First Nations Health Authority
Health through wellness

Panorama Guide

Immunization Data Entry

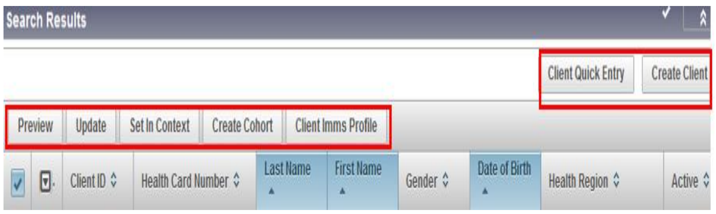
Version 3.2

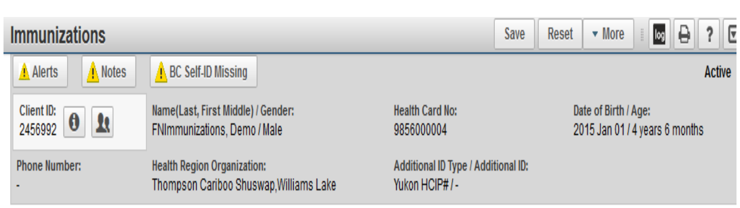
panorama@fnha.ca

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

Table of Contents

Selecting Clients - Opening Client Records





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*
   - *Update*
   - *Set in Context*
   - *Create Cohort*
   - *Client Imms Profile*
   - *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:

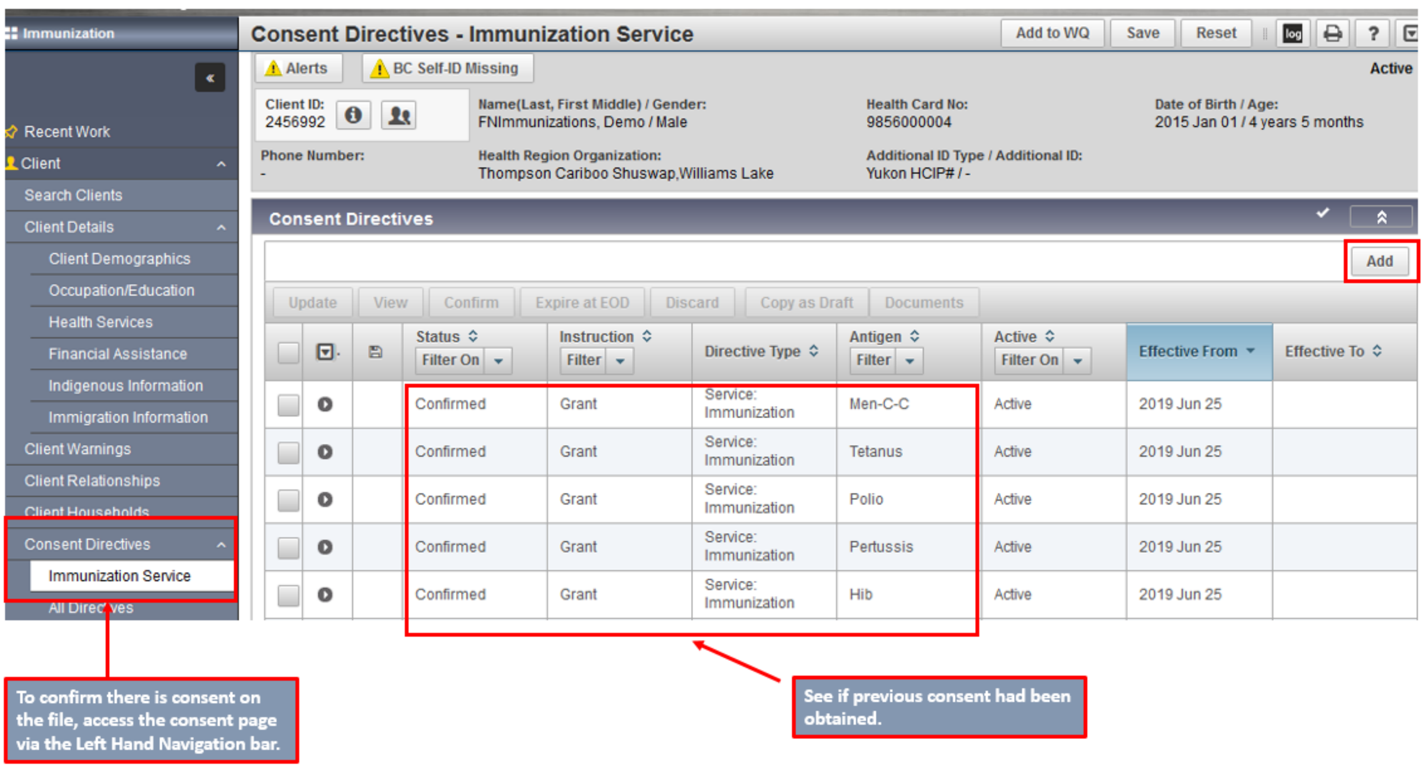
6. Ensure Client Header is set to correct client in context.
7. Make sure that you have updated: **Client Details (See Core User Guide)**
   - Client Demographics
   - Indigenous Information
   - Allergies
   - Risk Factors

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.

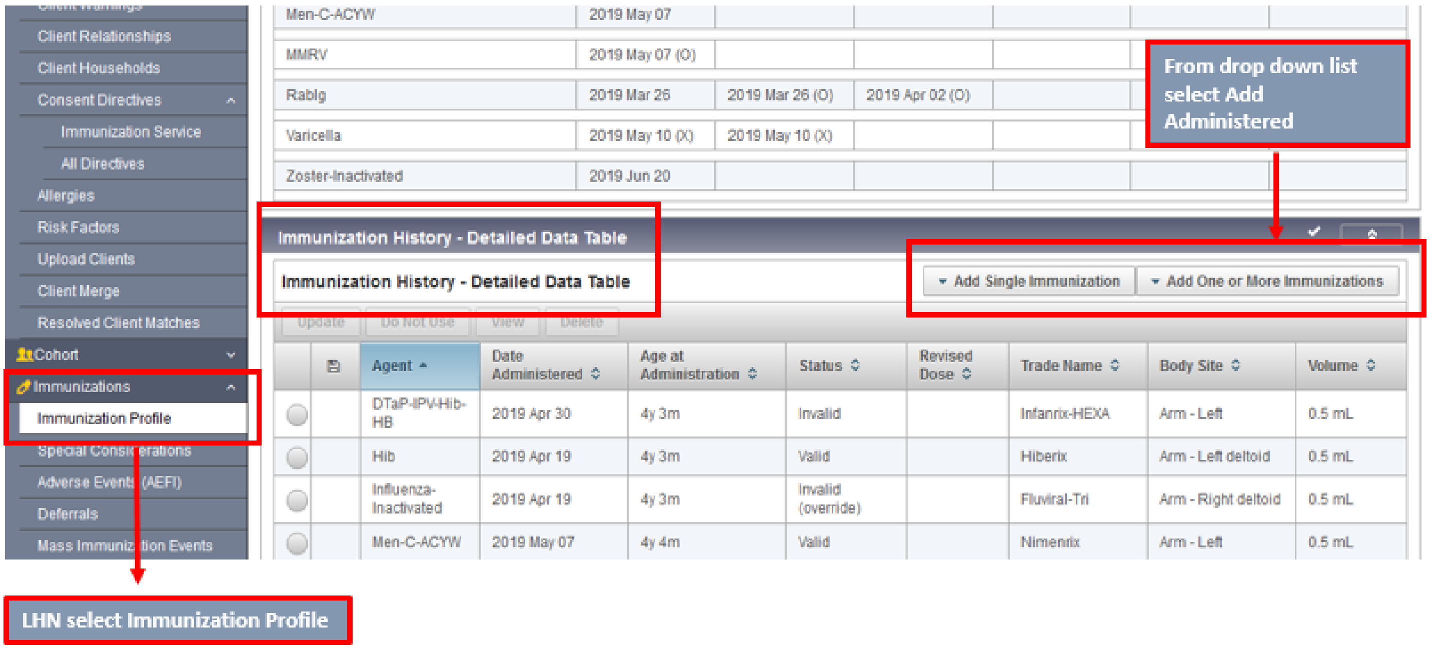
You can also enter consent through the Immunization profile.

