

First Nations Health Authority Health through wellness

Panorama Guide

Immunization Data Entry

Version 3.2

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

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Selecting Clients - Opening Client Records

					Client Quick Entry	Create Clien
Preview Update Se	t In Context Create Cohort Clien	t Imms Profile				
Client ID \$	Health Card Number \$	First Name	Gender ≎	Date of Birth	Health Region 💲	Active :
Preview	1					
Client File	Status					
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Client Info	rmation					
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	Client Na	ame: Fl	Vlmmuni	zations,	Demo	
Prefe	rred Alternate Na	ime:				
	Health Card Num	ber: 9	3560000	004 - Bri	tish Colum	bia Pe
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1.1.1.1						
nmunizations				Save	Reset 💌 More	
🔥 Alerts 🔥 Notes	A BC Self-ID Missing					
Client ID: 0	Name(Last, First Middle) / Gender: FNImmunizations, Demo / Male		Health Card No: 9856000004		Date of Birth / A 2015 Jan 01 / 4	ge: I years 6 months
Phone Number:	Health Region Organization: Thompson Cariboo Shuswap,Williams	Lake	Additional ID Type Yukon HCIP# / -	e / Additional ID:		

- 1. Search client following your choice of search options (See Core Guide).
- 2. Using the search results table, choose a single client by selecting the checkbox next to the *Client ID column*
- 3. Under *Row actions*, you will have several choices depending upon which module you are in. In the *Immunization Module* your choices are:
 - Preview
 - o Update
 - o Set in Context
 - o Create Cohort
 - o Client Imms Profile
 - o Client Quick Entry
 - Create Client
- 4. If you are not sure which client is the one you are looking for, you can preview a client's file by selecting the checkbox to the left of the *Client ID* column and then select the **PREVIEW** button to give you more client information.
- 5. Once you have found your client, it is suggested that you select from the *Row Actions* **Client Imms Profile** as this places the client in context (ie. Opens the client's immunization file).

Note:

- 6. Ensure Client Header is set to correct client in context.
- Make sure that you have updated: Client Details (See <u>Core User Guide</u>)
 - Client Demographics
 - Indigenous Information
 - Allergies
 - o Risk Factors

View Consent from LHN

- 1. Make sure your client is in context within the *Immunization* module.
- 2. Select Consent Directives from the LHN
- 3. Select Immunization Service
- 4. Scroll to the bottom of the screen and see if informed consent has been obtained.

You can enter consent through this page by selecting Add.

You can also enter consent through the Immunization profile.



Entering Consent from IMMUNIZATION PROFILE page

- 1. With client in context, from LHN go to IMMUNIZATION PROFILE
- 2. Scroll to Immunization History Detailed Data Table
- 3. Select **Add Single** OR **Add one or more immunizations** if obtaining consent for more than one immunization.
- 4. In Drop Down menu select Add Administered.
- 5. Select agent from drop down list by clicking in the box on the Left of the Immunizing Agent area.
- 6. If more than one agent is given, move down to the next empty immunizing agent box
- 7. Double click in date box to the right of the agent to enter default date (today's date) or you can enter date as required.
- 8. Choose **Record Consent**
- 9. Agent(s) will be pre-populated on consent page
- 10. Client Directive area will be pre-populated with Confirmed and Grant.
- 11. The effective date will default to today's date (can be changed).
- 12. Consent Given By Indicate who is giving consent by choosing from the drop-down list
- 13. Choose the **Form of Consent** from the drop-down list

14. Consent Given To

- Not Specified
- Current User defaults to users name
- Name: Last Name, First Name Designation (Eg, Smith, John RN)
- 15. Select Save
- 16. Once you have completed documenting consent, and selected save, it will generate back to the **Add Multiple Immunizations Page**
- 17. Continue documenting Immunization details (see Record Immunizations)

IMPORTANT NOTE: Immunization refusals are not be entered in the CONSENTS page. To enter a refusal please enter using instructions in the **SPECIAL CONSIDERATIONS** section

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isk Factors	Immuniza	ition History - D	etailed Dat	a Table						*
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Immunization Guide



Enter Consent from LHN (Enter in Advance)

Consent can be entered in advance. Ex: Phone consent or when you are documenting an administered immunization.

LHN – Consent Directives

- 1. Make sure your client is in context within the *Immunization* module
- 2. Select Consent Directives from the LHN
- 3. Select Immunization Service
- 4. Select the **Add** button (repeat for each agent given).
- 5. Consent modal will appear. The Client Directive area will be pre-populated with Confirmed and Grant. The effective date will default to today's date (can be changed).
- 6. Select Agent from drop down menu- Click on arrow to select associated Antigens

7. Consent Given By (three choices):

- a) Not Specified
- b) Related Client: Includes any linked family member to client
- c) Other: Enter name and relationship of individual who is providing consent
- 8. Choose the **Form of Consent** from the drop-down list (three choices):
 - a) In person
 - b) Telephone
 - c) Written
- 9. Choose Consent Given To (three choices):
 - a) Not Specified
 - b) Current User defaulted to your name
 - c) Last Name, First Name

