

Administer Immunization

USER GUIDE

- ✓ Immunization Events
- ✓ Deferrals
- ✓ Immunization Profile Report
- ✓ Immunization Defaults

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Revision History

Author	Date	Version	Notes
Josie Salvail	2014/08/20	0.1	Initial Draft
Tracy Forbes	2014/08/28	1.0	Increment version
Josie Salvail	2014/09/05	2.0	Added Deferral section
Tracy Forbes	2015/01/20	2.1	Removed dates from footers
Tracy Forbes	2015/01/29	2.2	Updates from Dr. Shauna Hudson to align with Policy on Do Not Use and Documentation of Immunization Refusal
Jeff Moser	2017/03/21	3.0	Updates to reflect Panorama version 3.0.1
Jeff Moser	2017/03/29	3.1	Added a new section in Immunization Events for adding Historical Immunizations
Kyle Schembri	2017/06/13	3.2	Updates to the Deferral section to clarify that the end-date must be before the date the client was vaccinated.

Introduction

The Immunization Profile screen is the launching point for recording immunization events, consent for immunization service, special considerations, deferrals and allergies. The user may also print the client's Profile Report from this screen.

For specific instructions on adding a deferral, see the Deferrals section.

Related User Guides: Add Historical Immunizations, Record Consent, Quick Tip Client Search and Registration, Maintain Client.

Pre-Requisites

- ✓ You are logged into Panorama, and have the appropriate security permissions to perform the assigned tasks; and,
- ✓ You are currently in the Immunization module, by selecting Immunization from the top menu in Panorama.
- ✓ Your Immunization Defaults have been set.

Immunization Events

PRE-REQUISITES:

- ✓ A Client has been placed into context.
- ✓ Consent has been recorded for the relevant agents.
- ✓ Immunization Defaults are set to speed up data entry.

Reviewing the Client's Immunization Profile

- 1) Select **Immunizations > Immunization Profile** from the Left-Hand Navigation.
The Update Client Immunization Profile is displayed.

NOTE: If there are Client Warnings, a warning notification is visible in the client header. If there is a Warning notification, click on the hyperlink to view the details.

Update Client Immunization Profile

Client ID: 5671 | Name (Last, First Middle)/Gender: ADESINA, WILMA / Female | Health Card No: 866678620 | Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-6666 (Workplace) | Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth | Additional ID Type / Additional ID: Provincial health service provider identifier / -

Immunization Details

Immunization History - Summary Grid

Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
BCG	2010 Jul 04 (R)					

- 2) Review the client's immunization history in detail prior to administering an immunization, as per clinical best practises. There is a summary view at the top of the immunization history section and below it is a detailed view. It is important to review the information with the client to ensure it is correct.

Update Client Immunization Profile
Launch Report
Add to WQ
Save
Reset
?
log

Active

Client ID: 5671

Name(Last, First Middle)/Gender: ADESINA, WILMA / Female

Health Card No: 866678620

Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-6666(Workplace)

Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth

Additional ID Type / Additional ID: Provincial health service provider identifier / -

Immunization Details

Immunization History - Summary Grid

Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
BCG	2010 Jul 04 (R)					
DTaP-IPV	2014 Jul 16 (R)					
DTaP-IPV-Hib	2010 Nov 03 (R)	2011 Jan 26 (R)	2011 Mar 30 (R)	2012 Mar 12 (R)		
HA	2011 Jul 19 (R)	2012 Mar 12 (R)				
Inf	2013 Nov 07 (R)					
Men-C-unspecified	2011 Jul 19 (R)					
MMR-Var	2011 Jul 19 (R)	2012 Mar 12 (R)				
Pneu-C-13	2010 Nov 03 (R)	2011 Jan 26 (R)	2011 Mar 30 (R)	2012 Mar 12 (R)		

Immunization History - Detailed Data Table

Add Single Immunization
Add One or More Immunizations

Update	View	Delete	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
			BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
			DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL
			DTaP-IPV-Hib	2010 Nov 03	4m 1d	Valid	-1		Right Leg	0.5 mL
			DTaP-IPV-Hib	2011 Jan 26	6m 24d	Valid	-1		Right Leg	0.5 mL
			DTaP-IPV-Hib	2011 Mar 30	8m 28d	Valid	-1		Right Leg	0.5 mL

- 3) You can also browse through more information like Special Considerations, AEFI, Allergies, Deferral, Risk Factors, TB Skin Test, IGRA Tests, Mass Imms Event, View Consent and IHI. Click on the corresponding tab to view that information. Any tabs with a "✓" indicates that there is some data in that tab.

