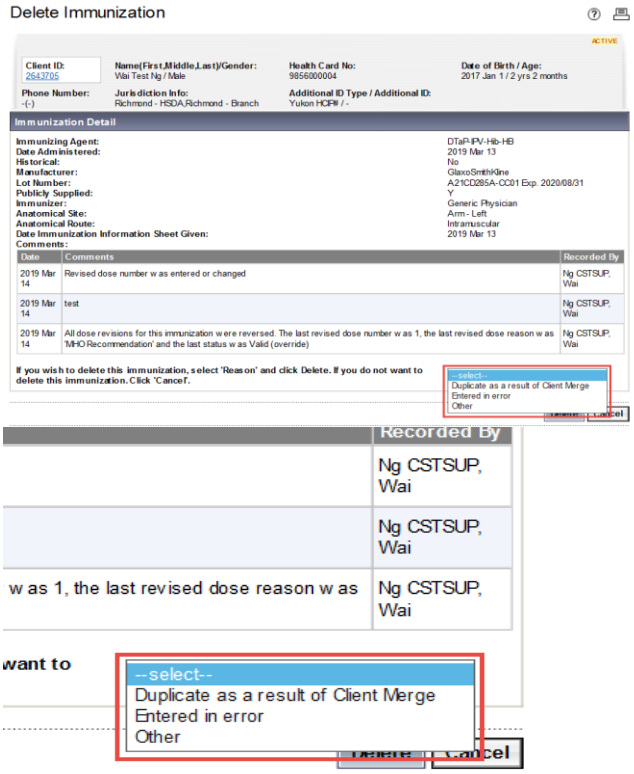


2. A dose number can be revised by using the Revise Dose Number button at the Agent level.

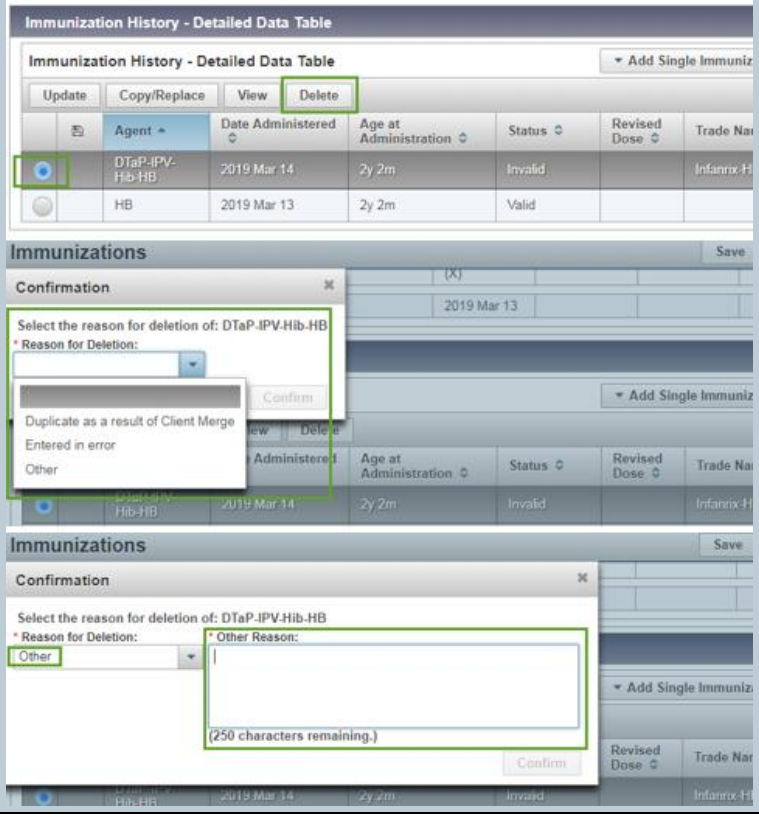


Delete Immunization

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.