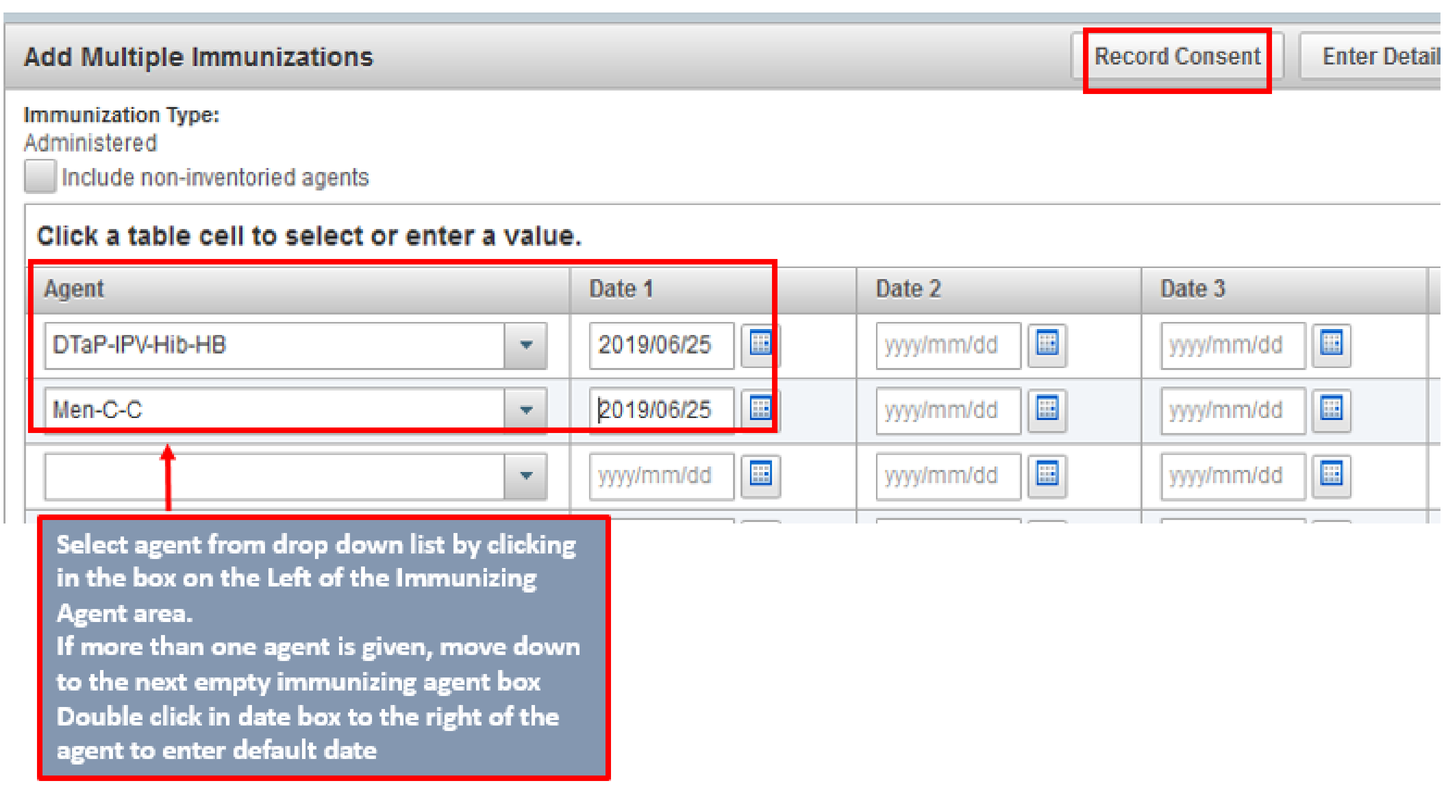


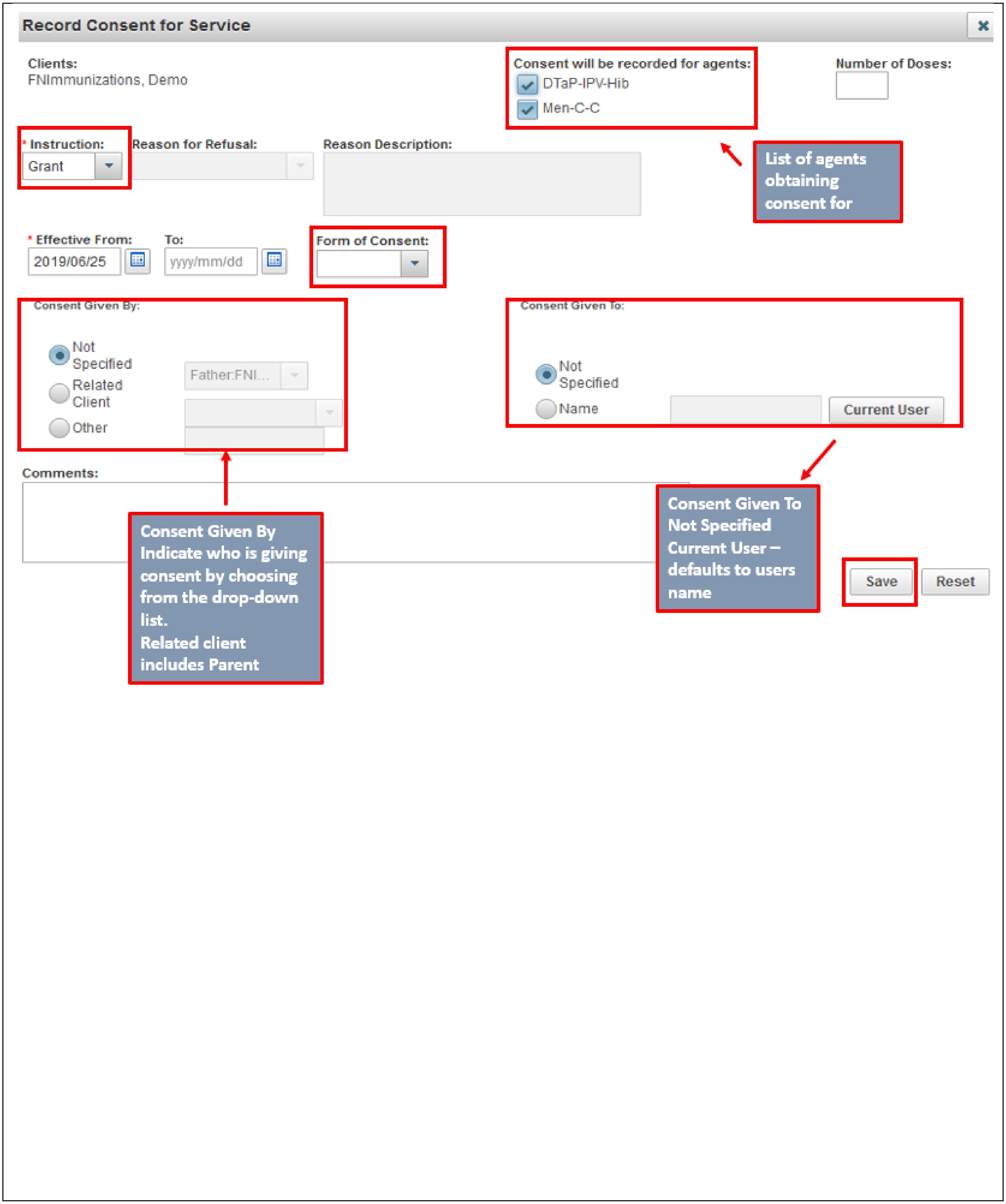
Entering Consent from IMMUNIZATION PROFILE page

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


Client Relationships
Client Households
Consent Directives
Immunization Service
All Directives
Allergies
Risk Factors
Upload Clients
Client Merge
Resolved Client Matches
Cohort
Immunizations
Immunization Profile
Special Considerations
Adverse Events (AEFI)
Deferrals
Mass Immunization Events
Men-C-ACYW 2019 May 07
MMRV 2019 May 07 (O)
RabIg 2019 Mar 26 2019 Mar 26 (O) 2019 Apr 02 (O)
Varicella 2019 May 10 (X) 2019 May 10 (X)
Zoster-Inactivated 2019 Jun 20
From drop down list select Add Administered
Immunization History - Detailed Data Table
Add Single Immunization
Add One or More Immunizations
Update
Do Not Use
View
Delete
Agent
Date Administered
Age at Administration
Status
Revised Dose
Trade Name
Body Site
Volume
DTaP-IPV-Hib-HB 2019 Apr 30 4y 3m Invalid Infanrix-HEXA Arm - Left 0.5 mL
Hib 2019 Apr 19 4y 3m Valid Hiberix Arm - Left deltoid 0.5 mL
Influenza-Inactivated 2019 Apr 19 4y 3m Invalid (override) Fluviral-Tri Arm - Right deltoid 0.5 mL
Men-C-ACYW 2019 May 07 4y 4m Valid Nimenrix Arm - Left 0.5 mL
LHN select Immunization Profile


Add Multiple Immunizations
Record Consent
Enter Detail
Immunization Type:
Administered
Include non-inventoried agents
Click a table cell to select or enter a value.
Agent
Date 1
Date 2
Date 3
DTaP-IPV-Hib-HB 2019/06/25 yyyy/mm/dd yyyy/mm/dd
Men-C-C 2019/06/25 yyyy/mm/dd yyyy/mm/dd
yyyy/mm/dd yyyy/mm/dd yyyy/mm/dd
Select agent from drop down list by clicking in the box on the Left of the Immunizing Agent area.
If more than one agent is given, move down to the next empty immunizing agent box
Double click in date box to the right of the agent to enter default date

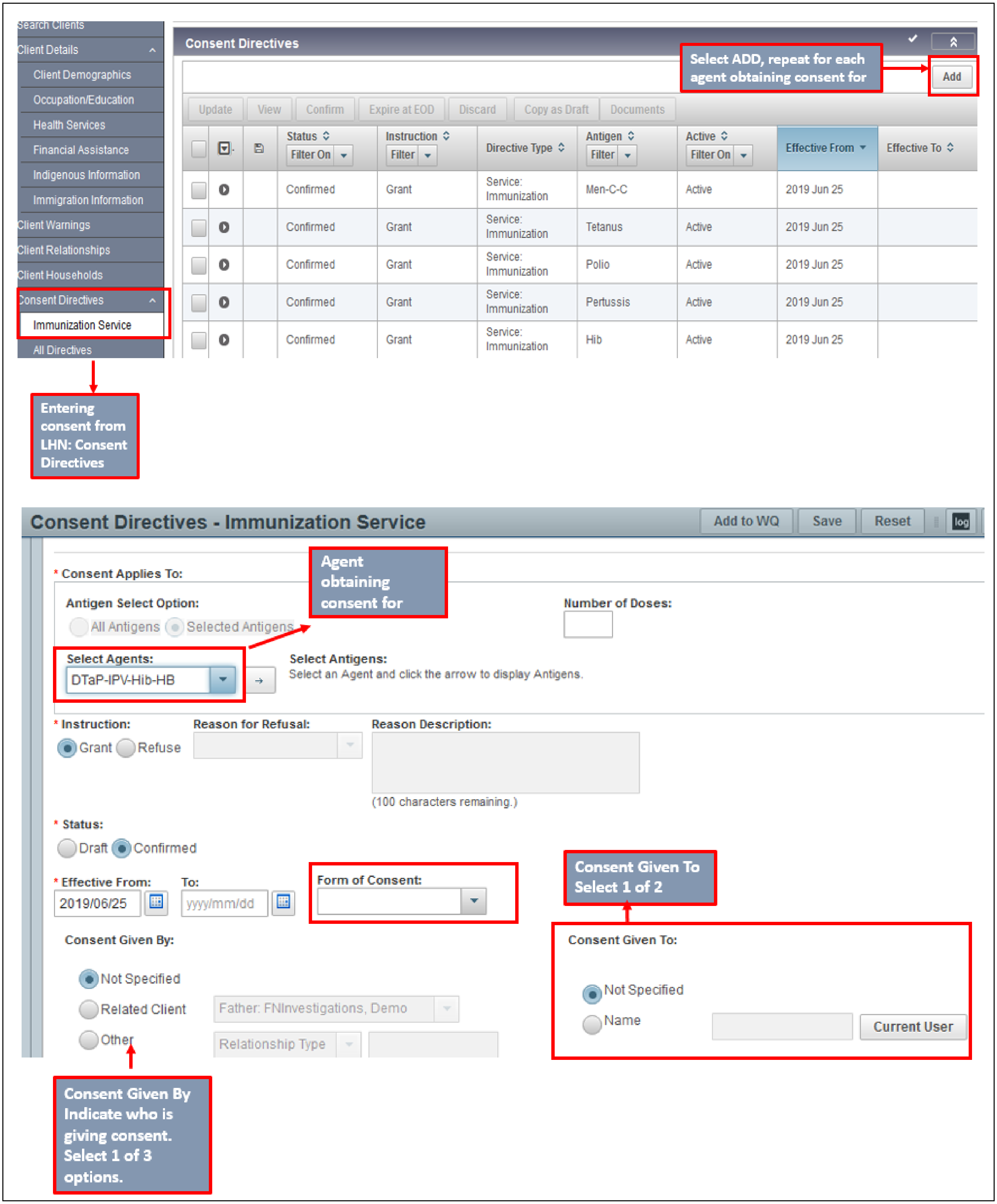

Record Consent for Service
Clients:
FNImmunizations, Demo
Consent will be recorded for agents:
DTaP-IPV-Hib
Men-C-C
Number of Doses:
List of agents obtaining consent for
* Instruction:
Grant
Reason for Refusal:
Reason Description:
* Effective From:
2019/06/25
To:
yyyy/mm/dd
Form of Consent:
Consent Given By:
Not Specified
Related Client
Other
Father:FNI...
Consent Given To:
Not Specified
Name
Current User
Comments:
Consent Given By
Indicate who is giving consent by choosing from the drop-down list.
Related client includes Parent
Consent Given To
Not Specified
Current User – defaults to users name
Save
Reset