10.Select Apply

nt Details	Consent	Directi	ves				0.1		Ý
Client Demographics							agent obtair	repeat for each ning consent for	Ad
Occupation/Education	Update	Viev	v Confirm	Expire at EOD	Discard Copy as D	raft Documents			
Health Services		1	Status \$	Instruction \$		Antigen \$	Active \$		
Financial Assistance			Filter On 👻	Filter 👻	Directive Type 💲	Filter 👻	Filter On 👻	Effective From 🔻	Effective To 🗘
ndigenous information	0		Confirmed	Grant	Service: Immunization	Men-C-C	Active	2019 Jun 25	
nt Warnings	0		Confirmed	Grant	Service: Immunization	Tetanus	Active	2019 Jun 25	
nt Relationships	0		Confirmed	Grant	Service: Immunization	Polio	Active	2019 Jun 25	
sent Directives ^	0		Confirmed	Grant	Service:	Pertussis	Active	2019 Jun 25	
mmunization Service			Confirmed	Grant	Service:	Hib	Active	2019 Jun 25	
II Directives			Commed	Grant	Immunization		Active	2019 301 23	
* Consent Applies To Antigen Select Op All Antigens	o: tion: Selecte	d Antige	obtaini consen	ing It for	N	umber of Doses:	:		
All Antigens	Selecte	d Antige	Select Antiger	ns:					
DTaP-IPV-Hib-HB	•	→	Select an Agen	t and click the arro	ow to display Antigen	S.			
* Instruction:	Reasor	n for Re	fusal:	Reason Descrip	remaining.)				
* Status:									
Confirm Effective From: 2019/06/25	To:	/dd	Form of 0	Consent:	- [Consent Give Select 1 of 2	n To		
Consent Given By:						Consent Given To	o:		
Not Specifie	d								
Related Clie	nt Fa	ther: FI	VInvestigations,	Demo 👻		Not Specifie	ed		
Other	Re	lations	hip Type 👻			Name			Current User
Consent Given Indicate who is giving consent.	Ву								

Risk Factors

In order for Panorama to forecast for Hep A for Indigenous clients, a risk factor of Special Populations –Indigenous under 19 yrs must be entered.

Also, if a client has a significant Risk Factor such as Immunosuppression or Hep B that affects the forecaster, this risk factor should be entered.

- 1. Ensure your client is in context.
- 2. LHN > Client > Risk Factors
- 3. Risk Factor page will populate. If there are current risk factors, they will be presented in the table.
- 4. Select **Add** to add a new risk factor.
- 5. Category field not required
- Under Risk Factor on the drop-down list choose "Special Population – Indigenous under 19 yrs (*). This ensures Hepatitis A is put into the forecaster. The (*) indicates that this risk factor affects the Forecaster.
- 7. Select **Yes** in the Response field
- 8. **Effective From** date not required but can enter client's DOB
- 9. **Reported Date** will populate to today's date
- 10. **Frequency** and **Reported By** fields can be completed if applicable
- 11. Select **Apply** to add the risk factors to the Risk Factor Summary table.
- 12. The risk factor(s) will populate in a table
- 13. Repeat steps 4-11 to add additional risk factors

# Immunization	Risk Factors		Add to WQ	Save Reset
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Client Details ^	Risk Factor		Drop Dow Menu	
Under the Category	Add Risk Factor			Apply
section, choose relevant field <u>i.e</u>	Category: Risk Factor: Special Population - Indigenous under	d 🔻		
a mandatory field)	Additional Information:	p B over 28 days old (f	nousehold, sexua	al, 🔨
Client Warni	Special Population - High risk for p	neumococcal (*)		
Client Relati factors	Special Population - Indigenous un	nder 19 yrs (*)		
Client House from LHN	* Response: Special Population - Low Birth Wei	ight - under 2000g (*)		
Consent Directives 🗸 🗸	Special population - MSM (*) Special Population - Neonate horn	to Hen R positive or h	igh rick mom (*)	
Allergies	Effective From: Effective To:	other risk for Hen B (*)		
Risk Factors	yyyy/mm/dd	ly .		
Upload Clients	Reported by Details:			~
Client Merge				

View Immunization Profile

The Immunization profile functionality (*Client Immunization Summary* screen) provides a complete overview of a client's immunization status.

To view Immunization Profile: LHN > Immunizations > Immunization Profile

TIP: If the section header displays ' **Contains Data**', this indicates that the section has some data in it.

Immunization Details > Immunization History - Summary Grid

The Summary Grid provides an overview of the client's immunization history. Cells in the columns display dates for subsequent immunizations with the same agent, across a given row, and are read from left to right. This history includes both administered and historical immunizations

X: If the administered dose was validated according to the rules of the Panorama Forecaster and it did not meet the criteria of the local schedule (BC and Yukon Immunization series), it would be marked by an '**X**', indicating an Invalid Immunization.

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.

Immunization History - Detailed Data Table

The Detailed Data table allow users to view more details for each immunization/sort as needed. Through the Detailed Data table one can view see comments by selecting a specific agent in the table and select UPDATE or VIEW. User has option to sort results by **Agent** or by **Date**, via the radio button.

<u>Tab Panel</u>

Provides an overview (view only) of the client record without needing to navigate to specific screens.

- **Special Considerations**: lists any *Contraindications, Exemptions, Precautions.*
- **AEFI:** lists any Adverse Events Following Immunization recorded for the client.
- Allergies: lists any active allergies.
- **Deferrals:** displays a summary of the immunizations that have been deferred and should not be administered to the client until the reason for the deferral is resolved.
- **Risk Factors**: displays only risk factors indicated under immunization category.
- **TB Skin Test & IGRA Tests**: displays a list of the TB Skin Tests & IGRA (Interferon Gamma Release Assay) tests that have been administered to a client.
- Mass Imms: displays any Mass Immunization Event that the client is attached to.
- **Consent:** displays any consent that has been obtained for client

Antigen Count

The *Antigen Count* section lists all the antigens administered and counts the number of valid vs. invalid doses.