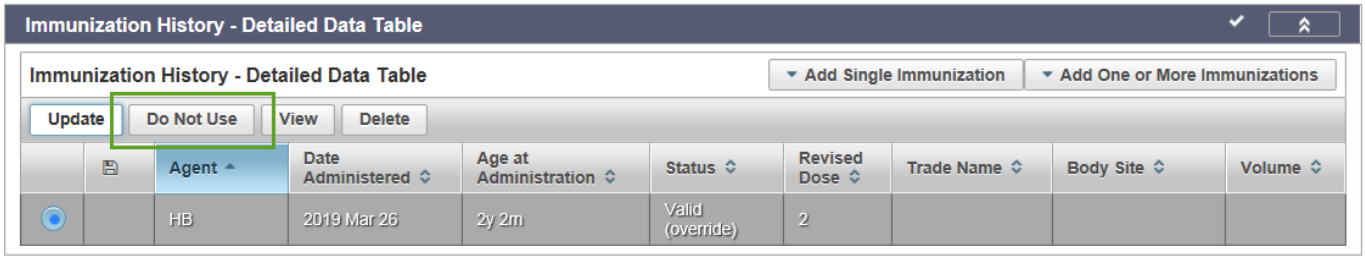
R3.2,
An Immunization can still be deleted, but now this is done in a modal. If "Other" is selected as Reason for Deletion, the Other Reason must be entered.



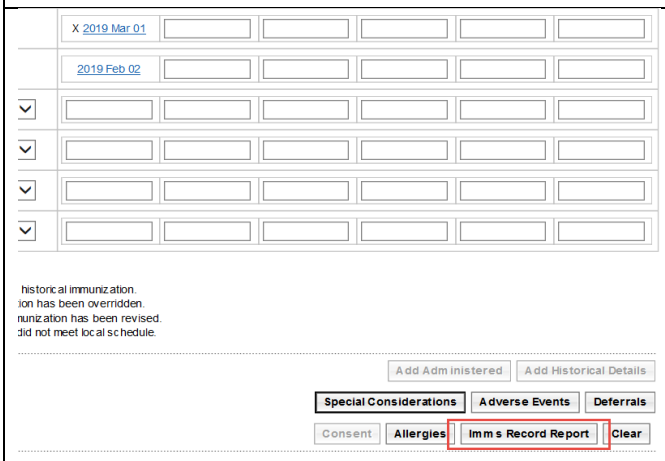
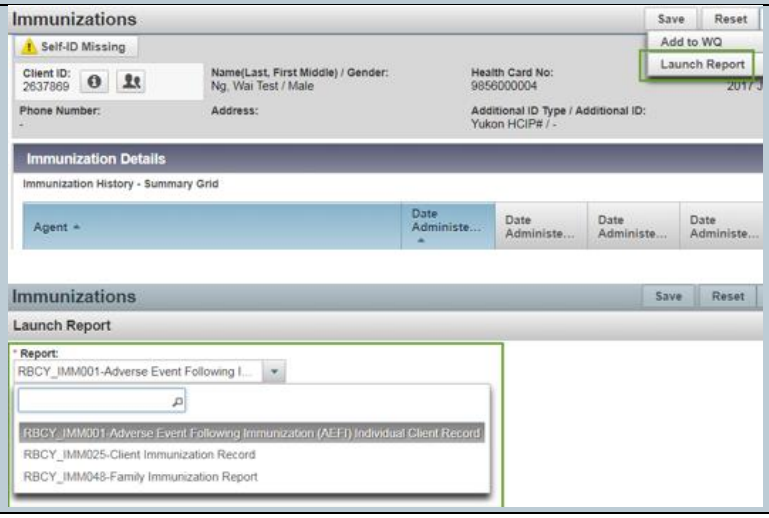
DO NOT USE – Copy/Replace function

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:	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)
	

