PANORAMA

PAN-CANADIAN PUBLIC HEALTH COMMUNICABLE DISEASE SURVEILLANCE AND MANAGEMENT PROJECT

PROJET PANCANADIEN DE SURVEILLANCE ET DE GESTION DE LA SANTÉ PUBLIQUE EN MATIÈRE DE MALADIES TRANSMISSIBLES

IMMS REPORT: CLIENT LIST BY JURISDICTION, SERVICE DELIVERY LOCATION OR SCHOOL

IMMUNIZATION
TRAINING
REPORTING

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REVISION HISTORY

Version	Date Issued	Revision
R2.1_v0.1	2009 Dec 4	V5.1 baseline dated 2009 Feb 20 migrated to DRDD gold template
R2.1_v0.2	2010 Jan 7	Updates based on feedback obtained during a working session 2009 Dec 10 and DCL 412. Renamed report. Minor updates throughout for readability, clarity and purpose. Removed all previous business rules as were either incorrect or were duplicated in execution rules of data tables. Added new set of business rules. Updated data sheet and prototype to reflect new business rules. Formatting fix of footer page numbers as per QA checklist.
R2.1_v0.2b	2010 Jan 15	Revise date term; update version # & date in cover page and footers; standardize labels

Version	Date Issued	Revision
R2.1_v0.3	2010 Jan 21	Section 1.3 Removed Data Access Scope Filtering Section 1.9.2 Changed Page Size to Legal Section 1.12 Removed requirements to display the most recent school number by created date. An application defect will be raised to prevent entry of multiple school numbers for same school. Concatenated name fields and combined into one column to better utilize horizontal space in PDF output format. Section 1.14 Updated report prototype with concatenated name columns and noted that column labels are left justified for this report. The standard is centered.
R2.1_v0.4	2010 Jan 22	PMO approves all revisions and content. Increment Posting to QA Review.
R2.1_v0.5	2010 Jan 27	A number of columns are missing from the tables in both section 1.11 Filters and section 1.12 Data. Please refer to the DRDD template located at: https://hlth004.gov.bc.ca/PCHS_PMO/team/Shared%20Documents/Templates/DRDD%20template.doc
R2.1_v0.6	2010 Feb 11	Submitted updated DRDD template used for this document. Updated Section 1.2 Legend with new template text for Static Text column.
R2.1_v0.7	2010 Mar 2	PMO approves all revisions and content. Increment Posting to QA Review.
R2.1_v0.8	2010 Mar 2	PMO QA reviewed. This DDUC is being recommended for PMO approval.
R2.1_v1.0	2010 Mar 2	Approved Product Development Manager, Panorama Management Office. Incrementing version number to next whole number.
R2.3_v1.0	2011 Nov 14	Updated disclaimer information

SUPPORTING DOCUMENTS

Content from the following list of supporting documents was used or referenced in this document. Please obtain those documents as necessary for details where referenced in this document.

Version	Date Issued	Revision

DOCUMENT CONVENTIONS AND TERMINOLOGY

In Canada, the official name of the application is the Panorama. In other countries, the official name of the application is the IBM Public Health Solution for Disease Surveillance and Management, also referred to Public Health SDSM. Where the terms "application," "System," "Panorama," or "Public Health SDSM" are referenced in this document, they should be interpreted according to the locale in which the system is being used.

The following document conventions have been used in various sections:

- Square brackets ([ ]) indicate a screen, screen section, button or field.

- Double quotation marks (" ") indicate a value.

TABLE OF CONTENTS

1.0 IMMS REPORT: CLIENT LIST BY JURISDICTION, SERVICE DELIVERY LOCATION OR SCHOOL

1.1 PURPOSE

This report will provide client information for the purposes of immunization program planning.

Clients are associated with Jurisdictional Organizations (JOrgs), Service Delivery Locations (SDL) and Schools through their Client Index record. Jurisdictional Organizations (JOrgs) require information on the number of clients, the type of client and their associations within the jurisdiction.

1.2 REPORT NAME

The report name Imms Report: Client List by Jurisdiction, Service Delivery Location or School is specified according to the naming convention described in Appendix E – Report Naming Convention. The Report Name is the generic name in the case where multiple Report Sub-IDs are applicable within this DRDD.

The Report Type Identifier and Report Sub-ID are listed in Table 1 – Report Type Identifier and Table 2 – Report Sub-ID.