Immunization Forecast by Agent/Antigen

The *Immunization Forecast* section provides a summary of the immunizations the client is recommended to receive. It indicates whether each immunization is *Up to Date, Due,* or *Overdue;* and the eligible and due dates for the client to receive the dose. The forecast is client-specific and is calculated based on the Jurisdictional Immunization Schedule, factoring in the client's age, gender, risk factors and current immunization history. Refer to *IMMS Forecaster Handbook-System Guideline-Immunizations* for more details on the Forecaster and to the BCCDC Immunization Manual for the schedule.

Includes immunization agent/antigens forecasted by:

- Eligible The Eligible Date has been reached, but the Due Date is in the future.
- Up to Date: Not yet Eligible/Due for a specific agent "Due in the future"
- Due: Time period between the Due Date and the Overdue Date
- Overdue: After a certain time period, generally one month from the due date, forecasted agents/antigens are considered "Overdue." Overdue also considers minimum intervals: if a client is behind on their immunizations, his/her status will remain "Up to Date" until the minimum interval has passed, then it will become "Overdue."

Immunization Forecast by Disease

Displays all antigens forecasted by disease.

Invalid Immunization Reasons

Displays a list of the immunizations that were administered to the client and were determined to be invalid based on the BC and Yukon Immunization Schedule. Immunizations are evaluated using the validation rules within the Panorama Immunization Decision Support Tool (Forecaster) and will be marked invalid when a clinical interval has not been met (see the IMMS Forecaster Handbook for more details). Immunizations can also be invalidated by a user. The reason for invalidation is provided in the summary table.

1.							
🔗 İm	nmuniz	ations	;			^	
In	nmuni	zation	Profil	e			
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2.							
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		Allergy			Allergy: Reaction	Crab, Sever	rity: Severe, aphylaxis
2019 Jun 26 2019 Apr 19		Client V Special Contrai	Varning Consideration: ndication		Safety (Antigen reaction vaccine	Concern - se :: HA, Reaso n to a previous or any of its	ee notes in: Anaphylactic us dose of the antigens
		Contrai	ndication	I	vaccine	or any of its	antigens

Steps to View Client Imms Profile

- User is in the **Immunization module** (tab).
- Client's record is in context.

There are three ways to access the *Client Immunization Profile* screen:

- Click Left Hand Navigation (LHN) < Immunizations < Immunization Profile. The *Client Immunization Profile* screen displays.
- If Client is displayed in Recent Work, click LHN > Recent Work > Immunization Summary hyperlink below the Client Name. The Client Immunization Profile screen displays.
- Click LHN > Client > Search Clients. Enter search criteria and click Search. Select the Client ID from the Client Index: Search Results table then click the Imms Client Profile button. The Client Immunization Profile screen displays with the client in context.
- To view more details of the sections from the *Client Immunization Profile* screen, select the functionality from the LHN. For example, to view more details of the Special Considerations & Risk Factors select:

Immunization > Special Considerations

Client > Risk Factors

(Note: **Allergies** and **Client Warnings** can be accessed from the **LHN**, as well.)

5. In the Client header, look for any **Alerts** and **Notes**.

Alerts will include any special considerations, allergies, client warnings.

Record Immunizations

munizations v	Varicella		2019 May 10 (X)	2019 May 10 (X)				
ecial Considerations	Zoster-Inactivated		2019 Jun 20						
verse Events (AEFI)									
ferrals	Immunization History - De	etailed Data '	Table					·	
iss Immunization Events	Immunization History - D	etailed Data	Table		▼ Ac	ld Single Immuniza	tion 🔻 Add One o	or More Immunizations	
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- Ensure your client is in context. These instructions assume that consent has been recorded either from the LHN Consent Directives Page or from the Immunization Profile page.
- 2. Left Hand Navigation (LHN) < Immunizations < Immunization Profile Scroll to Immunization History Detailed Data Table
- 3. Select Add Single Immunization or One or More Immunizations.
- 4. Select option of Add Administered.
- 5. Choose agent(s) from the drop-down list by clicking in *Immunizing Agent* section
- Double click will default to today's date.
 Enter date of immunization administration.
- If more than one agent given, move down to the next empty *Immunizing Agent* box and choose agent. Repeat as required.
- 8. Select Record Consent
- Complete mandatory fields for consent -See Entering Consent pg 4-6

10. Once completed & saved, select the Enter Details button.
 11. Fill in the mandatory fields for each agent a. Provider should be you, if not present, use Find button i. Select Find ii. Start typing in your last name iii. When your name appears, click it iv. Click on Select b. Lot # (will automatically populate the Manufacturer, dose, etc) c. Site d. Route e. Best practice is to enter the Time, Reason for immunization, and any comments.
12. After entering the details for an immunization, the Next button is used to apply this record and move on to the next record if entering additional immunizations. A new screen will populate for the next immunization. Once the last immunization documentation is completed select FINISH .
13. Screen will navigate to immunization profile, select SAVE to save the immunization documentation.

d Immunization		Next	Delete	Reset
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Add Historical Immunizations

Historical immunizations are those not given by the nurse entering them.

Example: when you get a paper record from out of province or from a FNSHO not using Panorama.

When entering immunization histories, you do not have to enter consent as long as it is captured elsewhere.