Forecaster

Immunization Forecast by Agent/Antigen	

R2.5.9
• This section is titled Immunization Forecast (by Agent)
• Leftover antigens are broken out separately into rows at the bottom of the table
• Legend keys for special table values appears plainly below the table
	R3.2
	• 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)
	• Leftover antigens (LOA) are no longer separated out, but appear in the table according to sorting order rules
	  ○ LOA is indicated in the More Info column
	• Table columns are now sortable
	• 'Eligible' and 'Due' columns have been reordered with respect to each other
	  ○ 'Eligible' now appears to the left of 'Due'
	• New Columns:
	'More Info' column
	  ▪ shows LOA for rows that are leftover antigen forecasts
	  ▪ shows EDS when the row forecasts an agent that contains one or more extra dose safe antigens
	  ○ 'Overdue Date' column
	  ▪ Shows the date that the Forecaster calculated as when the child becomes overdue for the forecasted agent/antigen
	  ▪ Placed to the right of 'Due' column
	• Renamed columns: generally behave the same as in R2.5, but just have new column headers for clarity of purpose
	  ○ 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
	  ○ 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'
- 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 reorded 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

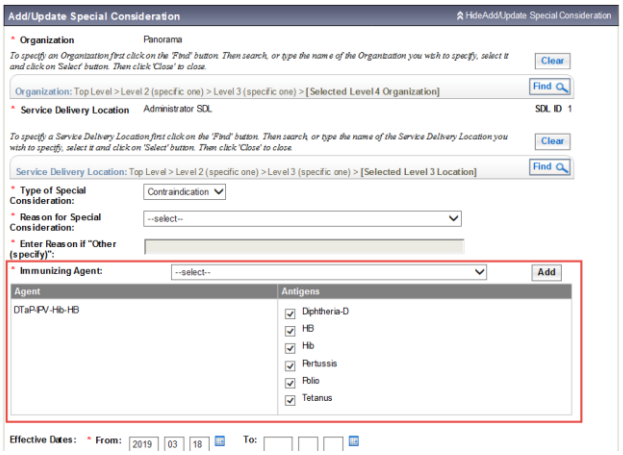
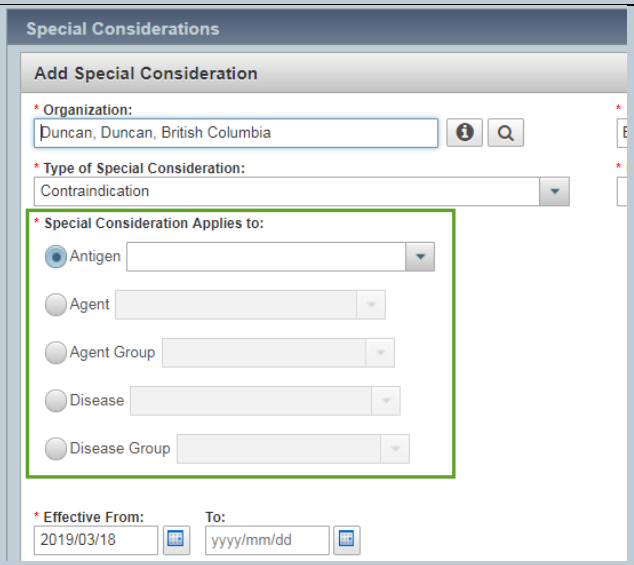
Forecast Status calculated as of: 2019 Mar 21 Refresh Forecast

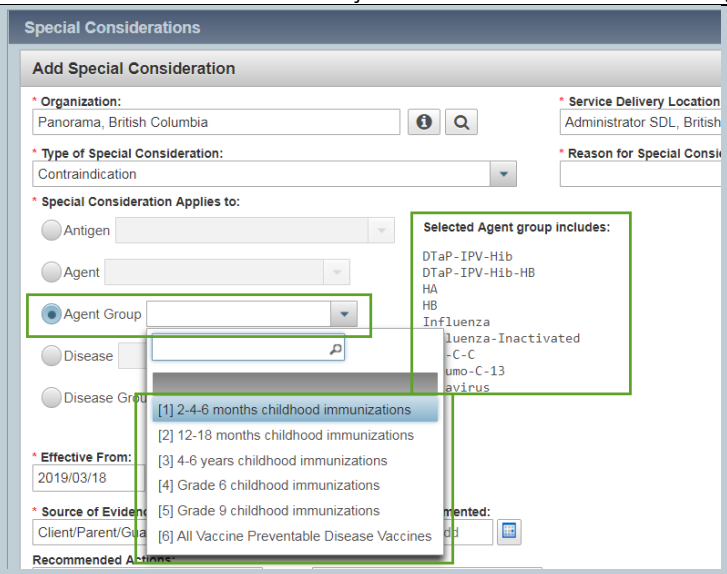
Filter by Disease Group:
Vaccine Preventable Disease Disease Group

