



# **User Guide**

# IMMUNIZATION

# Add Historical Immunization

## **Revision History**

#### **Document History**

Date	Version	Author	Changes / Comments
August 20, 2014	0.1	Josie Salvail	Initial Draft
August 25, 2014	0.2	Tracy Forbes	Historical immunization estimated date and minor updates.
August 25, 2014	0.3	Josie Salvail	Updated forecast screen shot, minor formatting updates.
August 25, 2014	1.0	Tracy Forbes	Accepted all changes and incremented to V1.0.
January 20, 2015	1.1	Tracy Forbes	Removed dates from footers.
January 29, 2015	1.2	Tracy Forbes	Updates from Dr. Shauna Hudson to reflect Consent Refusal and Do Not Use Policies



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### A. Introduction

The Client Immunization View/Add screen allows you to enter historical immunizations (i.e., immunizations that were not witnessed by the user entering the information). These will be included in the client's immunization history to provide a more complete picture of the client's immunization status.

The VACCINATION DETAIL ADD screen is used to record the details of the historical immunization(s).

#### **RELATED USER GUIDES:**

Administer Immunizations, View Client Immunization Profile, Search Client, and Panorama 101.

- ASSUMPTIONS: The user has successfully logged into Panorama. The user has the appropriate security permissions to perform the assigned tasks. For historical immunizations, it is assumed that consent was collected at the time of immunization.
- PRE-REQUISITES: The user has successfully logged into Panorama. User is in the Immunization module (tab). Client is in context.

MENU ACCESS: Select IMMUNIZATIONS > RECORD & UPDATE IMMS from the left hand navigation.

• •	lient	L
	Search Clients	
	Client Details	
	Client Warnings	
	Relationships	
	Households	
	Consent Directives	
	Allergies	
	Risk Factors	
	Travel History	
	Imms History Interpretation	
	Upload Clients	
	Client Merge	
	Resolved Client Matches	
► C	ohort	
<b>→</b> Ir	mmunizations	
ſ	Record & Update Imms	١
C	view Client imms profile	ľ
	Special Considerations	
	Adverse Events (AEFI)	



#### **CLIENT IMMUNIZATION VIEW/ADD SCREEN**

Client ID:	Name(First,M	liddle,Last)/Gender:	Health Card	d No:		Date of Birth / A	ge:
582 Phone Number:	Jake JS-Rattle	esnake / Male	- Additional		ional ID:	2007 Jul 21 / 7 yr	s 1 mos
-(=)	Saskatchewar	n,Saskatoon RHA	Provincial h	ealth service pro	ovider identifier / -		
					Wait Queue		\$ A
Client Immunizat	ion Profile					🛠 Hide	e Immuniza
Double-click in any	date field below	to enter the default da	te:			2	014 08
Immunizing Agent						уу	yy mm
	\$						
	\$				] [ ]		
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X - Some or part of the Antigen Count	Add Provid	t meet local schedule. der Recorded Add I	Non-Provider F ations Adv	Recorded A	dd Historical Details	s Add Historical sent Allergies	Profile
X - Some or part of the Antigen Count Immunization F Last forecast ran or	Add Provid	Image: Instant Schedule.         der Recorded       Add I         Special Consider         Refresh Forecast	Non-Provider F ations Adv	Recorded A	Add Historical Details	s Add Historical sent Allergies	I & Save Profile Show Ant
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#### NOTE: The CLIENT IMMUNIZATION VIEW/ADD screen

includes a summary view of the client's immunization history, the antigen count (count of doses administered by antigen), immunization forecast, deferrals, invalid immunizations, special considerations, reminder/recall count, and a summary of TB skin tests.

**TIP:** To "hide" and "show" components of the screen, click the Hide or Show hyperlinks for the specific component to either collapse the section or view the details.



NOTE: The VACCINATION DETAIL ADD screen is used to record the details of the immunization.

NOTE: The Historical Immunization flag must be set to YES in the PERSONAL SETTINGS screen for the user defaults for ORG and SDL to auto populate while recording Historical Immunization. Any default values may be overridden.







### B. Steps to add historical immunization

# 1. Select **IMMUNIZATIONS** > **RECORD & UPDATE IMMS** from the left hand navigation. The **CLIENT IMMUNIZATION VIEW/ADD** screen displays.