Client Merge		imm	unizat	ion History - D	etailed Data Table			_			× •
Resolved Client Matches	•	Imm	uniza	ration History - Detailed Data Table Add Single Immunization						 Add One or More Immunizati 	
Immunizations	^	Up	date	Do Not Use	View Delete					Add Historical	
Immunization Profile			8	Agent 🔺	Date Administered \$	Age at Administration \$	Status \$	tevised Dose ♀	Trade Name 🗘	Add Administered	Volume 0
Special Considerations				DTaP-IPV-Hib-	2019 Apr 30	4v 3m	Invalid		Infanrix-HEXA	Arm - Left	0.5 mL

Add Multiple Immunizations		Re	ecord Consent Apply W	lithout Details	etails Reset
Immunization Type: Historical Include non-inventoried agents Click a table cell to select or	enter a value	e.		Entry can happen w without details	/ith or Add
Agent		Date 1	Date 2	Date 3	Date 4
DTaP-IPV-Hib-HB	•	2019/06/27	yyyy/mm/dd	yyyy/mm/dd 🔳	yyyy/mm/dd
Men-C-C		2019/06/27	yyyy/mm/dd 🔢	yyyy/mm/dd	yyyy/mm/dd

- 1. Ensure your client is in context in the Immunization module.
- 2. Left Hand Navigation (LHN) < Immunizations < Immunization Profile Scroll to Immunization History Detailed Data Table
- 3. Select Add Historical Immunization
- 4. Choose agent(s) from the drop-down list by clicking in *Immunizing Agent* section
- 5. Enter the date of vaccine administration. If more than one date is being entered for the same immunization enter in the next date field.
- 6. Select either option of **Apply Without Details** or **Enter Details**.
- 7. If details are to be added, use the **Enter Details button.**
- 8. If the **Enter Details** button is clicked, the second screen is displayed for entering details of the first immunization is presented. Separate screens will generate for each immunization agent.
- 9. Choose the appropriate selection from the **Information Source** drop-down list.
- 10. There are no mandatory fields, however please ensure you always enter in the correct date for the correct agent. Any other information you have available can also be entered in here. Best practice is to enter all information known, so if you know lot# etc, please enter it.
- 11. Comments are optional.
- The verification box would <u>only</u> be used if a CLERK is entering immunizations on behalf of a nurse (not best practice).
- 13. Once the last immunization documentation is completed select **FINISH**.

Add Immunization Next Delete Reset Immunization Type: Indextal Immunization Type: Indextal Immunization: mmunization: Immuniz	Ad Immunization Type:		14. Screen will nav profile, select S immunization c	igate to immunization AVE to save the documentation.
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		comments:		

Print Immunization Record

You can print out an immunization record with as much or as little information as required for the purpose.



Example: if giving it to a parent for daycare or school registration, only the Administered Imms section is required.

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Printing from LHN

- 1. Ensure your client is in context
- 2. Select **Reporting & Analysis** from the Left Hand Navigation

Select Reports

Left Hand Navigation (LHN) < Reporting & Analysis< Reports

- 3. Open the Immunization module by selecting the arrows.
- 4. Scroll down to view available reports.
- 5. Select IMM025 Client Immunization Record. hyperlink
- Set Report Filters. Choose the criteria you wish to have included in the report. If the report is for an outside agency that only needs the basic record, choose NO for all options.
- 7. Select Generate Report
- 8. When you are finished, select the X in the upper right corner to close the window.

at Peport Filters	n Generate Report Now
Return	
Report: RBCY_IMM025-Client Immunization Record	
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Client ID:	
2456992 * Include Confidential Address/Phone information:	
Yes	
Yes -	
* Include Forecaster: Yes •	
* Include Special Considerations:	
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Save Reset More	Immunization page
Add to WQ	1. Have the client in context and the
Health Card No:	Immunization Summary page open.
9856000004 2015 Jan 01 / 4 ye	2. Select More from the top right page of
	client banner Immunization page.
	2 Scroll to specific report you wish to
	generate.
	4. Select confirm tab.
	5 Penort Prompts screen will appear
	Choose the criteria you wish to have
	included in the report. If the report is for
	an outside agency that only needs the
	basic record, choose NO for all options.
	6. Report output automatically defaults to
	7. Select Generate Report Now tab.
	8. A new window will open with the report
	presented. You can then print it.
	9. When you are finished, select the X in the

eport: BCY_IMM025-Client Immunization Record			
Report Prompts			\$
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PDF Excel (Data Only)			
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2456992	Yes	· ·	
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Include Special Considerations:	* Include Deferrals:		
No	No	*	
Include AEFI's:	* Include Risk Facto	rs:	
No	No	*	

Deferrals

Deferrals are made when an immunization is temporarily put on hold, not totally refused or excluded due to contraindications.

Deferrals may happen when a parent chooses an alternate schedule (limiting the number of shots given at one time) or when a vaccine is not available due to inventory issues.

Add

1. Make sure the client is in context in the Immunization module.

Select **Deferrals** from the Left Hand Navigation Left Hand Navigation (LHN) > Immunizations >Deferrals

- 2. Select Add
- 3. In the Add/Update Immunizing Agent Deferral section, choose agent from the drop-down list.
- 4. Choose Reason from drop-down list
- Enter Effective From and Effective To date.
 Effective To date is the date when the client intends to have vaccine administered. This will end the deferral. Once the Effective To date has surpassed, the deferral will be removed and will need to be re-entered if it still applies.
- 6. Select Apply
- 7. Repeat process for other agents as appropriate.