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**

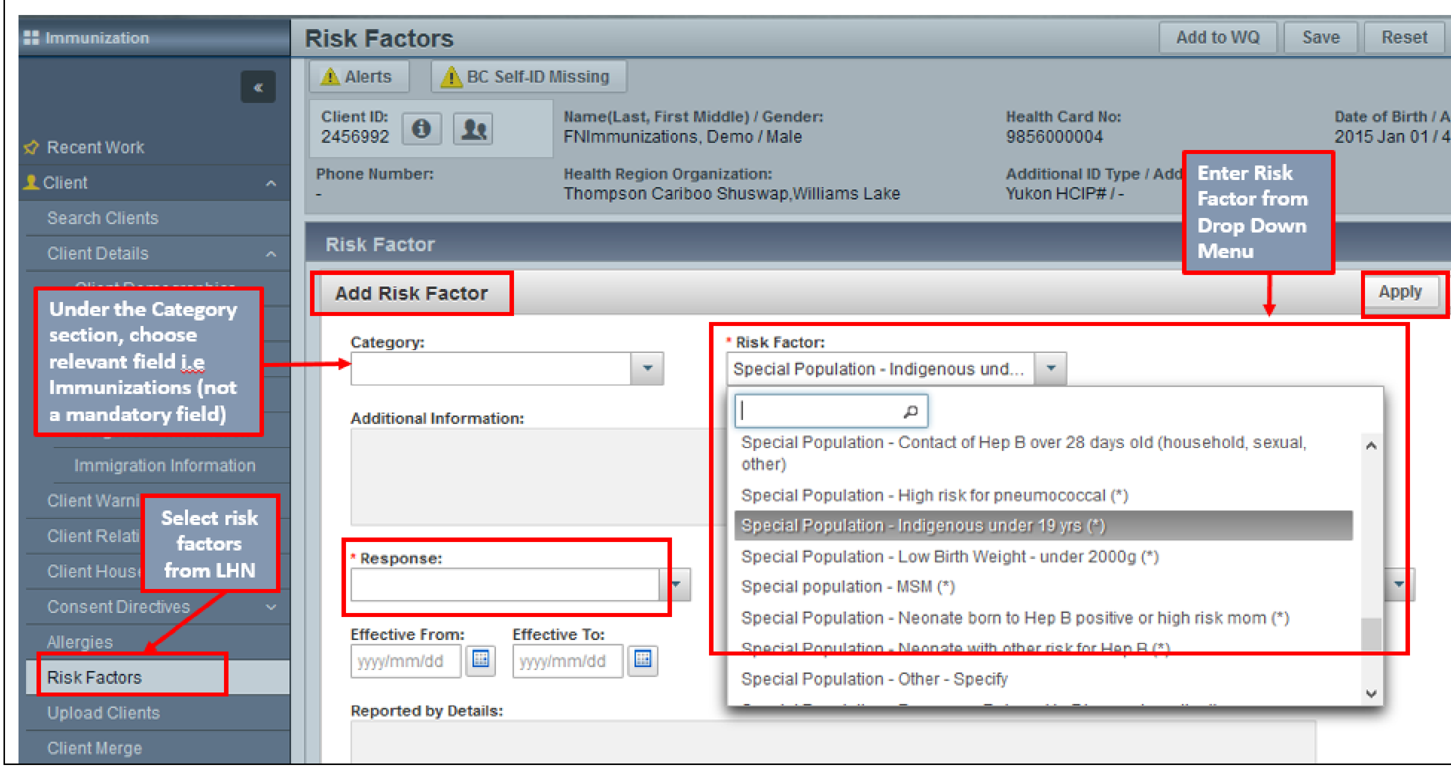

Search Clients
Client Details
Client Demographics
Occupation/Education
Health Services
Financial Assistance
Indigenous Information
Immigration Information
Client Warnings
Client Relationships
Client Households
Consent Directives
Immunization Service
All Directives
Consent Directives
Select ADD, repeat for each agent obtaining consent for
Add
Update
View
Confirm
Expire at EOD
Discard
Copy as Draft
Documents
Status
Instruction
Directive Type
Antigen
Active
Effective From
Effective To
Confirmed Grant Service: Immunization Men-C-C Active 2019 Jun 25
Confirmed Grant Service: Immunization Tetanus Active 2019 Jun 25
Confirmed Grant Service: Immunization Polio Active 2019 Jun 25
Confirmed Grant Service: Immunization Pertussis Active 2019 Jun 25
Confirmed Grant Service: Immunization Hib Active 2019 Jun 25
Entering consent from LHN: Consent Directives
Consent Directives - Immunization Service
Add to WQ
Save
Reset
* Consent Applies To:
Agent obtaining consent for
Antigen Select Option:
All Antigens
Selected Antigens
Number of Doses:
Select Agents:
DTaP-IPV-Hib-HB
Select Antigens:
Select an Agent and click the arrow to display Antigens.
* Instruction:
Grant
Refuse
Reason for Refusal:
Reason Description:
(100 characters remaining.)
* Status:
Draft
Confirmed
* Effective From:
2019/06/25
To:
yyyy/mm/dd
Form of Consent:
Consent Given To Select 1 of 2
Consent Given By:
Not Specified
Related Client
Father: FNInvestigations, Demo
Other
Relationship Type
Consent Given To:
Not Specified
Name
Current User
Consent Given By Indicate who is giving consent. Select 1 of 3 options.

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
6. 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



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.

<u>Immunization Details > Immunization History - Summary Grid</u>
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.

<u>Immunization History - Detailed Data Table</u>
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

<u>Antigen Count</u>
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

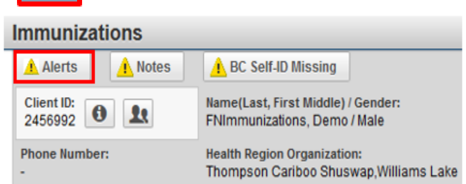
Displays a list of the immunizations that were administered to the client and were determined to be invalid based on the BC and Yukon Immunization Schedule. Immunizations are evaluated using the validation rules within the Panorama Immunization Decision Support Tool (Forecaster) and will be marked invalid 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.

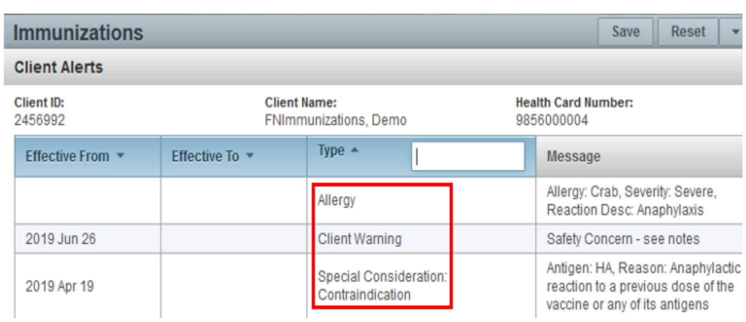
1.

2.

3.

5.





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:

1. Click **Left Hand Navigation (LHN) < Immunizations < Immunization Profile**. The *Client Immunization Profile* screen displays.
2. If Client is displayed in Recent Work, click **LHN > Recent Work > Immunization Summary** hyperlink below the **Client Name**. The *Client Immunization Profile* screen displays.
3. 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.
4. 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

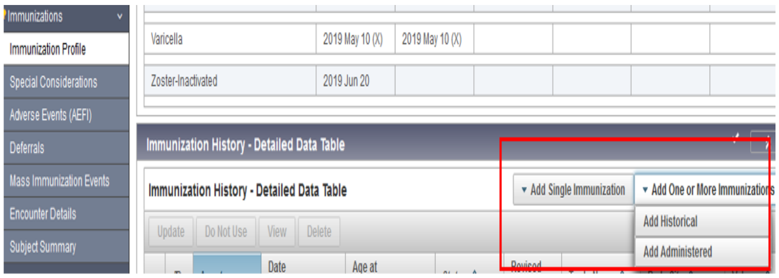
Client > Risk Factors

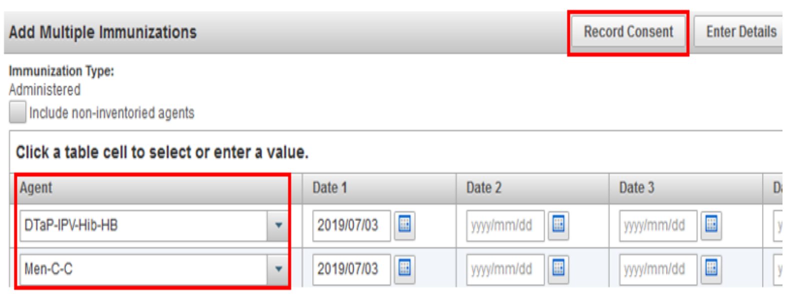
(Note: **Allergies** and **Client Warnings** can be accessed from the **LHN**, as well.)

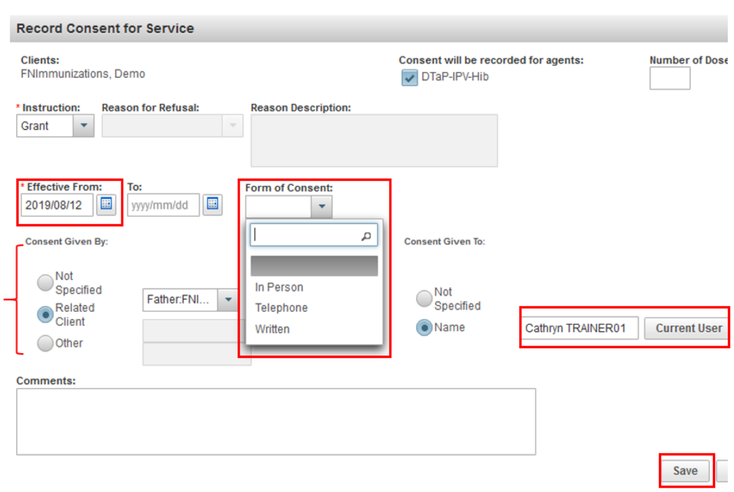
5. In the Client header, look for any **Alerts** and **Notes**.