Client ID: 582	Name(First, M Jake JS-Ratt	/liddle,Last)/Gender: esnake / Male	Health Card No:		Date of 2007 Ju	Birth / Age: Il 21 / 7 yrs 1 mos
Phone Number: -(-)	Jurisdiction Saskatchewa	Info: n,Saskatoon RHA	Additional ID Type Provincial health ser	/ Additional ID: vice provider identifier / -		
				Wait Queue		÷ A
Client Immuniza	tion Profile					<b>☆ Hide Immuniza</b>
Double-click in any	y date field below	v to enter the default da	te:			2014 08
Immunizing Agen	t					уууу тт
	\$					
	\$					
	\$					
	\$					
E - The date is estir O - The status for th X - Some or part of	nated for this histo his immunization h the vaccine did no Add Provi	orical immunization. as been overridden. ot meet local schedule.	Non-Provider Recorde	d Add Historical De	tails Add	Historical & Save

#### **NOTE:** Multiple

immunization dates for a single immunizing agent may be entered when recording historical immunizations.

**TIP:** If entering a seventh or subsequent immunization for the same agent for a client, select the agent from the drop-down on a new row, and enter dates as per usual. All immunizations for one agent will be displayed together once saved.



2. On the **CLIENT IMMUNIZATION VIEW/ADD** screen, select an Immunizing Agent from the **IMMUNIZING AGENT** drop-down list.

						ACTIVE
Client ID: 582	Name(First, Jake JS-Rati	Middle,Last)/Gender: lesnake / Male	Health Card No:		Date of Birth / Age: 2007 Jul 21 / 7 yrs 1 mos	
Phone Number: -(-)	Jurisdiction Saskatchewa	Info: an,Saskatoon RHA	Additional ID Type / Ad Provincial health service	ditional ID: provider identifier / -		
				Wait Queue	÷) [/	Add to W
Client Immunizat	ion Profile				<b>☆</b> Hide Immuniza	ation Profi
Double-click in any	date field below	w to enter the default date:	The default date. Chang	date is todays e this date to date	2007 09 yyyy mm	30 🚺
DTaP-IPV-Hib	÷	2007/09/30	Double click date or ente	to enter the default r the date.		
	\$					
	<b>*</b>					
E - The date is estim O - The status for this X - Some or part of the buttons are	ated for this hist s immunization h he vaccine did n	orical immunization. has been overridden. ot meet local schedule.	n-Provider Recorded	Add Historical Potalle	Add Historical & Save	Clear
vated once the nt and Date are	Add Prov	Special Consideration	ions Adverse Event	Add Historical Details	Add Historical & Save	Report

 Double-click the first available date field for that row to enter the current date. Optionally, manually enter the immunization date directly into the field using the format yyyy/mm/dd – the slashes are automatically generated by the system. You may enter multiple historical immunizations (see screen shot example).

	iela below	to enter the default date:	2007 09 30 yyyy mm dd			
mmunizing Agent						
DTaP-IPV-Hib	\$	2007/09/30 2007/12/15 2008/02/20 2008/08/22 2009/03/23	3			
Pneu-C-13	\$	2007/09/30 2007/12/15 2008/08/22				
MMR	\$	2008/08/22				
Var	\$	2009/03/23				
- The date is estimated for this historical immunization The status for this immunization has been overridden Some or part of the vaccine did not meet local schedule.						

**TIP:** If the buttons at the bottom of the screen are not activated, and a date is in the date field and correctly entered, just click once on the date field. This click "enters" the date in the field.

**TIP:** To quickly enter historical information, enter all the information on the screen, and click **Add Historical & Save**. This is useful when there are no additional immunization details to add to the record.

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**TIP:** There are only two required fields when saving a historical immunization: 1) immunizing agent; and 2) date of immunization.

**NOTE:** The Vaccine Detail Add screen is the same for adding historical or administered immunizations. The only difference is that when adding an administered immunization, there are many more required fields.

**NOTE:** Lot numbers may be captured in comment section for Historical vaccines, if that information is known and the lot is no longer available in the drop list.

NOTE: Revise dose is used when a vaccine dose was not properly recorded or a dose was missed. This allows a practitioner to override the forecaster as to whether the dose is valid or not. See clinical practice guidelines for more information. If a dose is revised, a reason must be given, and the practitioner must also provide comments to justify the revision.

The system makes available all action buttons below the Client Immunization Profile summary table.

PANORAN

4. Click ADD HISTORICALS & SAVE, if you don't have additional information relating to the historical immunization. A message will display indicating that the vaccination(s) were added successfully. If you do have additional information relating to the immunization(s), click ADD HISTORICAL DETAILS.