Table 1 – Report Type Identifier

√	Report Prefix	Definition
	IR	In DDUC Report is accessible from a function within the application and may be available from the Select Report Type screen under Reporting & Analysis > Standard Reports.
√	R	Report is accessible from the Select Report Type screen only.
	X	Administrative report is accessible from the Select Report Type screen.

The Report Sub ID indicates a variation of data at a high level; for more detailed information refer to the Report Sub-ID in Section 1.11, Filters.

Table 2 – Report Sub-ID

√	Report Sub-ID	Report Name	Description

1.3 SECURITY PERMISSIONS

The user will require the following security permission:

Report Permission		
Function	**Permission Description**	**Permission Name**
The ability to generate and schedule this report	The ability to generate and schedule this report	R6016

The user will require the following consent permissions:

Consent Permission(s)*		
Function	**Permission Description**	**Permission Name**
Override a Client Data Disclosure Consent Directive	Override a Client Data Disclosure Consent Directive	Consent_Override_Disclosure_Client_Data

* Refer to DDUC 11201, Schedule Reports (Section 1.2) for the full list of Consent Permissions.

The following table identifies if the report results are filtered based on the user's current organizational-role Data Access Scope value.

√	**Data Access Scope**
	Results may only include those clients accessible to the user based on their Data Access Scope.

1.4 AD HOC / SCHEDULED REPORT

The following table identifies if the report is either an ad hoc or scheduled report. Some reports can be both ad hoc and scheduled.

√	**Ad Hoc / Scheduled Report**
	Ad-hoc within Detailed Design Use Case (DDUC)
√	Ad-hoc within Reporting & Analysis, Standard Reports
√	Scheduled within Reporting & Analysis, Standard Reports

1.5 ACCESS POINTS

This section shows the navigation steps for accessing the report from within the application.

If the report is an IR report (accessible while the user is performing a function within the application), the DDUC is listed in the table below.

This section indicates where the report can be triggered from within the application.

#	From DDUC Access Point	Screen	Trigger	Business Rules for enabling this Access Point
1	DDUC 11201 Schedule Reports	Select Report Type screen	Clicking on a Report Name	Enabled when user has been granted appropriate permissions

1.6   PRECONDITIONS AND ASSUMPTIONS

1.6.1 PRECONDITIONS

a. No preconditions

1.6.2 ASSUMPTIONS

In addition to the assumptions in DDUC 11201 Schedule Reports, the following assumptions are applicable to this report:

a. For the purposes of this DRDD, the report is run against a replicated copy of the operational database.
b. Applicable consent directives will be applied to affected records and data.
c. There is a mechanism to override any consent directives that may be blocking records that would otherwise appear in a particular instance of a report.
d. Clients may be associated with multiple Service Delivery Locations but only a single Jurisdictional Organization at any given time.
e. Clients transferred during a school year into the School being reported upon, will have had their record revised to reflect updated Effective from and Effective to dates.

1.7   REPORT TYPE

The report category and sub-category are listed in the following table:

Selected Option (√)	
Case	
	Operational Forms and Lists
Immunization	
	Communication Templates
√	Operational Forms and Lists
Index	
	Client
Inventory	
	Operational Forms and Lists
Lab	
	Operational Forms and Lists
	Requisition Labels

Selected Option (√)	
Selected Option (√)	
	Specimen Labels
PHAC	
	Operational Forms and Lists
Work Management	
	Operational Forms and Lists
Security	
	Audit
	Consent
Family Health	
	Assessments
	Birth Event
	Client Profile
	Disconnected Mass Assessment
	Growth Charts
Other (please specify):	
	Other (please specify):

1.8 CLIENT/FIRST NATIONS IDENTIFIABLE CONTENT

This report can display the following type of content:

√	Report Content
Is	
√	Client identifiable*
	Not client identifiable
Is	
	First Nations identifiable*
√	Not First Nations identifiable

*If consent is applicable, ensure consent overrides are identified in Section 1.3, Security Permissions.

1.9 REPORT OUTPUT

The default report display and output options are specified in the following section tables:

1.9.1 PAGE ORIENTATION

√	**Orientation**
√	Landscape
	Portrait

1.9.2 PAGE SIZE

√	**Page Size**
	Letter (8 ½″ x 11″)
√	Legal (8 ½″ x 14″)

1.9.3 REPORT OUTPUT

√	**Report Output**
√	Formatted (PDF)
√	Formatted (Crystal Reports)
P	Formatted (Excel – not suitable for export to CSV)
	Data Extract (CSV/Excel)
* P is the primary output supported for fine grained formatting.	