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

Record Immunizations





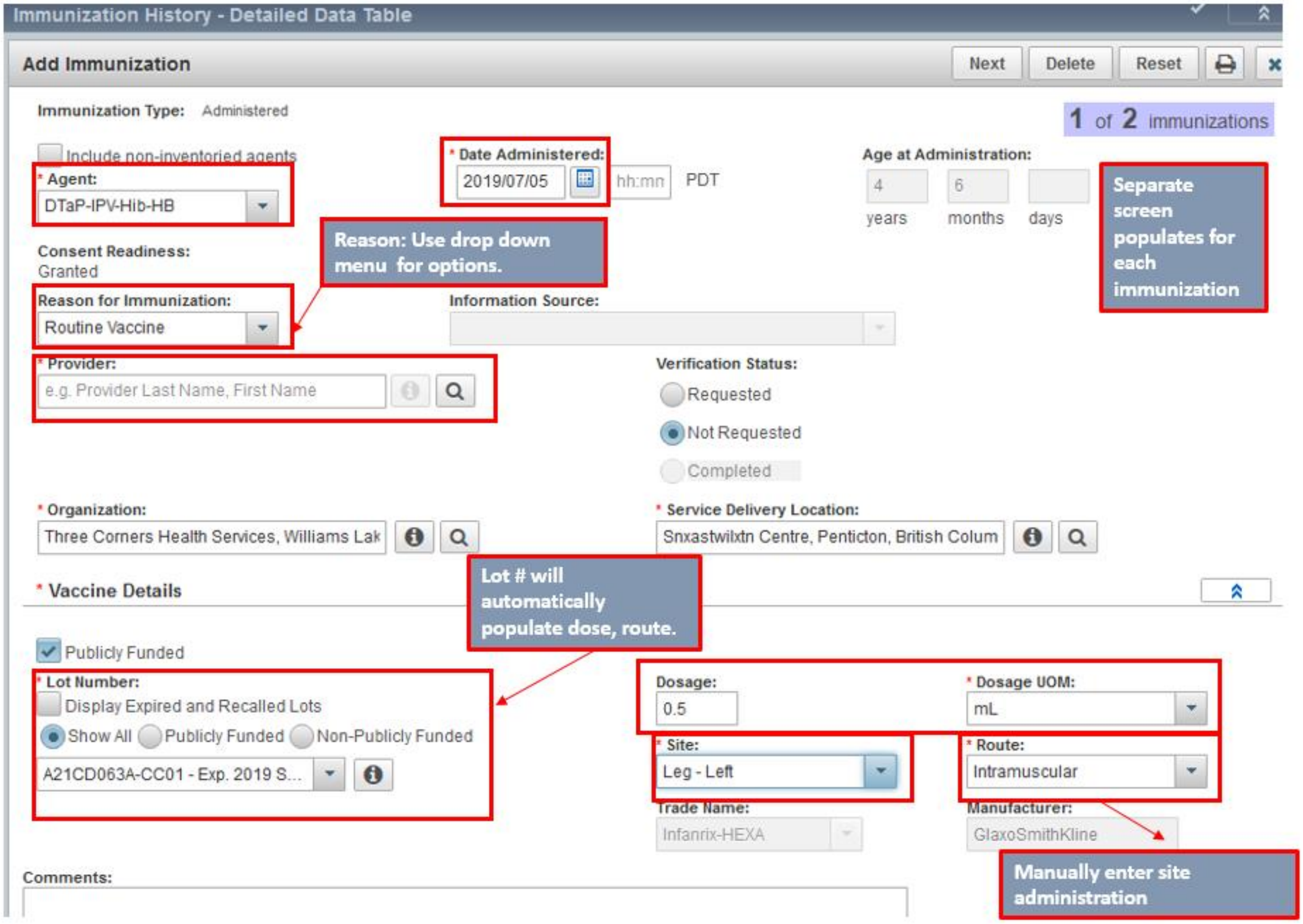


1. Ensure your client is in context. *These instructions assume that consent has been recorded either from the LHN Consent Directives Page or from the Immunization Profile page.*
2. **Left Hand Navigation (LHN) < Immunizations < Immunization Profile** Scroll to **Immunization History Detailed Data Table**
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
6. Double click will default to today's date. Enter date of immunization administration.
7. 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**
9. 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.

NOTE: Defaults will be present for org/SDL

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.

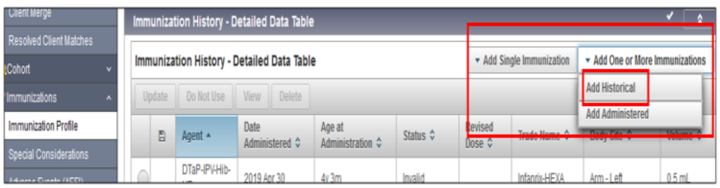

Immunization History - Detailed Data Table
Add Immunization
Next
Delete
Reset
Immunization Type: Administered
1 of 2 immunizations
Include non-inventoried agents
* Agent:
DTaP-IPV-Hib-HB
* Date Administered:
2019/07/05
hh:mm
PDT
Age at Administration:
4 years 6 months days
Separate screen populates for each immunization
Reason: Use drop down menu for options.
Consent Readiness:
Granted
Reason for Immunization:
Routine Vaccine
Information Source:
* Provider:
e.g. Provider Last Name, First Name
Verification Status:
Requested
Not Requested
Completed
* Organization:
Three Corners Health Services, Williams Lak
* Service Delivery Location:
Snxastwilxtn Centre, Penticton, British Colum
Lot # will automatically populate dose, route.
* Vaccine Details
Publicly Funded
* Lot Number:
Display Expired and Recalled Lots
Show All
Publicly Funded
Non-Publicly Funded
A21CD063A-CC01 - Exp. 2019 S...
Dosage:
0.5
* Dosage UOM:
mL
* Site:
Leg - Left
* Route:
Intramuscular
Trade Name:
Infanrix-HEXA
Manufacturer:
GlaxoSmithKline
Manually enter site administration
Comments:

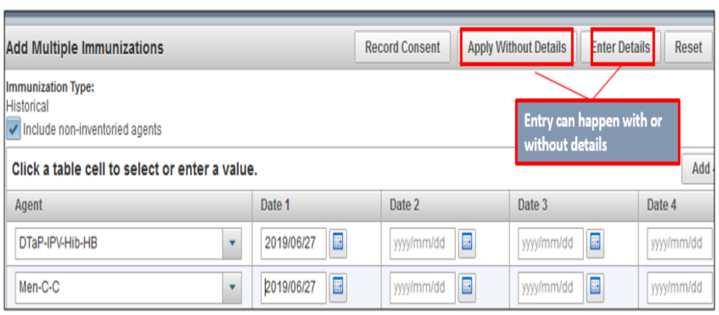
Add Historical Immunizations

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.

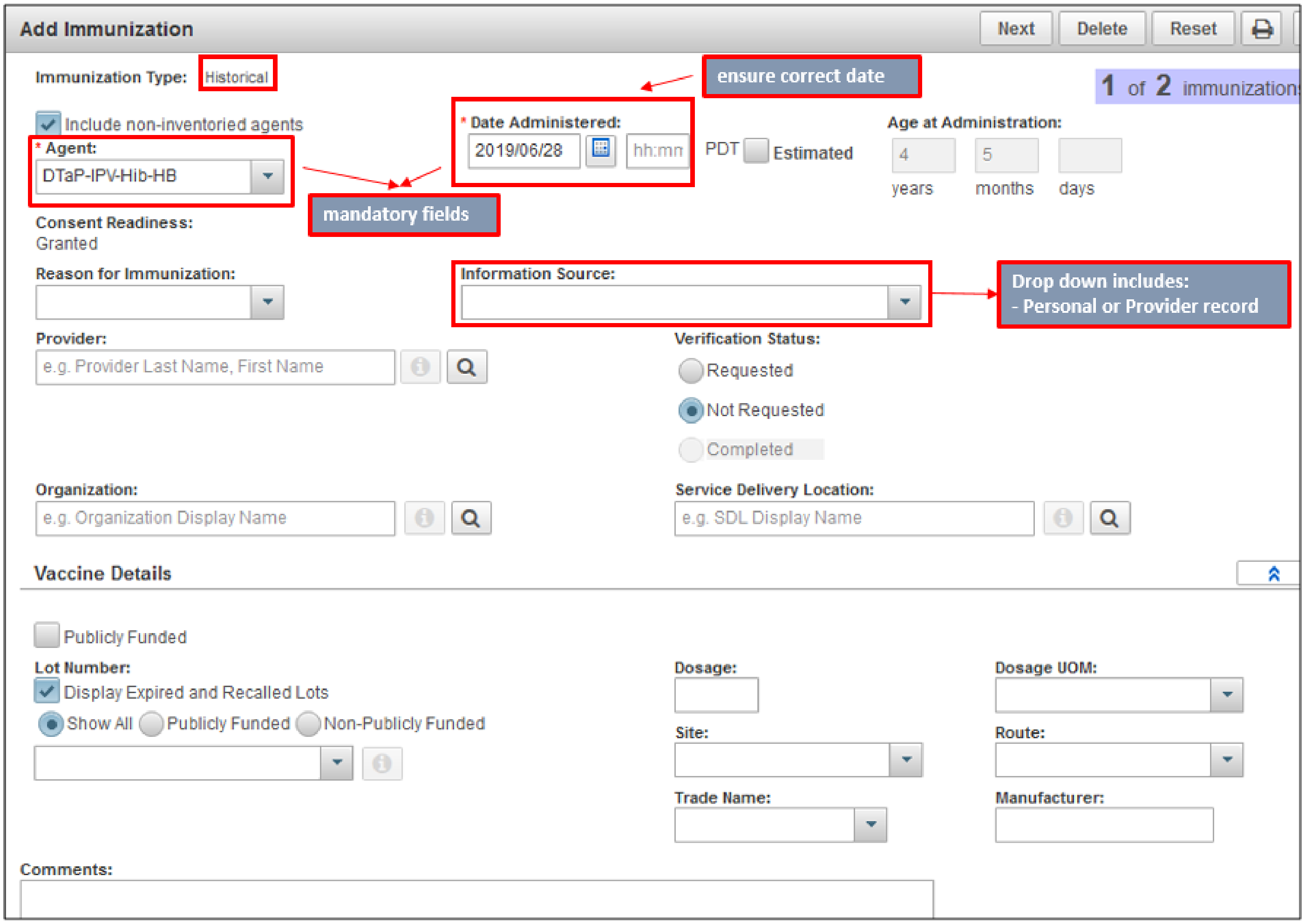
When entering immunization histories, you do not have to enter consent as long as it is captured elsewhere.





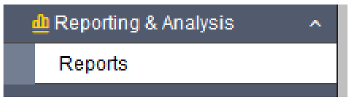
1. Ensure your client is in context in the Immunization module.
2. **Left Hand Navigation (LHN) < Immunizations < Immunization Profile** Scroll to **Immunization History Detailed Data Table**
3. Select **Add Historical** Immunization
4. Choose agent(s) from the drop-down list by clicking in ***Immunizing 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.
12. The verification box would only 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**.