NOTE: Deferrals will not affect the forecaster for the Immunization schedule. Adding **Exemptions** will affect the forecaster

8. Insert a note re: deferral for added details to ensure others viewing imms record are aware of the deferral/altered schedule.

Add Deferrals	Apply Reset
	Reason:
(2000 characters remaining.)	Recommended
	Apply Ro

Notes

Notes can be saved at the client level (general notes) or associated to an encounter such as an immunization. You also need to use notes if you enter a manual warning.



- 1. Select Notes on the LHN. LHN > Notes
- 2. Scroll down the page and select **Author Note**
- 3. If doing a note for a Warning, use the same wording as in your Warning for the Subject of the note.
 - use the acceptable wording types such as Safety Concern for Staff)

Note Subject Line- Enter the note subject line in the following standard:

Panorama Module	Available Encounter Groups	Subject Line's Required Prefix
IMMUNIZATION	Immunization	IMM
FAMILY HEALTH	Family Health	FH
INVESTIGATIONS	Tuberculosis Disease Investigation	ТВ
	Communicable Disease Investigation, excluding TB and STI	CD

[Encounter Group Prefix] - [Note Description]

Eg. FH – Breastfeeding visit with mom and baby

	Eg. IMM – 6-Month Immunization
	Eg. TB- school screening
	4. Complete all required fields ie: Note Date, Time, Subject .
	5. Choose Note type of <i>Nurse</i> from the drop-down list.
	6. There are no common phrases to be selected.
	7. Enter your note in the text box. You can change the font, add underlining, bolding, etc if you want to. This optional.
	8. Select Note Complete
	Uploading a document into client notes ** Please see Advanced Checklist-Uploading a document into
lotes	★ Hide Note
Votes Display Notes For: Client: FNImmunizations, Demo	★ Hide Note ✓ Include Related Entities: ✓
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e ID: -		Status: -	
Author: Subject:	TRAINER01, Cathryn	Role: BCY-FHSH-Prvdr-Clk-All	
Note Date:	2019 /07 /04 🔤 yyyy mm dd	Time: hh mm	
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Note Corrections

Note is ass	ociated with Client ID 2456992	2		1.	If still on the Notes page, Select Correct Note.
Note ID: Author: Role: Note Type: Subject: On altered sched	4426287 TRANER01, Cathryn BCY-FHSH-Prvdr-Clk-All Nurse IMMS Ule due to	Status: Note Date: Completed Date:	Complete 2019 Jul 4 08:52 PDT 2019 Jul 4 Correct Note Close	2.	If you have left the Notes page.a. Go to Notes on LHNb. Select the note from the table by clicking on the button to the left of the notec. Select Update Note
				3.	Correct the note with a few more details- and then select Note Complete
				4.	You will see the current note (corrected). There is now a choice to View Corrections.
				5.	To see the original copy of the note, select the View Note Corrections button and a list

Lab Itotes Document Management	Workgroup for Author: Vorkgroup for Transcriber: Author: Vorkgroup for Transcriber:		will display the original note as well as your newly corrected note.
 Reporting & Analysis Workgroups Administration 	Note Type:	6. 7.	Note that deleted words are crossed out and in red and added words are in green. Select CLOSE
2	Display Clear 1 results found. To view a Note below, clock on its Note Date. The list reflects the records you have access to Row Actions: View All Notes in Table Update Note View Note View Note Corrections Author Note	8.	After closing the note, you should now see a Notes alert in the client header.
	Move selected note to Move life <u>Created Date/Time</u> Mote Date/Time Mote Type Subject Line Author Attached To Status Corrected	9.	To view notes, select the hyperlink (blue underlined Notes).
	2019 Jul 4 09:07 PDT 2019 Jul 4 08:52 PDT Nurse MMS TRAINERD1, Cathryn Client 2456992 Complete	•	Notes now appear in a table below the search area. There is a column indicating this note has been corrected. Click on the hyperlink (blue underlined date) to view notes from this table. You can also view or make corrections by selecting the button to the left of the note date and then selecting Update Note or View Note Corrections

Special Considerations and Refusals (Will create client warning)

- 1. Ensure your client is in context
- 2. Select Special Considerations from the LHN

Left Hand Navigation (LHN) > Immunizations >Special Considerations

- 3. Select Add
- Ensure your Organization and SDL are correct. If not, use the Find button to select the appropriate locations. Type your SDL slowly, select from drop down list; then push select. Note: Your organization name should begin with Panorama when populated.
- 5. Under **Type of Special Consideration** choose from:
 - a. Contraindication
 - b. Exemption
 - c. Precaution
- 6. Under **Reason for Special Consideration** the choices on the drop-down lists vary under the different types of Special Considerations, according to the BCCDC Immunization Manual definitions. Select the appropriate choice by clicking on the drop-down list

- 7. Once created, an individual Special Consideration cannot be split into smaller components. 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**
- 8. If entered as an **Agent**, it must be updated and deleted as an **Agent**.
- 9. Immunizing Agent: Choose the appropriate agent and select Add.
- 10. Agent Group: There are 6 Agent Groups available for selection to apply to a Special Consideration:
 - a. [1] 2-4-6 months childhood immunizations
 - b. [2] 12-18 months childhood immunizations
 - c. [3] 4-6 years childhood immunizations
 - d. [4] Grade 6 childhood immunizations
 - e. [5] Grade 9 childhood immunizations
 - f. [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.