1.9.4 SPECIAL OUTPUT

√	**Special Output**
	Bar Code
	Chart (specify type, e.g. pie chart)
	Label (specify size, e.g. 2″ x 3″)
	Other (specify):

1.10 BUSINESS RULES

This section contains specific business rules that are unique to this report only (i.e., rules that apply to data the report returns).

For rules pertaining to filters, data and totals for this DRDD, refer to Section 1.11 Filters, Section 1.12 Data – Columns (Body of Report) and Section 1.13 Aggregation.

For rules specific to the scheduling of all reports, refer to DDUC 11201 Schedule Report.

#	Rule
1.	Only a client's active records will used for both selection criteria and in the body of this report. An active record has an [effective from] date of today or before and an [effective to] date that is empty, today or in the future.
2.	When School Board or School is the search filter, the selected school(s) will be compared with the Client's most recent, active Employment/Education record where Occupation = Student. The record with precedence is the record with the most recent [effective from] date, followed by most recent [created date] in the case of a tie.
3.	When JOrg is the search filter and the selected JOrg has children, the report group sections contain the immediate children only. If there are no children to the selected JOrg, the report will contain a single group for the selected JOrg.
4.	When JOrg is the search filter and the report group sections contain the immediate children of the selected JOrg, the client list will include clients associated with the child JOrg and its descendant JOrgs (if any).
5.	When a School Board is the search filter the report group sections are for each school whose parent is the selected School Board. If a single School is selected the report will contain a single group for the selected School.
6.	The following clients will be explicitly excluded from this report: • Inactive clients (including deceased clients) • Indeterminate clients • Non-human clients • Clients with no gender • Clients with a gender not included in the secured coded concepts of Male, Female or Undifferentiated

#	Rule
	• Clients with no Date of Birth.

1.11 FILTERS

This section defines the Report Filters page for the report.

Refer to Legend.

#	Filter Label	Format	Business Screen/ Field Name	Required (Y/N)	Validation	Default Values	Execution Rules
1			Exactly one Client Selection Filter is required	Y	Error messages will display on rendered report if none or more than one Client Selection Filter is selected.		
2	Jurisdic tional Organiz ation	Embed ded Find Compo nent	Maintain Client/ Jurisdictional Organization (Client Selection Filter 1)	Y/N	Must be of Hierarchy type: "Jurisdictional Organization". Exactly one Client Selection Filter is required.	User's session JOrg	Select clients based on their single, active JOrg. If JOrg has child JOrgs, the report body will be rendered once for each child JOrg one level below. Each section will list all clients associated to the child JOrg and clients associated to its entire descendant JOrg hierarchy.
3	Service Delivery Location	Embed ded Find Compo nent	Maintain Client / Service Delivery Location Information (Client Selection Filter 2)	Y/N	Exactly one Client Selection Filter is required	User's session SDL	Select clients for whom the SDL [effective from] date is in the past or today and where [effective to] date is empty, today or in the future.

#	Filter Label	Format	Business Screen/ Field Name	Required (Y/N)	Validation	Default Values	Execution Rules
4	School Board / School	Embedded Find Component	Maintain Client / Employment/Education (Client Selection Filter 3)	Y/N	Must be of Hierarchy type: "School". Either School Board or School name may be selected at one time. Exactly one Client Selection Filter is required	No default	Select clients based on their most recent, active school record (as defined by BR#2). If School Board is selected report body will repeat for each School owned by that school board. Both school name and number will be captured and displayed.
5	School Year	Drop list < 20 values	Maintain Client / Employment/Education (Client Selection Filter 3)	Y/N	Either School Year or Date of Birth Range is required in combination with a school board or school.	No default	
6	Grade	Drop list < 20 values	Maintain Client / Employment/Education (Client Selection Filter 3)	N	Only valid in combination with a school board or school.	No default	
7	Class	Text	Maintain Client / Employment/Education (Client Selection Filter 3)	N	Only valid in combination with a school board or school.	No Default	
8	Gender	Multi select	Maintain Client / Gender	Y		No default	

#	Filter Label	Format	Business Screen/ Field Name	Required (Y/N)	Validation	Default Values	Execution Rules
9	Date of Birth From	YYYY/ MM/DD	Maintain Client / Date of Birth	Y/N	Required in combination with Org and SDL. Required with School if no school year is selected. Date of Birth From date is less than or equal to Date of Birth To date Must be a valid date	No default	Client DOB is equal to or greater than this date.
10	Date of Birth To	YYYY/ MM/DD	Maintain Client / Date of Birth	Y/N	Required in combination with JOrg and SDL. Required with School if no school year is selected. Date of Birth To date is less than or equal to current date Must be a valid date	No default	