14. Screen will navigate to immunization profile, select **SAVE** to save the immunization documentation.

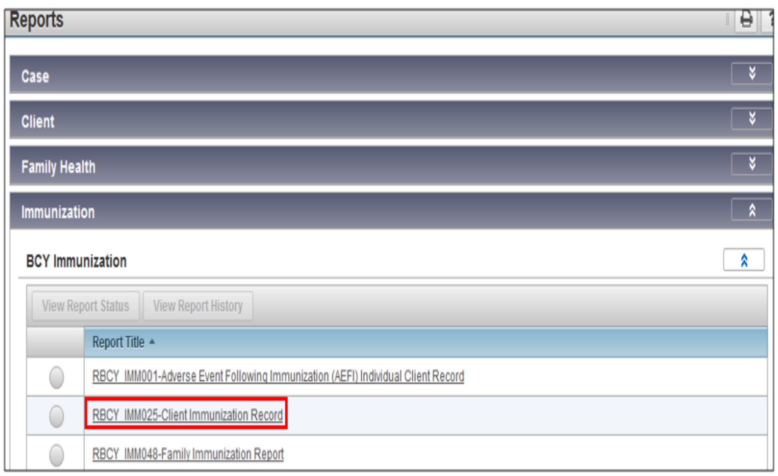


Print Immunization Record

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.

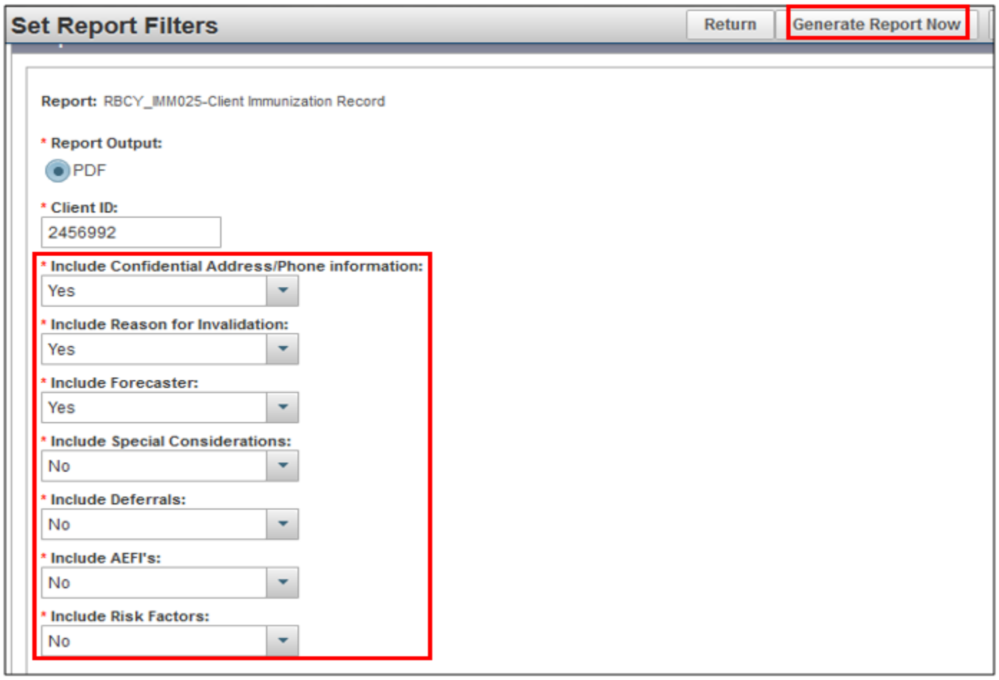


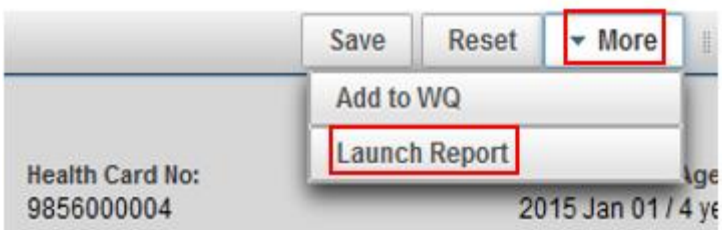
Printing from LHN

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

   Select **Reports**

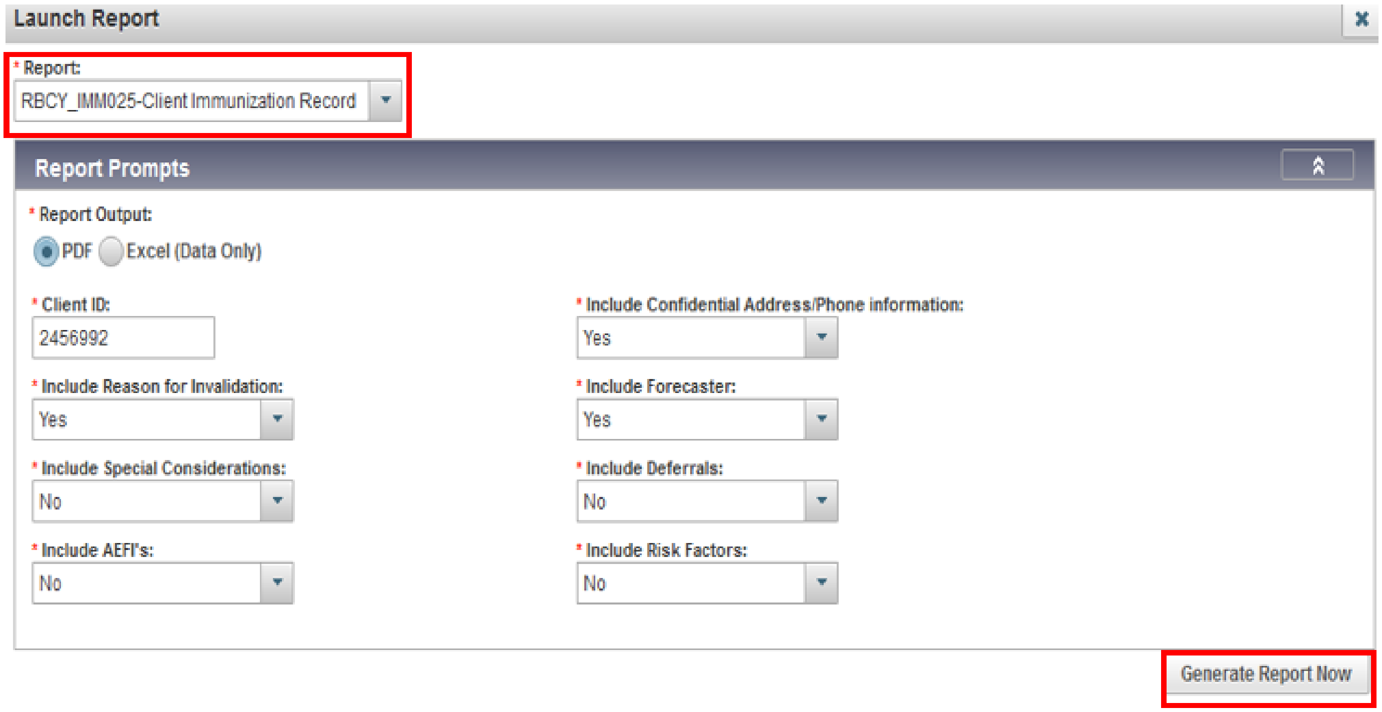
   Left Hand Navigation (LHN) < Reporting & Analysis< Reports
3. Open the Immunization module by selecting the arrows**.**
4. Scroll down to view available reports.
5. Select **IMM025 - Client Immunization Record.** hyperlink
6. **Set Report Filters**. Choose the criteria you wish to have included in the 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.





Printing from Record and Update Immunization page

1. Have the client in context and the Immunization Summary page open.
2. Select **More** from the top right page of client banner Immunization page. Choose **Launch Report.**
3. Scroll to specific report you wish to generate.
4. Select **confirm** tab.
5. **Report 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 PDF**.**
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 upper right corner to close the window.



Deferrals

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

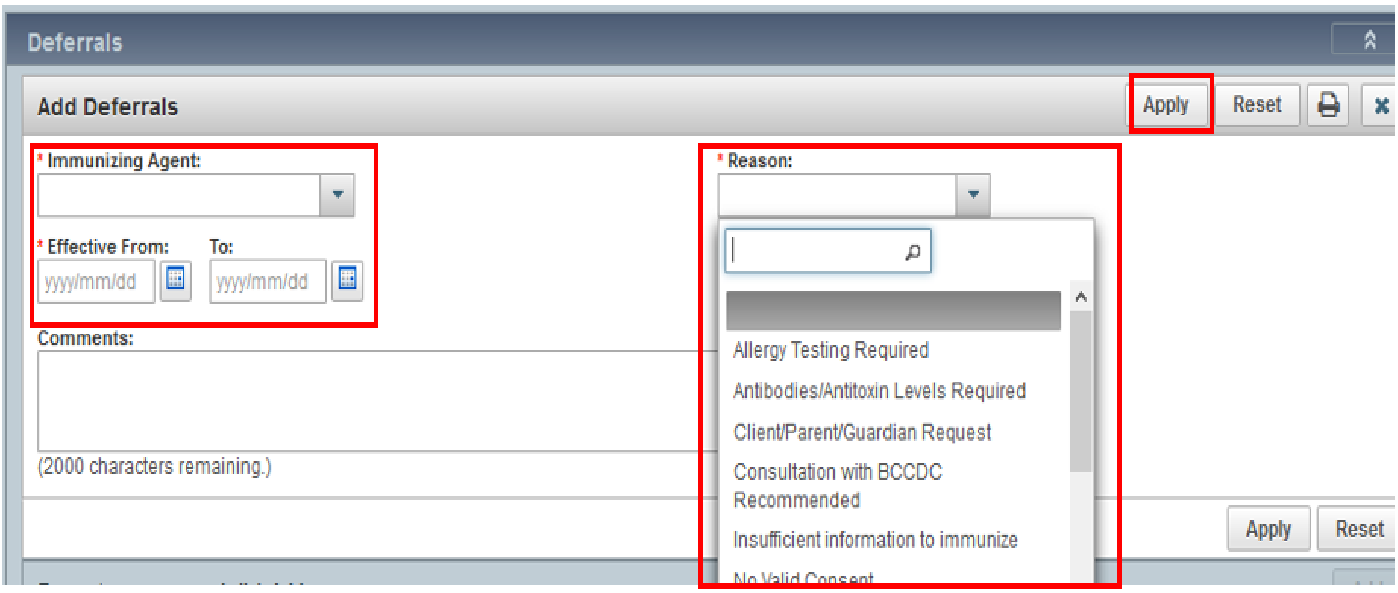
Deferrals may happen when a parent chooses an alternate schedule (limiting the number of shots given at one time) or when a vaccine is not available due to inventory issues.

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
5. 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.