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.

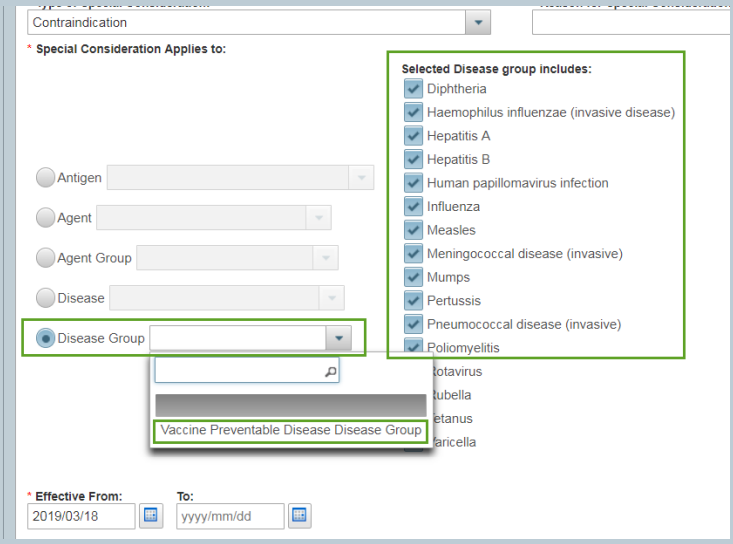


Disease Group

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

- Vaccine Preventable Disease Disease Group

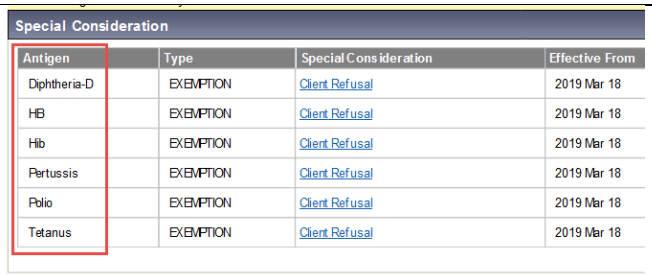
When applying a Special Consideration to a Disease Group, the Diseases associated with the group are displayed for further deselection, and a separate Special Consideration will be created for each of the selected Diseases.



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:

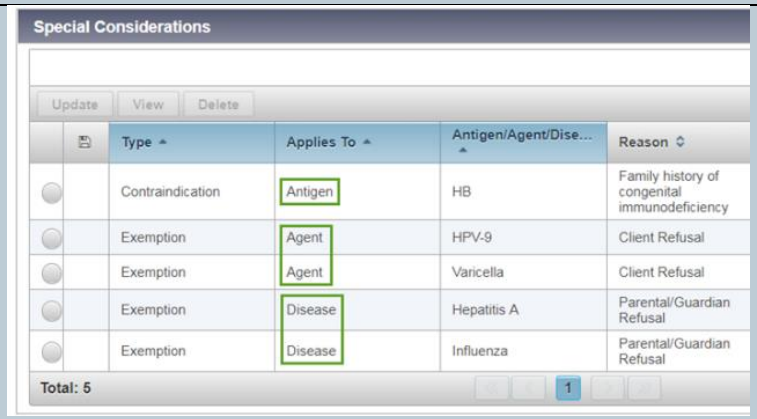


Special Consideration

Antigen	Type	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	Client Refusal	2019 Mar 18
Polio	EXEMPTION	Client Refusal	2019 Mar 18
Tetanus	EXEMPTION	Client Refusal	2019 Mar 18

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

1. <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.
2. <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.
3. <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**).
4. <u>Selecting a **Disease**</u> allows the user to create a Special Consideration for just one Disease, the saved record will be for the single **Disease** selected.
5. <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**).