- 11. **Disease Group:** there is one disease group available for selection to apply to a Special Consideration:
 - Vaccine Preventable 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

12. Fill out details.

- a. The date will be defaulted to today's date. This date can be changed.
- b. Select the Source of Evidence from the drop-down list.
- c. Ignore recommended actions.
- d. Enter comments if necessary. Add
- e. It is optional to add copies of documents or additional disease information. You can also view allergies if helpful.
- f. When this area is complete, select **APPLY**.
- 13. You should now see all of your antigens listed in the Special Consideration table at the top of the page.
- 14. An **ALERT** should also now be displayed in the client header. Click on the **ALERT** symbol (yellow triangle) to view the special consideration.

	onsiderations					
date	View Delete					
8	Туре 🔺	Applies To 🔺	Antigen/Agent /Disease 🔺	Reason 🗘	Effective From \$	Effective To 💠
id Spe rganiza nree Co ype of s ontrain Contrain Exempt Precaut	ecial Consideration ation: orners Health Services, W Special Consideration: indication indication indication tion	filliams Lak 🚺 Q		* Service Delivery Loca Snxastwilxtn Centre, F * Reason for Special Co	ation: Penticton, British Colum	Apply Reset
6. * Rea	ason for Specia	al Consideratio	on:		~	
6. Real Ar Ar Fa	ason for Specia ason for Specia haphylactic read amily history of e	al Consideration	on: ous dose of the ne component munodeficiency	e vaccine or an (except latex)	v of its antigens	
6. * Rea Arr Fa Gu	ason for Specia ason for Specia naphylactic read amily history of uillain-Barre syn	al Consideration	on: ous dose of the ne component nunodeficiency Rotavirus)	e vaccine or an (except latex)	v of its antigens	
6. * Rea Arr Arr Fa Gu Hi Ot	ason for Specia ason for Specia naphylactic read amily history of a uillain-Barre syn istory of Intussu	al Consideration	on: ous dose of the ne component munodeficiency Rotavirus)	e vaccine or an (except latex)	y of its antigens	
6. * Rea Arr Arr Fa Gu Hi Ot	ason for Specia ason for Specia naphylactic read amily history of a uillain-Barre syn istory of Intussu ther (specify) regnancy (for Li	al Consideration	on: ous dose of the ne component munodeficiency Rotavirus)	e vaccine or an (except latex)	y of its antigens	
6. * Rea	ason for Special ason for Special naphylactic read amily history of uillain-Barre syn istory of Intussu ther (specify) regnancy (for Li everely Immund	al Consideration	on: ous dose of the ne component munodeficiency Rotavirus)	e vaccine or an (except latex) /	y of its antigens	

 7. * Special Consideration Applies to: Antigen Agent Agent Group
 7. * Special Consideration Applies to: Antigen Agent Agent Group
* Special Consideration Applies to: Antigen Agent Agent Group
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2019/07/04 yyyy/mm/dd
* Source of Evidence: Date
Client/Parent/Guardian Report 🔹
* Special Consideration Applies to:
A a France
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Agent Agent Agent Men-A Disea: Men-AC Men-B
Antigen
Antigen
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Antigen Agent Agent Agent Men-A Disea: Men-AC Men-B Disea: Men-C-ACYW Men-C-C Effective F Men-P-AC 2019/07/02 Men-P-ACYW-135
Antigen Agent Agent Agent Men-A Disea: Men-B Disea: Men-C-ACYW Men-C-C Effective F Men-P-AC 2019/07/02 Men-P-ACYW-135 Source of Meningococcal Unknown Date

Antigen	Selected Agent group includes:
Agent	DTaP-IPV-Hib HA
Agent Group [2] 12-18 months childho	Influenza Influenza-Inactivated
Disease	umo-C-13 icella
Disease Grov [1] 2-4-6 months childhood immunization	ons
Effective From: 2019/07/04 [2] 12-18 months childhood immunizations [3] 4-6 years childhood immunizations [4] Grade 6 childhood immunizations	ons
* Source of Eviden [5] Grade 9 childhood immunizations Client/Parent/Gua	cines d
Recommended Actions:	
* Special Consideration Applies to:	
* Special Consideration Applies to:	Selected Disease group includes:
* Special Consideration Applies to:	Selected Disease group includes:
* Special Consideration Applies to:	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease)
* Special Consideration Applies to:	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B
* Special Consideration Applies to:	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection
* Special Consideration Applies to:	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Influenza
Special Consideration Applies to: Antigen Agent	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Influenza Measles
* Special Consideration Applies to:	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Influenza Measles Meningococcal disease (invasive)
 Special Consideration Applies to: Antigen Agent Agent Group 	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Human papillomavirus infection Measles Meningococcal disease (invasive) Mumps
 * Special Consideration Applies to: Antigen Agent Agent Group Disease 	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Influenza Measles Meningococcal disease (invasive) Mumps Pertussis
Special Consideration Applies to: Antigen Agent Agent Group Disease	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Human papillomavirus infection Measles Measles Meningococcal disease (invasive) Mumps Pertussis Pneumococcal disease (invasive)
 Special Consideration Applies to: Antigen Agent Agent Group Disease Disease Group Vaccine Preventable Dise 	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Human papillomavirus infection Measles Measles Meningococcal disease (invasive) Mumps Pertussis Pneumococcal disease (invasive) Pheliemyelitic
 Special Consideration Applies to: Antigen Agent Agent Group Disease Disease Group Vaccine Preventable Dise 	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Influenza Measles Meningococcal disease (invasive) Mumps Pertussis Pheumococcal disease (invasive) Pheumococcal disease (invasive) Aumonal disease (invasive) Pheumococcal disease (invasive) Pheumococcal disease (invasive) Pheumococcal disease (invasive)
Special Consideration Applies to: Antigen Agent Agent Disease Disease Group Vaccine Preventable Dise	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Human papillomavirus infection Measles Measles Meningococcal disease (invasive) Mumps Pertussis Pheumococcal disease (invasive) Pheumococcal disease (invasive)
Special Consideration Applies to: Antigen Agent Agent Disease Disease Group Vaccine Preventable Dise	Selected Disease group includes: Diphtheria Haemophilus influenzae (invasive disease) Hepatitis A Hepatitis B Human papillomavirus infection Human papillomavirus infection Influenza Measles Meningococcal disease (invasive) Mumps Pertussis Pertussis Pheumococcal disease (invasive) Pertussis Lavirus bella anus