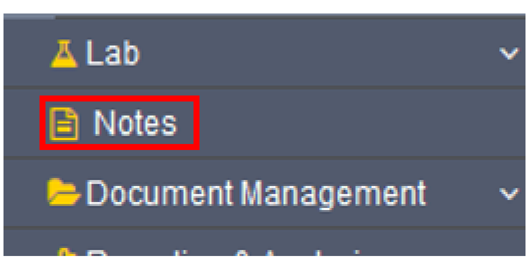
NOTE: Deferrals will not affect the forecaster for the Immunization schedule. Adding **Exemptions** will affect the forecaster

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



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	TB
	Communicable Disease Investigation, excluding TB and STI	CD

[Encounter Group Prefix] – [Note Description]

Eg. FH – Breastfeeding visit with mom and baby

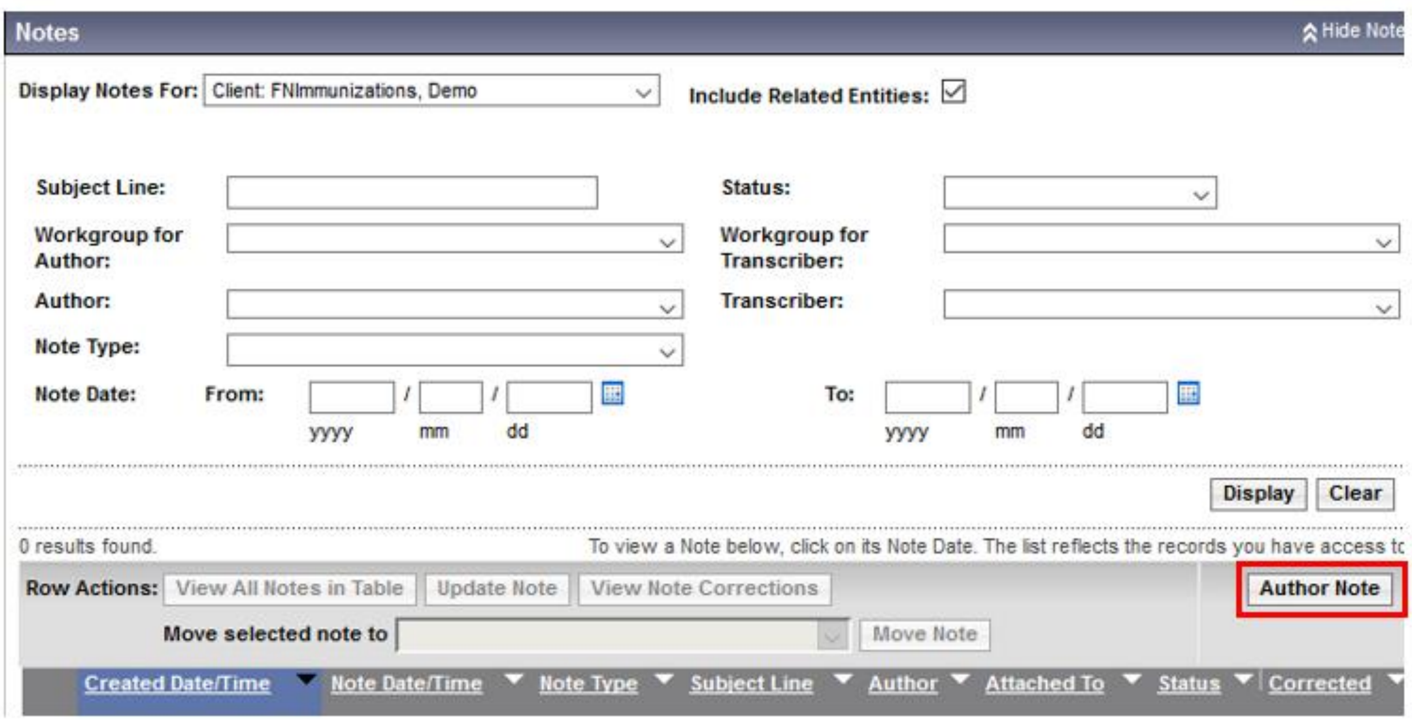
Eg. IMM – 6-Month Immunization

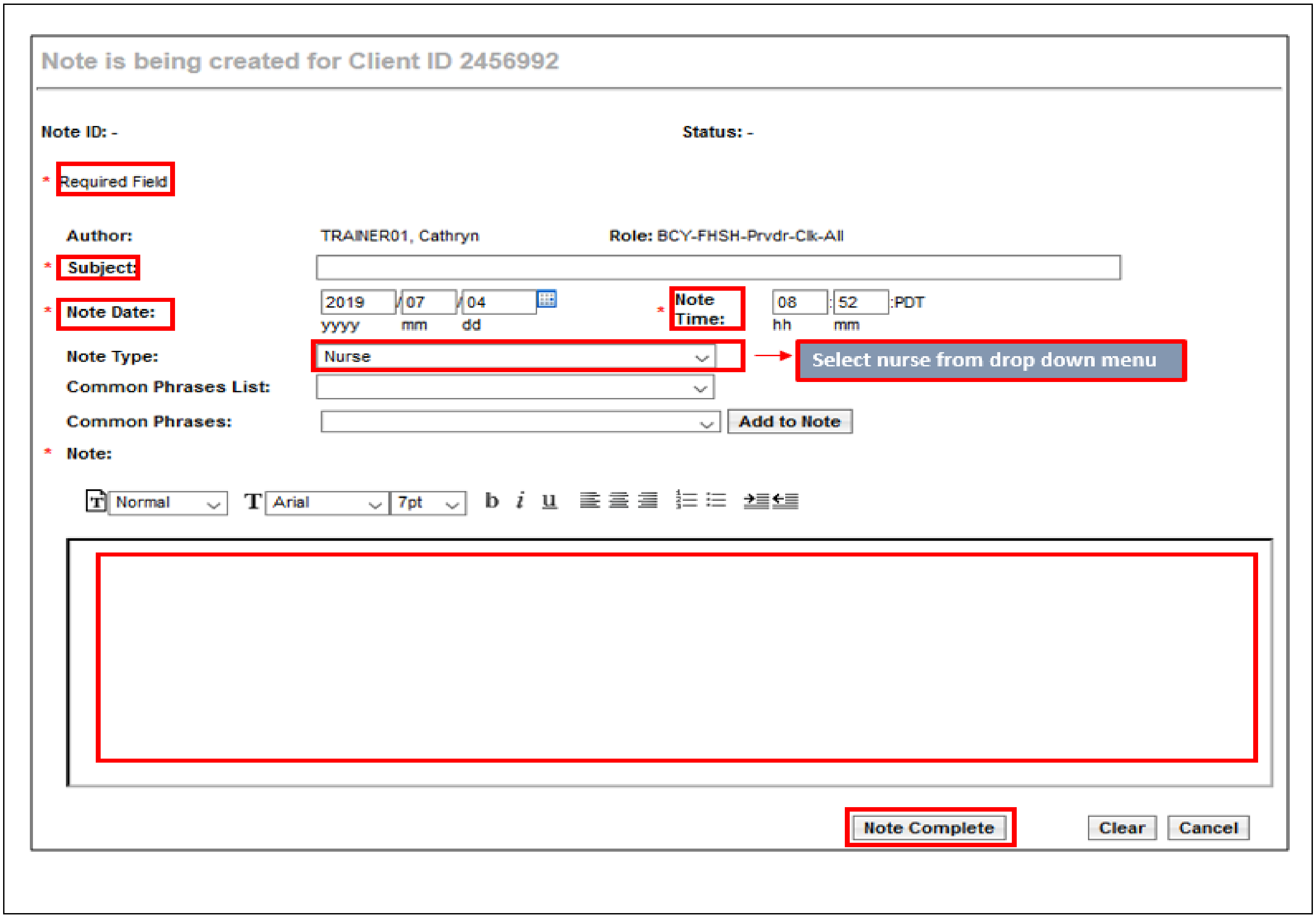
Eg. TB- school screening

4. Complete all required fields ie: **Note Date, Time, Subject**.
5. Choose **Note type** of *Nurse* 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 is optional.
8. Select **Note Complete**

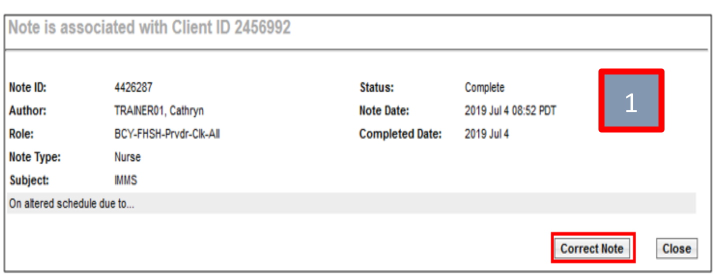
Uploading a document into client notes

** Please see Advanced Checklist-*Uploading a document into Panorama*

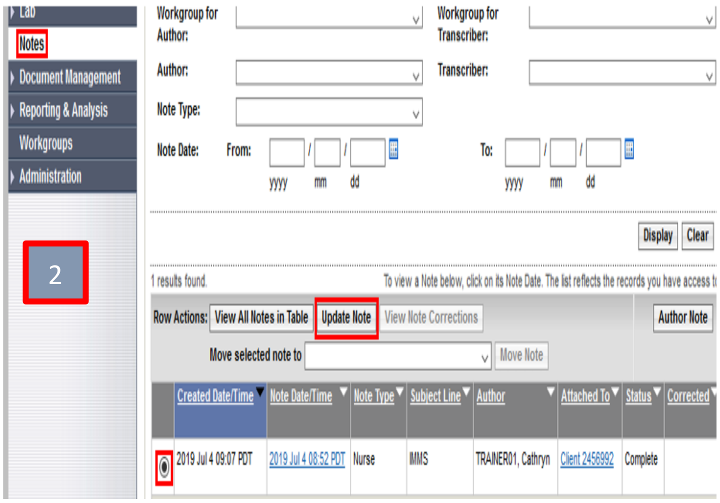




Note Corrections



1. If still on the Notes page, Select **Correct Note.**
2. If you have left the Notes page.
   a. Go to Notes on LHN
   b. Select the note from the table by clicking on the button to the left of the note
   c. 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



will display the original note as well as your newly corrected note.

6. Note that deleted words are crossed out and in red and added words are in green.
7. Select **CLOSE**
8. After closing the note, you should now see a Notes alert in the client header.
9. To view notes, select the hyperlink (blue underlined Notes).