Special Considerations

Update View Delete

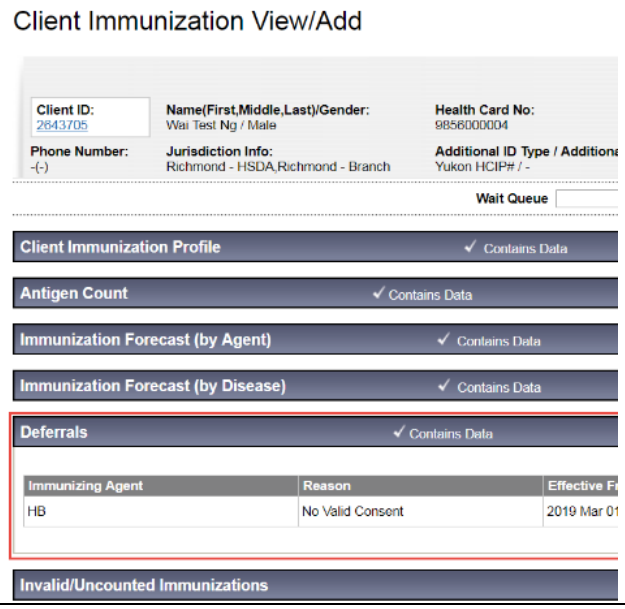
	Type	Applies To	Antigen/Agent/Dise...	Reason
	Contraindication	Antigen	HB	Family history of congenital immunodeficiency
	Exemption	Agent	HPV-9	Client Refusal
	Exemption	Agent	Varicella	Client Refusal
	Exemption	Disease	Hepatitis A	Parental/Guardian Refusal
	Exemption	Disease	Influenza	Parental/Guardian Refusal