#	Filter Label	Format	Business Screen/ Field Name	Required (Y/N)	Validation	Default Values	Execution Rules
11	Date First Associated	YYYY/MM/DD	Maintain Client/ Jurisdictional Organization Effective From OR Maintain Client / Employment/Education Effective From OR Maintain Client / Service Delivery Locations Effective From	N	Must be less than or equal to today's date. Must be a valid date.		Select only those clients for whom the [effective from] date of the record (JOrg, SDL or School) is the same or later than the Date First Associated. This prompt is used to generate a list of clients that became associated after the most recent immunization program for their cohort.

Legend

Table Column	Description	Examples
#	Corresponds to each filter on the report prototype.	1, 2
Filter Label	Name of field on Report Filters screen.	TB_Test_Result_ID
Format	Format for data entry of the parameter on Report Filters screen. For drop lists, indicate the potential number of values. For multi-select, indicate the likely number of selections.	Drop list (Expected number of values: Approx. 6), multi-select (Expected number of values: less than 20), text, Embedded Find Component (EFC), etc. In context.

Table Column	Description	Examples
	Refer to DDUC 11201 Schedule Reports, Appendix A – Data, Format column.	
Business Screen/ Field Name	The Panorama screen and field listing the values to be used for the filter. The field stated herein is where the filter data is originally entered for the operational system, i.e. the source of the data that shows up in the drop list being specified. Provide the associated DDUC number for the screen/field if possible (optional). For static text, state N/A in this column and specify the static text values in the Static Text column. When filters are used in groups and referred to by name when they are mandatory only under certain conditions, the filter group name may be added in parentheses.	Maintain Cohort/Cohort Result Set Name Maintain Client/ Jurisdictional Organization (Client Selection Filter 1)
Required (Y/N)	Mandatory = Y or Optional = N Mandatory only under conditions stated in Validation column = Y/N	Y, N, Y/N
Validation	Rules that apply to the values presented to the user. Refer to DDUC 11201 Schedule Reports, Appendix A – Data, Validation column.	To Date cannot precede From Date.

Table Column	Description	Examples
Default Values	Default displayed when user first enters Report Filters screen. Refer to DDUC 11201 Schedule Reports, Appendix A – Data, Default Values column.	No default, User's JOrg, today's date, all, yes.
Drop list Values	List of values referenced by a Business Screen/Field Name. If static text, specify the static text values.	Y, N
Execution Rules	Logic for execution of query to retrieve the report's data.	Compare with "Health Related Event Date". If No, suppress display of the Value column on the report.
Report Sub-ID	Indicates if report contains a variation of the data. Denotes a specific report in a series of reports. If left blank this prompt appears in all variations, if a value appears, the prompt will appear in only that variation of the report.	A only (Data on all types of Orgs), B only (Data on Aboriginal Orgs)
Static Text (Y/N)	Optional column to indicate if drop list values are static text and as such require translation into French. This indicator is for drop list values NOT sourced from iTerm. If Business Screen/Field Name = N/A, Static Text must = Y, and a list of possible values must be included here. Note that all prompt labels will be translated	Y Drop list values are: A B C

1.12 DATA – COLUMNS (BODY OF REPORT)

Refer to Legend.

#	Report Label	Business Purpose (as required)	Business Screen/ Field Name	Calculation	Additional Criteria	Display Format / Alignment
Section Name: Prompt selection values Grouping: None Sorting: Same order as on prompt page.						
1	Show values of all prompts selected.	Allows user to verify input.		Display all prompts labels from prompt page and in addition: • Show both School Name and School Number. • Show both SDL name and ID.		Display value selected or blank.
Section Name: Name of JOrg(s), SDL or School(s)/School Number(s). Grouping: By JOrg or School Sorting: • JOrg and School groups listed alphabetically ascending. • Clients listed alphabetically by Last Name, First Name.						
1	Client ID		Maintain Client / Subject ID /			Left Justified
2	Name		Maintain Client / Last Name, First Name, Middle Name	Concatenate names into one column using format: [Last name], [First name] [Middle name]		Left Justified
5	Gender		Maintain Client / Gender			Left Justified