	Vaccine Refusals
Add Special Consideration * Organization: Three Corners Health Services, Williams Lak Type of Special Consideration: Exemption * Client Refusal * Client Refusal	When a refusal is documented in Panorama, it is as an Exemption ('Client Refusal' or 'Parent/Guardian Refusal') – which in turns suppresses that Agent or Antigen from the Panorama Forecast for the Client To document a refusal. Left Hand Navigation (LHN) > Immunizations >Special Considerations
	Under Type of Special Consideration select Exemption .
	Under Reason for Special Consideration , select Client Refusal or Parent/Guardian Refusal
Note: Refusals (BCCDC Immunization manual, Chapter 2 : Immunization Appendix A- Informed Consent for	End Dating Refusals Background:
Immunization: A refusal is effective until consent is obtained. However, parents should be informed that all refusals will be reviewed at certain milestones and that they may be contacted in the future. Individual circumstances surrounding a prior refusal to vaccination may change; these may include changes in medical status or in philosophical stance, as well as maturation of an individual to an age where they may consent on their own behalf to vaccines previously refused by a parent/guardian. The possibility that there may have been these types of changes should be considered when making approaches in the future to offer immunization services, with a view to avoiding missed opportunities for vaccination. Refusals of vaccines should be documented as per local health authority guidelines. At a minimum, refused vaccines should be reoffered at the following milestones: • Child's 2nd birthday Oblit a the kitch day	 In June 2016 British Columbia Immunization Committee (BCIC) approved a new guideline in regards to refusals; specifically that refused vaccines should be reoffered at the following milestones: Child's 2nd birthday Child's 4th birthday Child's 10th birthday Child's 13th birthday 13yrs and older, 24hrs after refusal date (allows for provision of mature minor consent opportunity) Influenza vaccine should be offered annually
• Child's 10th birthday • Child's 10th birthday • Child's 13th birthday	Documentation
Mature minors should be offered the opportunity to consent for themselves regardless of previous parental/guardian refusal.	• When a refusal is documented in
Note: Influenza vaccine should be offered annually, regardless of previous refusal.	Panorama, it is as an Exemption ('Client Refusal' or 'Parent/Guardian Refusal') –

Child's age at Refusal Effective From	End Date Used	
<dob> - 2 yrs</dob>	Child's 2nd birthday	
2yrs 1 day-4 yrs	Child's 4th birthday	
4 yrs 1 day – 10 years	Child's 10th birthday	
10 yrs 1 day – 13 years	Child's 13th birthday	
13 yrs 1 day – 19 years	24 hrs after refusal date.	

Please Note:

If selecting an exemption for a varicella vaccine. Please note that "self-reported history or physician diagnosed varicella after the age of 1 constitute 'proof of immunity' only if the episode occurred PRIOR to 2004". This reflects the *BCCDC Immunization guidelines for Varicella (pg. 9)*. Otherwise, a documentation of lab confirmed immunity or parent refusal must be entered. which in turns suppresses that Agent or Antigen from the Panorama Forecast for the Client

- To conform with the guideline to re-offer the refused vaccine at the milestone, the Panorama <u>Exemption must be inactivated</u> <u>prior to the next milestone</u>
- The approved Panorama documentation standard now incorporates end-dating the Exemption at the time it is created, using the appropriate future milestone date
- When entering the Exemption, enter a future end-date that aligns with the next milestone birthday. <u>These birthdays are the 2nd, 4th, 10th or 13th birthday</u>
- For Clients presenting after 13 years of age: end-date the Exemption 24hrs after the refusal date.

For Influenza (which should be reoffered annually), end-date the Exemption on June 30th of the current school year

Examples:

- Client presents at 2 years old and the parent refuses MMR. Exemption should be end-dated for the Clients 4th birthday
- Client presents at 14 years old and refuses HPV. Exemption should be enddated for 24hrs after refusal date.
- Client presents at 12 years old and the parent refuses Influenza. Exemption should be end-dated for June 30th of the current school year
- If the Client refuses the vaccine when reoffered, create a new Exemption for the next milestone. Do not update the existing Exemption to extend it
- If the Client re-presents before the future end-date of the Exemption, - reoffer the vaccine, and if again refuses; edit the enddate of the existing Exemption to

	yesterday's date and enter a new Exemption for the new milestone date
Client Alerts	
Client alerts will be automatically created by the system, such as when a contraindication, exemption, allergy and or client warning is entered.	 Automated Alerts 1. Panorama automatically creates alerts for Contraindications, Exemption, Allergies and when the Create Warning box.
	2. To review the alerts, ensure client's record is in context
	3. Select the ALERT hyperlink in the client header. (Yellow Triangle)

Manual Warnings

- 1. Click Left Hand Navigation (LHN) < Client < Client Warnings. The Client Warnings screen displays.
- 2. Select **Client Warnings** from LHN
- 3. Select ADD
- 4. Enter one of the acceptable messages. Note the date defaults to today's date, but can be backdated.
- 5. Select **APPLY**, You will now see a yellow **ALERT** triangle in the Client Header area.
- 6. You must now go to **NOTES** (LHN) and create a note related to this warning.