Total: 5 1

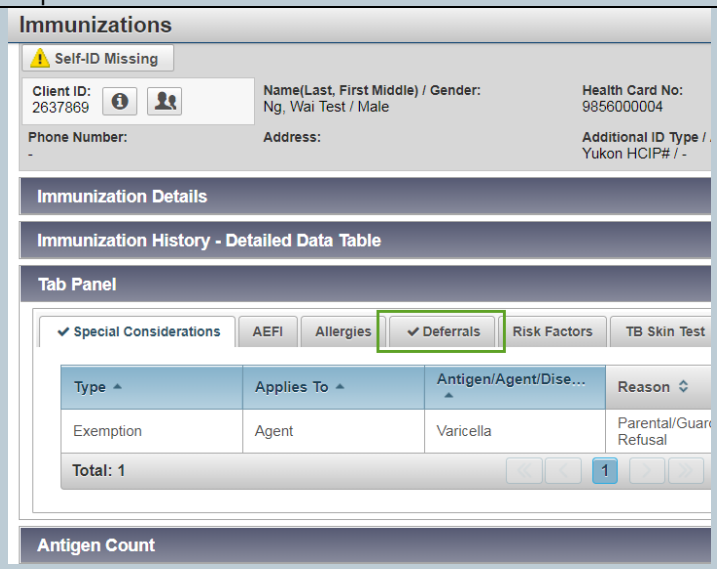
Deferrals

Viewing Deferrals

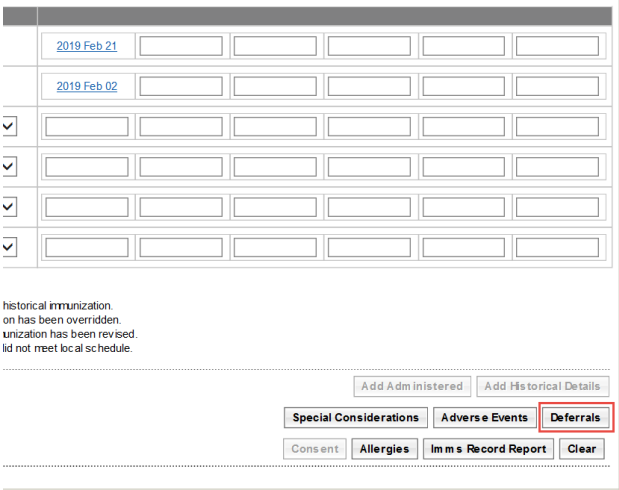
R2.5.9
The Deferrals are displayed in the Deferrals section on the Client Immunization View/Add screen:



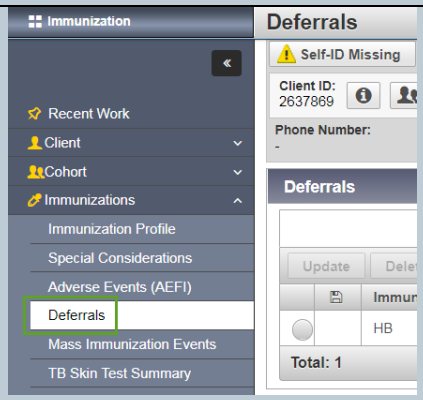
R3.2
The Deferrals are still displayed in the *Immunization Profile* screen, but are now as part of the *Tab Panel* section of important information:



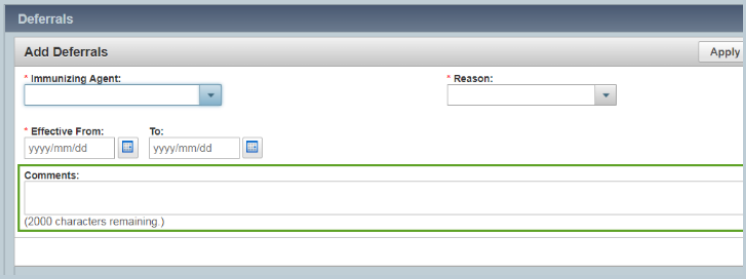
R2.5.9, the Deferrals are added or updated via the Deferrals button under the *Immunization Profile* section of the *Client Immunization View/Add* screen:



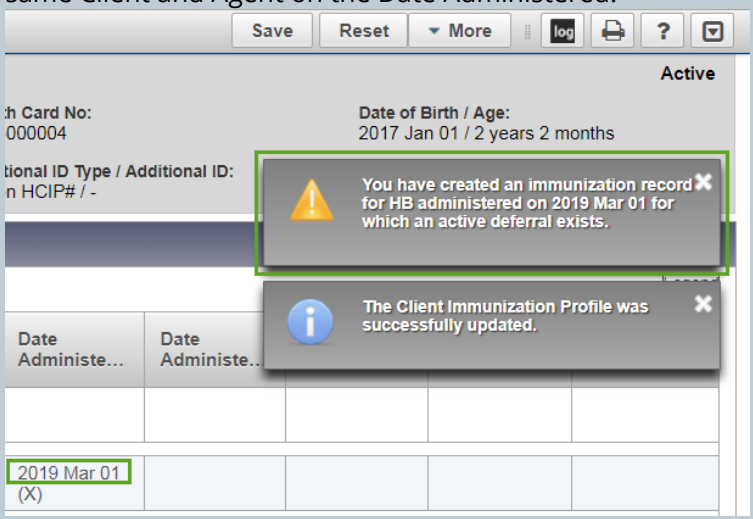
R3.2, the Deferrals are added or updated via the Left Hand Navigation (LHN) > Deferrals under the *Immunization Profile* section of the *Client Immunization View/Add* screen:



R3.2, Deferrals contain Comments field:



Warning for Recorded Immunization

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.