Note: When historical documentation includes partial immunization dates dates rather than accurate or known, select the **Estimated** checkbox beside the <u>Date Administered</u> field in the Add Immunization details page. Enter the Year of birth and the Month and Day where known; use "01" to replace where Month or Day are not known – e.g. 2014-01-01 if month and day of birth are unknown.

The **VACCINATION DETAIL ADD** screen displays. The **IMMUNIZING AGENT** and **DATE ADMINISTERED** will default from the previous screen. The **HISTORICAL** indicator will be set to **YES**.

5. Enter any available pertinent information regarding the historical immunization.

Add Immunization	
* Immunizing Agent 1:	MMR Status: Set By Forecaster
* Date Administered:	2009 09 18 🖽 🕞 Estimated
Time Administered:	Let the second s
Age at Administration:	2 yrs 1 mos
Historical:	YES 💿 NO
Information Source:	select \$
Lot Number:	select ‡
Display Expired and Recalled Lots	$\checkmark$
Trade Name:	
Manufacturer:	
Publicly Funded:	
Dosage:	Dosage UOM:select +
Site:	select  \$ Route:select \$
Reason for Immunization:	select \$
Revised Dose Number:	
Revised Dose Reason:	select \$



#### NOTE: You can

indicate the Date for a Historical Immunization event as Estimated by selecting the Estimated check box. Estimated dates will display on the Immunization summary screen prefaced by an E next to the Date.

an	_			57
PAN	0	RA	M	A

Add Immunization	
* Immunizing Agent 1:	DTaP-IPV-Hib
* Date Administered:	2014         08         25         III         III         III         Estimated           yyyy         mm         dd         III         IIII         IIII         IIII         IIIII         IIIIII         IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Time Administered:	L PDT hh mm

The historical immunization will then display an 'E' in the **Client Immunization Profile** (see below).

Client Immunization Profile	✓ Contains Data	☆ Hide Immunization Profile
Double-click in any date field below	v to enter the default date:	2014 08 25 📖 yyyy mm dd
DTaP-IPV-Hib	E 2014 Aug 25	

#### 6. To enter **REVISED DOSE COMMENTS**, enter the comments and click **ADD**.

Revised Dose Comments:	
	(4000 characters)
Date Comments Recorded By	
Information Sheet Given Date:	If you enter comments, remember to click Add
	(4000 characters) Add
Date Comments Recorded By	
Needs Verification:	

- 7. To enter **COMMENTS**, enter the comments and click **ADD**.
- 8. Select the **NEEDS VERIFICATION** check box if the record needs verification.

If Verification box checkbox is checked, the Workgroup and Panorama User selection appears below. Select a Workgroup or a User within a workgroup to assign the verification task to.

Note: Saskatchewan is not currently implementing Needs Verification functionality – it may be included in a future release.



#### **NOTE:** Workgroups

need to be set up in advance. Only authorized users may create and update workgroups in the Work Management Module.

# NOTE: Make sure the IMMUNIZATION USER DEFAULT

settings are set for the user to expedite data entry if required. If the Historical Immunization flag is set to **YES** then the **ORG** and **SDL** fields will auto populate – be sure that no other information is defaulted incorrectly such as Lot Number.

Select at least one assignee: a u	ser (within a workgroup) or a workgroup.				
workgroups:	Panorama User:				
select	Look Up Users				

#### 9. Select a **PROVIDER** if known, using the **FIND** button.

Provider:		
Click Find to select a provider:		
Provider:		Find Q
Organization:		
To specify an Organization first click on the 'Find' butto button. Then click 'Close' to close.	on. Then search, or type the name of the Organization you wish to specify, selec	t it and click on 'Select'
Organization: Top Level > Level 2 (specific one) >	Level 3 (specific one) > [Selected Level 4 Organization]	Find Q
Service Delivery Location:	SDL Id:	
Service Delivery Location: To specify a Service Delivery Location first click on the and click on 'Select' button. Then click 'Close' to close.	<b>SDL Id:</b> 'Find' button. Then search, or type the name of the Service Delivery Location y	ou wish to specify, select it
Service Delivery Location: To specify a Service Delivery Location first click on the and click on 'Select' button. Then click 'Close' to close. Service Delivery Location: Top Level > Level 2 (s	SDL ld: 'Find' button. Then search, or type the name of the Service Delivery Location y specific one) > Level 3 (specific one) > [Selected Level 3 Location]	ou wish to specify, select it Find Q

- 10. Select an **ORGANIZATION** if known, using the **FIND** button.
- 11. Select a **SERVICE DELIVERY LOCATION** if known, using the **FIND** button.
- 12. Click SAVE.