Client Wa	rnings			✓ (Â)
Undate	View Dolete			Add
- Opulie B	Effective From *	Effective To O	Message 0	
	2019 Jun 26		Safety Concern - see no	otes
Total: 1				
Add Clie * Effective I 2019/07/3 * Message	nt Warning From: To: 0			Apply
Sensitiv	ve Record			Client Warning = "Sensitive Record – see notes"
Safety (Concern for C	lient		Client Warning = "Safety Concern for Client – see notes"
Safety (Concern for S	taff		Client Warning = "Safety Concern for Staff – see notes"

Detential Durlicate Decard	
Potential Duplicate Record	Client Warning on Duplicate Record:
	a) Effective From Date = current date
	b) Message = Potential Duplicate: See Master
	Record Panorama ID xxxxx
	Client Wayning on Master Decords
	Client warning on Master Record:
	a) Effective From Date = current date
	b) Message = Potential Duplicate: This is the
	Master Record Panorama ID xxxxx is a
	potential duplicate)
Communicable Disease Alert: Hep B	
	Client Warning = "Communicable Disease Alert
	Neonatal Hep B Program - see notes"
Communicable Disease Alert: Potential Vertical	For the Client (Mother)
Transmission- to address Postnatal Acquisition	
Event Follow Up	Client Warning = "Communicable Disease Alert
	Potential Vertical Transmission – see notes"
	Note: Alert would be closed out on Mother's
	record once the information documented on
	Baby record.
Communicable Disease Alert: Post Exposure	Client Warning = "Communicable Disease Alert:
Prophylaxis Serology Recommended – See Notes	Post Exposure Prophylaxis Serology Recommended
	– See Notes"
	Note: Once post-series serology is received
	and entered into Panorama indicating
	immunity, the Client Warning would be expired.
	Client Note to be entered should have the
	following components:
	• Subject: Communicable Disease Alert: Post
	Exposure Prophylaxis
	• Note Type: Role (who is entering)
	• Note: Serology to be completed (x) month(s) nost
	(vvv) series completion

Encounters

Panorama automatically creates an encounter for immunizations. You can add notes to these encounters. You can also create an encounter manually.

Encounters in Panorama are used when you interact with a client for an office/home visit, telephone or hospital visit

You can create a separate encounter to document a phone call or visit regarding immunization that did not include administration of an immunization.

	er Group			
Jnassociated Enco	ounters (Non-Ir	vestigation)		
encounter(s) total			Click End	counter Date for encounter
leve Colected Encounter/			citor Line	sound bate for encounter
Insesociated Non-Enjande Fr	ncountere v	10		
onassociated Non-Episode El	incoditional V			
Ion-Episode Encounters				Create Encounter
Encounter Date	Encounter Type	Encounter Reasons	Organization	Location
2019 May 16	Special	-	Panorama	Administrator SDL
	Considerations			
2019 May 10	Administer Immunizations		First Nation Health Authority	Tsay Keh Dene Nursing Station
ncounter Details				A Hide Enc
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Required field counter Group: Immunizat Encounter Date: 2019 yyyy uration (minutes): Encounter Type: Administr counter Reasons: Hold Ct vailable Encounter Reason duit any Childhood ifuenza/Pneumo indergarten ichool Age ravel (YK Only) Responsible Organization :pecify on Organization :pecify or Organization :pecify	ion / [07] / [30] mm dd er immunizations rl and then click to sele ns: :: Three Corners Health lick on the 'Find' button. (C/Yukon > BC > Aborigi	Ct multiple items. Ct multiple items. Services Society Then search, or type the name of the Organ inal Heath Organizations > [Three Co	lected Encounter Reasons: itation you with to specify, select it of mers Health Services Society)	and click on 'Select' button. I

Adding a note to an automatically created encounter

1. Choose **Subject Summary** from Left Hand Navigation under Immunizations

Click Left Hand Navigation (LHN) < Immunizations < Subject Summary

- 2. Encounters will be listed per subject group.
- To view encounters related to Immunizations, scroll to Immunization Encounter Group Select the <u>hyperlink</u> <u>date</u> to go to the details of the encounter. You will be directed to the Encounter Details page.
- 4. At the bottom Encounter Notes section, the first section is a search area. Move lower and choose **Author Note**
- 5. There is a message that you are creating a note for that immunization encounter.
- 6. Complete the note as usual.

Creating an immunization encounter manually

- 7. Have client in context in the Immunization Module
- 8. Choose **Subject Summary** from Left Hand Navigation under Immunization

Click Left Hand Navigation (LHN) < Immunizations < Subject Summary

- 9. You will be taken to the Subject Summary page.
- 10. Choose Create Encounter
- 11. The date will default to today's date.
- 12. Enter the **Duration** (Optional)
- 13. Choose **Encounter Type** from Drop-down

14. Ensure Responsible Organization and Location are correct.

15. **SAVE**

- 16. When page refreshes, scroll down to the **Encounter Notes** area.
- 17. Remember the top section is a search. Choose **Author Note**.
- 18. Create and save your note as per usual
- 19. Choose Note Complete