- 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

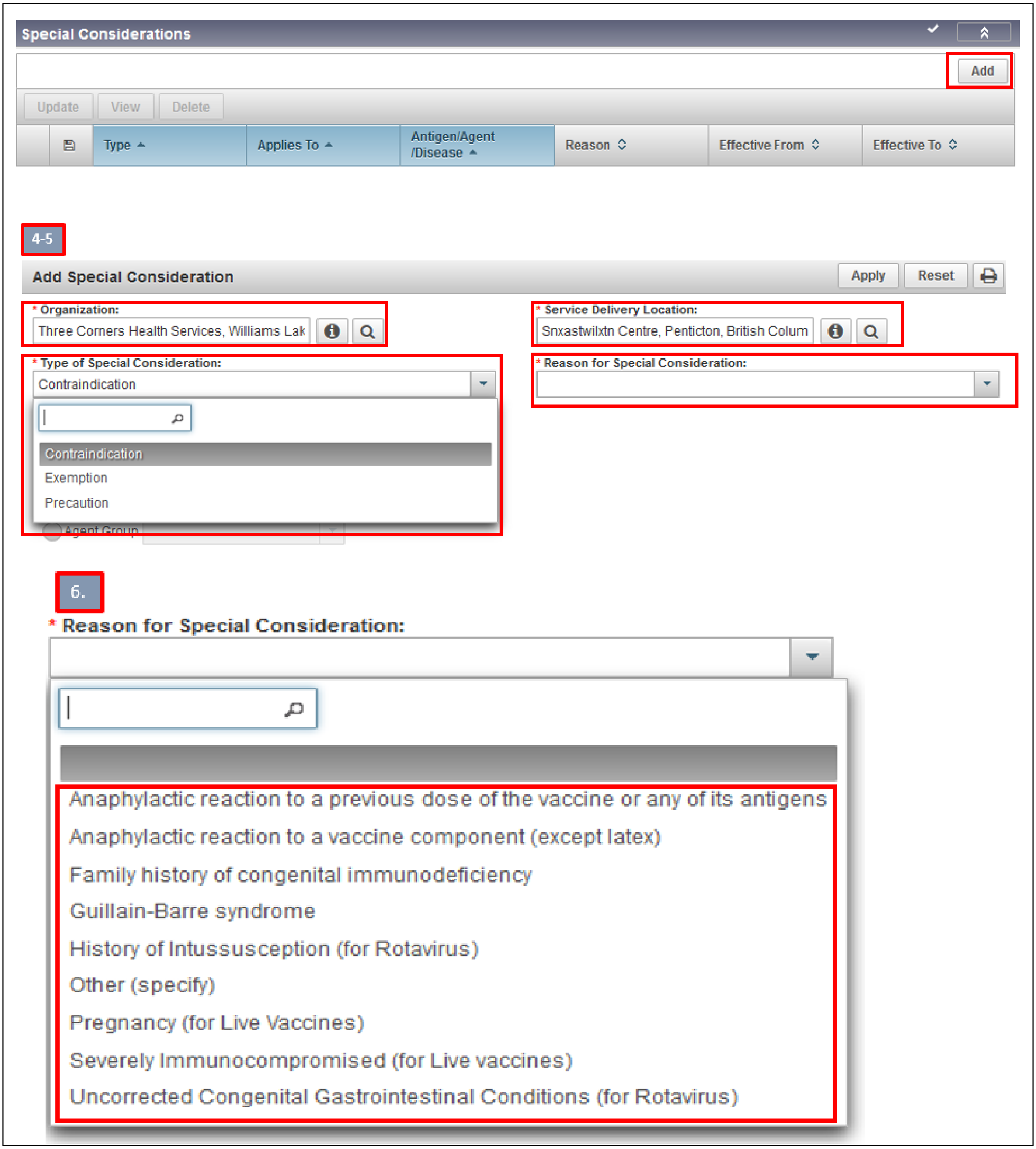
Special Considerations and Refusals (Will create client warning)

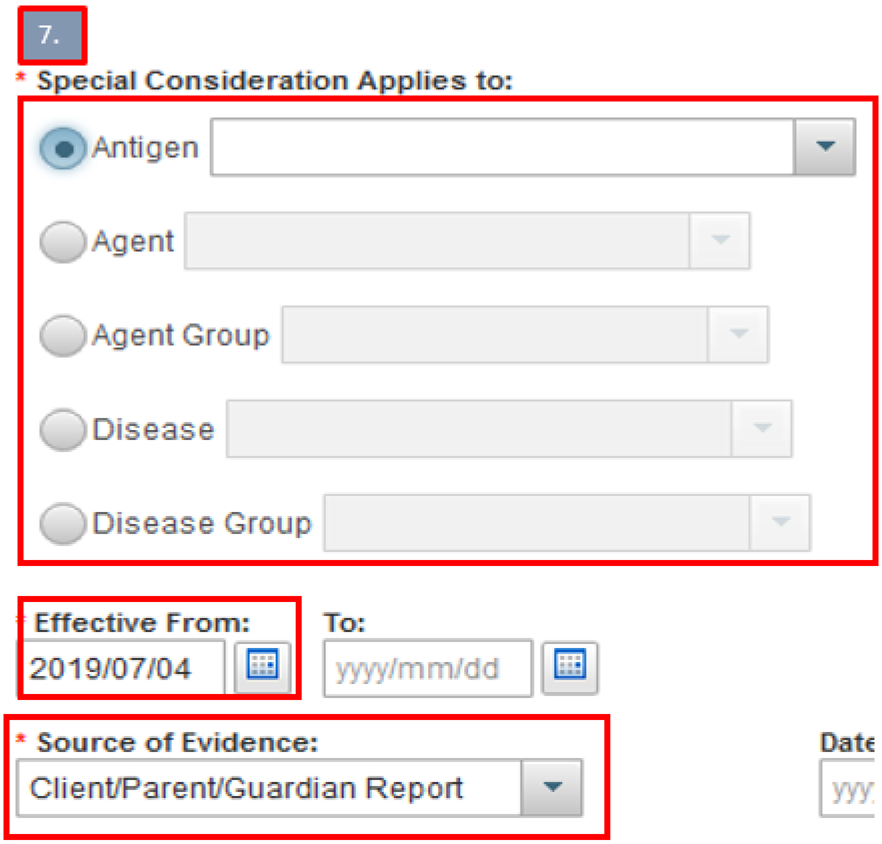
1. Ensure your client is in context
2. Select **Special Considerations** from the LHN

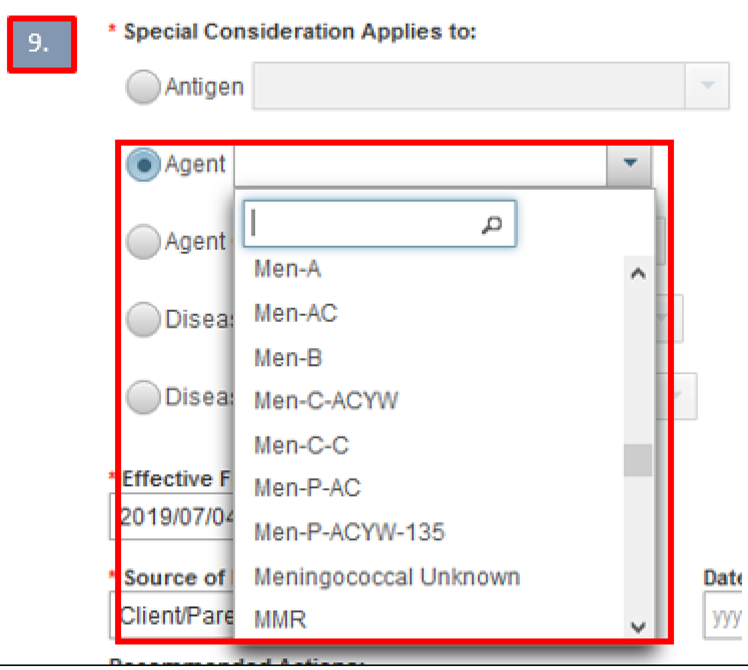
   Left Hand Navigation (LHN) > Immunizations >Special Considerations
3. Select **Add**
4. Ensure your *Organization* and *SDL* are correct. If not, use the **Find** button to select the appropriate locations. Type your SDL slowly, select from drop down list; then push select.
   Note: Your organization 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

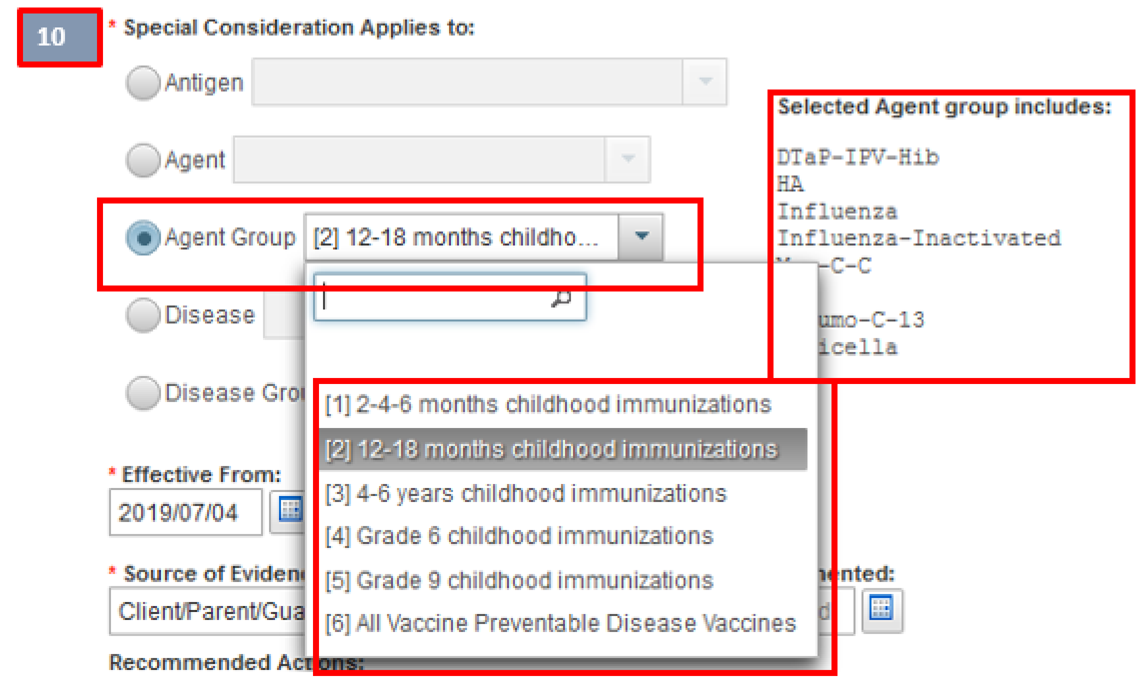
7. Once created, an individual Special Consideration cannot be split into smaller components. There are 5 different ways to enter a Special Consideration:
    1. Selecting an individual **Antigen**
    2. Selecting an **Agent**
    3. Selecting an **Agent Group**
    4. Selecting a **Disease**
    5. 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