Service Delivery Location:	SDL Id:
To specify a Service Delivery Location first click on the 'Find' button and click on 'Select' button. Then click 'Close' to close.	Then search, or type the name of the Service Delivery Location you wish to specify, select it
Service Delivery Location: Top Level > Level 2 (specific one)	> Level 3 (specific one) > [Selected Level 3 Location] Find Q
	Save





# The **CLIENT IMMUNIZATION VIEW/ADD** screen displays, showing the immunizations in the Client Immunization Profile summary table.

Client ID:	Name(First,	Middle,Last)/Gender:	Health Car	rd No:		Date of Birt	h / Age: / 7 vrs 1 mos	
Phone Number:	Jurisdiction	Info: In Saskatoon RHA	Additional Provincial	ID Type / Additio	nal ID:	2007 00721	in yra i moa	
ccination(s) were ac	Ided successfull	y.						
					Wait Queue		÷ A	dd to
ient Immunizat	ion Profile			✓ Contains Data		1	Hide Immuniza	tion P
ouble-click in any	date field belov	v to enter the default	date:				2014 08	21
mmunizing Agent							yyyy mm	dd
DTaP-IPV-Hib		2007 Sep 30	2007 Dec 15	2008 Feb 20	2008 Aug 22	2009 Mar 2	<u>13</u>	
MMR		2008 Aug 22	2009 Sep 22					
Pneu-C-13		2007 Sep 30	2007 Dec 15	2008 Aug 22				
/ar		2009 Mar 23						
	\$							
	\$							
	\$							
	\$							

The immunization forecast algorithm is applied to the immunizations that were just recorded to determine their validity. If an antigen is given outside of the recommended intervals, the system will deem it invalid and will display the immunization(s) with an 'X' in front of the date in the **CLIENT IMMUNIZATION PROFILE** summary table.

The immunization forecast algorithm is applied to the immunizations that were just recorded to determine their validity. If an antigen is given outside of the recommended intervals, the vaccine forecaster system will deem it invalid and will display the immunization(s) with an 'X' in front of the date in the **CLIENT IMMUNIZATION PROFILE** summary table. Consult your Super User if you have questions about an invalid dose.

**NOTE:** The forecaster will deem immunizations as invalid if they are not within the parameters of Saskatchewan Immunization Rules. These will be marked with an X in front of the date of immunization.



**NOTE:** Immunization Forecast section is updated to reflect historical immunizations.

# PANORAMA

#### The **ANTIGEN COUNT** is updated to reflect the immunizations added.

Antigen Count	✓ Contains Data	_		☆ Hide Antigen Cour
Doses by Antigen		Valid Doses	Invalid Doses	Total
Diphtheria (D)		5	0	5
Haemophilus influenzae type b (Hib)		5	0	5
Measles (M)		2	0	2
Mumps (Mu)		2	0	2
Pertussis (aP)		5	0	5
Pneumonia (Pneu-C-u)		3	0	3
Polio (IPV)		5	0	5
Rubella (R)		2	0	2
Tetanus (T)		5	0	5
Varicella (Var)		1	0	1

#### Within the CLIENT IMMUNIZATION VIEW/ADD SCREEN, the IMMUNIZATION

**FORECAST** section is updated to reflect the historical immunization(s) that were just recorded (i.e. the immunization are removed from the forecast).

mmunization Forecast (by Agent)						
Last forecast ran on: [Only available for clients who have forecasted agents or antigens] Refresh Forecast						
Forecast status as of date:						
Immunizing Agent	Dose	Volume	Brand	Due	Eligible	Status
<ul> <li>Extra dose safe antigen.</li> <li>Indicates a mix of different antigen dose numbers within the Agent.</li> <li>Due - The recommended date for the immunization has been reached.</li> <li>Overdue - The recommended date for this dose has passed.</li> <li>Up to Date - The client is not yet due for the immunization.</li> <li>Eligible - The client has reached or is past the eligibility date, but is not yet due for the Immunization.</li> </ul>						

Any invalid immunizations will be recorded in the Invalid/Uncounted Immunizations section.

Invalid/Uncounted Immunizations		✓ Contains Data	Hide Invalid/Uncounted Immunization	
1	Some or part of these vaccines did not	t meet local schedule.		
	Invalid/Uncounted Immunizations Date of Immunization		Invalid/Uncounted Antigens	Reason
	Var	2009 Mar 26		Administered Outside Recommended Schedule or Practice