#	Report Label	Business Purpose (as required)	Business Screen/ Field Name	Calculation	Additional Criteria	Display Format / Alignment
6	Date of Birth		Maintain Client / Date of Birth			YYYY MMM DD /Left Justified
7	Date First Associated	Used to list clients who become active in the JOrg, SDL or School after the immunization program has been completed.	Maintain Client/ Jurisdictional Organization/ Effective From OR Maintain Client / Employment/Education / Effective From OR Maintain Client – Service Delivery Locations – Effective From	[ffective from] date of Jorg, SDL or School record that included the client in result set.		YYYY MMM DD /Left Justified
8	Jurisdictional Organization		Maintain Client / Health Region Information			Left Justified
9	School Board		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified
10	School Name		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified
11	School Number		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified

#	Report Label	Business Purpose (as required)	Business Screen/ Field Name	Calculation	Additional Criteria	Display Format / Alignment
12	School Year		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified
13	Grade		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified
14	Class		Maintain Client / Employment/Education	If not searching by School, display the active record with precedence as per stated business rule.		Left Justified

Legend

Table Column	Description	Examples
#	Corresponds to each field on the report prototype.	1, 2
Report Label	Name of field on report. Allow for shorter column headings.	Result Set ID HA instead of Health Area; if blank then use the Data Name
Business Purpose	Description/purpose of field on report. State why this field is needed on the report.	An Episode Identifier is a unique ID for the notification across all Panorama instances. It is a Concatenation of Panorama Instance ID, Investigation ID, and Disease Event ID.
Business Screen/Field Name	A Panorama screen and field that contains the data to be shown on the report. This is the source of the data. Provide the DDUC number if possible (optional).	Maintain Cohort/Cohort Result Set Name

Table Column	Description	Examples
Calculation	List calculations are required to derive this field for the report.	Qty Variance times WAC.
Additional Criteria	Specified business rules or other criteria that need to be applied to the data for this report.	See Business Rule #12 (where BR 12 states that report shows primary Client name).
Display Format / Alignment	Format of the data shown on the report/ Follow the guidelines as specified in DDUC 11201 Schedule Reports, Appendix C – Commonly Used Report Layout Standards. Describe standard alignment and any deviations in Section 1.12, Data – Columns (Body of Report) If nothing is stated here, the standard will be used as displayed in the Examples.	Text, Numeric, (###) ###-####,, YYYY MMM DD, $9,999.99, $(99,999.99), 9,999, bold, italic, etc./ Left justified: ■ Where Created: Org ■ Column data, except Dollar values, decimal numbers, percentages and all quantitative numbers. ■ "Confidential" footer text Centered: ■ Report Title ■ Column Headers Right justified: ■ Panorama Logo ■ Dollar values, decimal numbers, percentages Page Numbers in format "Page x of y"
Section Name	Corresponds to each section on the report prototype.	Holding Point Alternate ID Risk Factors

Table Column	Description	Examples
Group By	Indicates whether the data is grouped and the order. If this grouping is going to be used for data aggregation, please complete a row in Section 1.13, Aggregation for this Report Label.	Field name 1 Ascending Field name 2 Descending
Sort (within section)	Ascending or descending or not sorted (default). If multiple fields are used for sorting, a number is included to indicate the order of the sort.	Primary Sort (descending by Risk Factor Start Date) Secondary Sort (ascending by Risk Factor Description)

1.13 AGGREGATION

This section specifies the aggregate for the report.

Refer to Legend.

#	Report Label to Aggregate	Aggregation Type	Desired Title for Aggregation	Display Format	Groupings to Aggregate At	Grand Aggregation
1	Client ID	Count	Total Clients		JOrg, SDL or School	
2	Client ID	Count	Total Clients Reported			Y

Legend

Table Column	Description	Examples
#	Corresponds to each Sub-Total or Total field on the report prototype.	1, 2

Table Column	Description	Examples
Report Label to Aggregate	Name of field on the report to aggregate for Sub-Total or Total field from the Report Label column in Section 1.12, Data – Columns (Body of Report).	Count of AEFIs
Aggregation Type	Aggregation type can be one of the following: average, sum, count (number of items), min/max.	Count of AEFIs for the identified combination of immunizing agent/antigen, age group, period of time, etc.
Desired Title for Aggregation	The desired title for the Groupings to Aggregate At and Grand Aggregation shown on the report.	Count of AEFIs for the identified combination of immunizing agent/antigen, age group, period of time etc.
Display Format	Format of the data shown on the report.	Text, Numeric, YYYY MMM DD, (###) ###-####, $9,999.99, $(99,999.99), 9,999, bold, italic, etc.
Groupings to Aggregate At	Specify the "Group By" field names in Section 1.12, Data – Columns (Body of Report)	Field name 1 Field name 2
Grand Aggregation	Indicates if all report data is to be aggregated.	Y, N

1.14   REPORT PROTOTYPE

Note that column labels are left justified as it is better suited to Excel, the primary output format for this report.