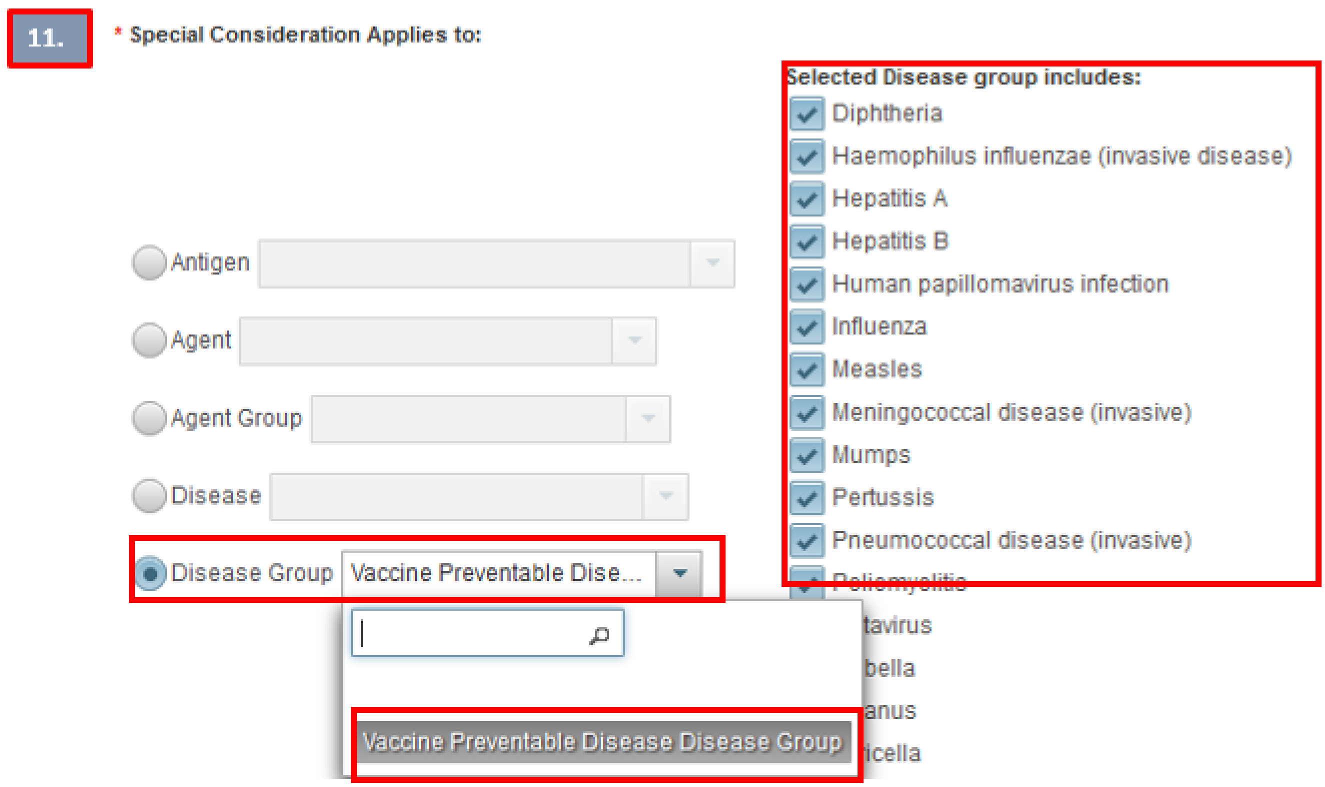
    When applying a Special Consideration to an **Agent Group**, the **Agents** associated with the group are displayed, and a separate Special Consideration will be created for each of these Agents.
11. **Disease Group:** there is one disease group available for selection to apply to a Special Consideration:
    - 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.

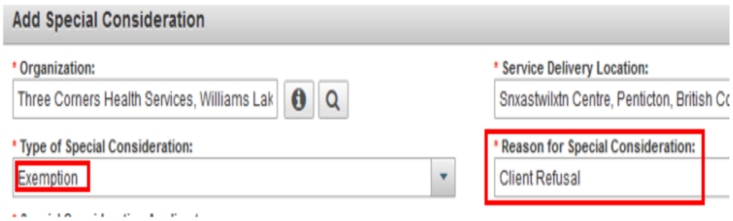

Special Considerations
Add
Update
View
Delete
Type
Applies To
Antigen/Agent /Disease
Reason
Effective From
Effective To
4-5
Add Special Consideration
Apply
Reset
* Organization:
Three Corners Health Services, Williams Lak
* Service Delivery Location:
Snxastwilxtn Centre, Penticton, British Colum
* Type of Special Consideration:
Contraindication
Contraindication
Exemption
Precaution
* Reason for Special Consideration:
6.
* Reason for Special Consideration:
Anaphylactic reaction to a previous dose of the vaccine or any of its antigens
Anaphylactic reaction to a vaccine component (except latex)
Family history of congenital immunodeficiency
Guillain-Barre syndrome
History of Intussusception (for Rotavirus)
Other (specify)
Pregnancy (for Live Vaccines)
Severely Immunocompromised (for Live vaccines)
Uncorrected Congenital Gastrointestinal Conditions (for Rotavirus)


7.
* Special Consideration Applies to:
Antigen
Agent
Agent Group
Disease
Disease Group
Effective From:
2019/07/04
To:
yyyy/mm/dd
* Source of Evidence:
Client/Parent/Guardian Report
Date
yyy


9.
* Special Consideration Applies to:
Antigen
Agent
Agent
Disea
Disea
Men-A
Men-AC
Men-B
Men-C-ACYW
Men-C-C
Men-P-AC
Men-P-ACYW-135
Meningococcal Unknown
MMR
Effective F
2019/07/04
Source of
Client/Pare
Date
yyy


10
* Special Consideration Applies to:
Antigen
Agent
Agent Group
[2] 12-18 months childho...
Disease
Disease Gro
* Effective From:
2019/07/04
* Source of Eviden
Client/Parent/Gua
Recommended Act
ons:
Selected Agent group includes:
DTaP-IPV-Hib
HA
Influenza
Influenza-Inactivated
[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


11.
* 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)
Mumps
Pertussis
Pneumococcal disease (invasive)
Antigen
Agent
Agent Group
Disease
Disease Group
Vaccine Preventable Dise...
Vaccine Preventable Disease Disease Group



Note: **Refusals (BCCDC Immunization manual, Chapter 2 : Immunization Appendix A- Informed Consent for 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
- Child's 4th birthday
- Child's 10th birthday
- Child's 13th birthday

Mature minors should be offered the opportunity to consent for themselves regardless of previous parental/guardian refusal.

Note: Influenza vaccine should be offered annually, regardless of previous refusal.

Vaccine Refusals

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**

End Dating Refusals Background:

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

Documentation

- When a refusal is documented in 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	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 Exemption must be inactivated prior to the next milestone
- 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. These birthdays are the 2nd, 4th, 10th or 13th birthday
- 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 end-dated 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 end-date of the existing Exemption to

	yesterday’s date and enter a new Exemption for the new milestone date

Client Alerts

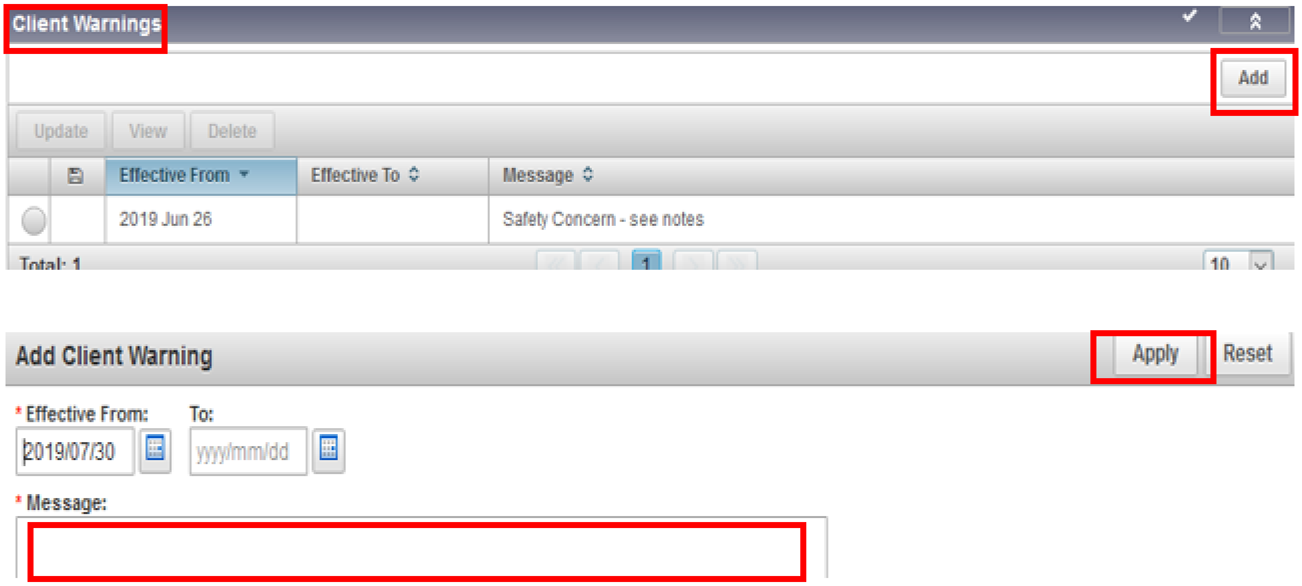
Client alerts will be automatically created by the system, such as when a contraindication, exemption, allergy and or client warning is entered.

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 back-dated.
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.



Sensitive Record	Client Warning = "Sensitive Record – see notes"
Safety Concern for Client	Client Warning = "Safety Concern for Client – see notes"
Safety Concern for Staff	Client Warning = "Safety Concern for Staff – see notes"

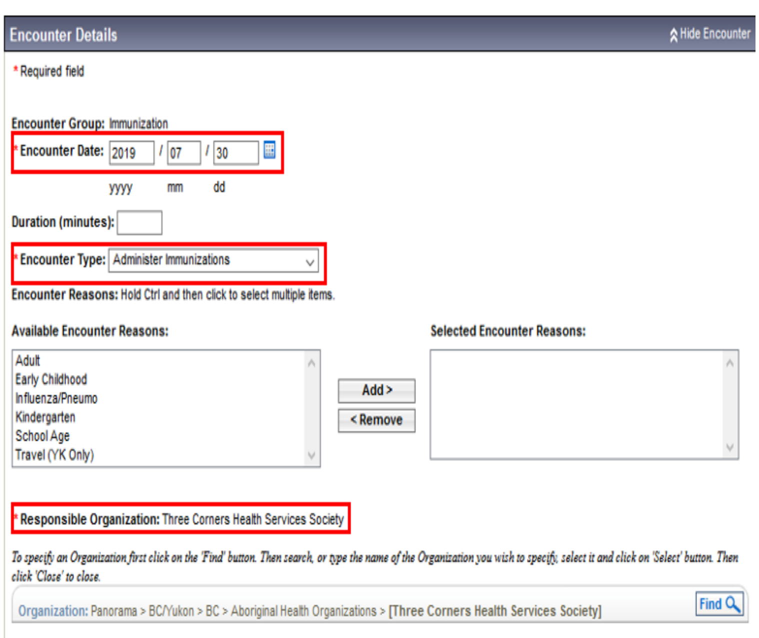
Potential Duplicate Record	**Client Warning on Duplicate Record:** **a)** Effective From Date = current date **b)** Message = Potential Duplicate: See Master Record Panorama ID xxxxx **Client Warning on Master Record:** **a)** Effective From Date = current date **b)** Message = Potential Duplicate: This 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 Transmission- to address Postnatal Acquisition Event Follow Up	For the Client (Mother) 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 Prophylaxis Serology Recommended – See Notes*	Client Warning = "Communicable Disease Alert: 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) post (xxx) 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.



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.
3. To view encounters related to Immunizations, scroll to **Immunization Encounter Group** Select the hyperlink date 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**