Client List By Jurisdiction, Service Delivery Location or School

Jurisdictional Organization	
Service Delivery Location	
Service Delivery Location ID	
City	
School Board	Greater Victoria
School Name	
School Number	
School Year	2008 / 2009
Grade	8
Class	
Gender	
Date of Birth From	
Date of Birth To	
Date First Associated	

Reynolds - 123

Client ID	Name	Gender	Date of Birth	Date First Associated	Jurisdictional Organization	School Board	School Name	School Number	School Year	Grade	Class
774903	Simpson, Homer Peter	Male	1996 Oct 12	2008 Sep 01	Victoria Branch	Greater Victoria	Reynolds Elementary	123	2008/2009	8	8-B
Total Clients	1										

Saint Patrick's - 425

Client ID	Name	Gender	Date of Birth	Date First Associated	Jurisdictional Organization	School Board	School Name	School Number	School Year	Grade	Class
774903	Simpson, Margery G	Female	1996 Aug 01	2008 Sep 01	Victoria Branch	Greater Victoria	Saint Patrick's Elementary	425	2008/2009	8	A
Total Clients	1										
Total Clients Reported:	**2**										

2.0 BUSINESS USAGE PROFILE

Table 3 displays typical usage and the percentage of a user group that would generate the report.

Table 3 – User Type and Percentage

Panorama User Type	Percentage of Panorama User Type
Nurse	50% of Nurses
Nurse Managers	100% of Nurse Managers

Table 4 displays the report run frequency, a typical report scenario, and which end user would typically generate the report.

Table 4 – Run Frequency

Run Frequency Scheduled or Adhoc	Percentage of Time	Typical Scenario (Time and Panorama User Type)
Hourly		
Daily		
Weekly		
Monthly	100%	Run pre- and post-immunization program during working hours.
Yearly		

Table 5 displays the Report Volume along with the typical number of records accessed when generating the report.

Table 5 – Report Volume

√	Report Volume	Report Load
	Low (1 to 2 pages)	Example: <100 records being accessed
√	Medium (3 to 10 pages)	Example: >100 to <2500 records being accessed
	High (more than 10 pages)	Example: >2500 records being accessed

Appendix A – Requests for Clarification

RFC is no longer used. This table is kept for historical purposes only if RFCs exist for this DRDD.

RFC	Initiator	Text
14379	D Stinson	Change references to Facility to be Organization / Service Delivery Location, as appropriate. Related to RFC 14440.
14440	D Stinson	Remove Facility ID, Facility Type from filter. Change Facility to Service Delivery Location Name. Add Education information to filter. Consistent use of Grade, Class, and School Year. Class must be text entry.

Appendix B – Clarifications

None identified.

Appendix C – Sources

None identified.

Appendix D – Confirmation

This section is retained for historical purposes only.

Date	Attendee
Immunization Week 29	Freddy Echeverri (SP), Carolyn Solomon (SP), Chad Blackburn (AB), Laura Mashinter (AB), Anna-Maria Frescura (PHAC), Ahalya Mahendra (ON), Anne Pringle (BC), Susan Taylor-Clapp (FNIHB), Nicole Boulianne (QC), Jill Chambers (MB), Doreen McConachie (PC), Frieda Kaiser (BA)

Appendix E – Report Naming Convention

The report name is specified according to the naming convention as described in the Solutions Reports and Extracts Use Guide. The convention is summarized below:

A Report number consists of:

- A Report type identifier
- A Detailed Design Use Case (DDUC) number (associated with a Functional Area)
- Alpha characters (if applicable), denoting a specific report in a series of reports.

A Report name consists of:

- A brief description of the report output

  Example: R7500B-Maintain Personal Workload – Assignment List

  Where
  - R = Report type identifier
  - 7500 = Associated DDUC number
  - B = Alpha character (in this instance, 'B' denotes the second report in the series of 7500 Reports)
  - - = Separator character. The segment before the first dash in the report name is the permission name. The dash is normally dropped when referring to the report but is required by the implementing system.
  - Maintain Personal Workload – Assignment List = Brief description of report