	Pneu-C-13	2011 Mar 30	8m 28d	Valid	-1		Left Leg	0.5 mL
	Pneu-C-13	2012 Mar 12	1y 8m	Valid	-1		Left arm	0.5 mL

Special Considerations
AEFI
Allergies
✓ Deferrals
Risk Factors
TB Skin Test
IGRA Tests
Mass Imms Event
View Consent
IHI

Immunizing Agent	Reason	Created By	Effective From	Effective To
MMR-Var	IT disruption	Training, User M Dr	2017 Mar 01	2017 Mar 05

Total: 1
1
10

TIP: If any section contains data, there will be an "✓" indicator in the section header.

NOTE: If you see that the Special Considerations section contains data “✓”, you must click on that tab to determine what the information is (Contraindications, Exemptions, Precautions, and Adverse Event Following Immunization).

- 4) Scroll to the Antigen Count section to review Valid and Invalid Doses by Antigen. If the title bar contains a “✓”, then there is data in that section to review and it can be opened by clicking the double arrow icon to the right of the section title. If there is more than one page of information click the number or arrows to navigate through the data.

Antigen Count			
Doses By Antigen	Valid Doses	Invalid Doses	Total
Bacillus Calmette Guerin (BCG)	1	0	1
Diphtheria (D)	5	0	5
Haemophilus influenzae type b (Hib)	4	0	4
Hepatitis A (HA)	2	0	2
Influenza (Inf)	1	0	1
Measles (M)	2	0	2
Meningitis (Men-C-u)	1	0	1
Mumps (Mu)	2	0	2
Pertussis (aP)	5	0	5
Pneumonia (Pneu-C-u)	4	0	4
Total: 14			

- 5) Scroll to the Immunization Forecast by Agent/Antigen section to review the recommended immunizations and due dates for the client. Confirm the client's forecast against the Saskatchewan schedule before proceeding with the vaccine administration. You can refresh the list by clicking the **Refresh Forecast** button.

TIP: The Immunization Forecast by Agent/Antigen section displays the recommended future and overdue immunizations for the client according to the Panorama Forecaster.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2017 Mar 17								
Forecast Status calculated as of: 2017 Mar 17								
								Refresh Forecast
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Men-C-C	1				2011 Jul 02	2011 Jul 02	2011 Jul 03	Overdue
Inf	2				2016 Oct 01	2017 Mar 17	2017 Mar 17	Overdue
HB	1		1 mL		2021 Jul 02	2021 Sep 01	2022 Sep 01	Up To Date
HPV-4	1				2020 Jul 02	2021 Sep 01	2022 Sep 01	Up To Date
Men-C-ACYW-135	1				2020 Jul 02	2021 Sep 01	2022 Sep 01	Up To Date
Tdap	6				2021 Jul 02	2022 Sep 01	2023 Sep 01	Up To Date

Record a Single Immunization Event

- 1) In the Immunization History – Detailed Data Table in the Immunization Details section, click the **Add Single Immunization** drop-down button and select the **Add Provider Recorded** option.

The Add Immunization section displays.

NOTE: The Provider Recorded Immunization has the highest level of detail required and the screen for that action will be displayed below. The other two options, **Add Non-Provider Recorded** and **Add Historical** use the same screen, but require less details. Please refer to the [Adding Historical Immunizations](#) section for more details.

Immunization History - Detailed Data Table

<div><div>UpdateViewDelete</div><div><div><div>▼ Add Single Immunization</div><div>Add Historical</div><div>Add Non-Provider Recorded</div><div>Add Provider Recorded</div></div><div>▼ Add One or More Immunizations</div></div></div>									
		Agent ▲	Date Administered ⇅	Age at Administration ⇅	Status ⇅			Body Site ⇅	Volume ⇅
		BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
		DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL
		DTaP-IPV-Hib	2010 Nov 03	4m 1d	Valid	-1		Right Leg	0.5 mL
		DTaP-IPV-Hib	2011 Jan 26	6m 24d	Valid	-1		Right Leg	0.5 mL
		DTaP-IPV-Hib	2011 Mar 30	8m 28d	Valid	-1		Right Leg	0.5 mL

NOTE: Lot Number, Site, Provider, Service Delivery Location and/or Organization will be automatically populated if defaults have been set for the user on the Immunization Defaults screen. Any default values may be overridden.

- 2) Complete all required fields in the Add Immunization section.

Add Immunization Record Consent Apply Reset Cancel

Immunization Type: Provider Recorded

* Agent: HA

* Date Administered: 2017/03/21 hh:mm CDT

Age at Administration: 6 years 8 months days

Consent Readiness: Missing

* Consent for Service Override/Bypass Reason:

Reason for Immunization:

Information Source:

* Provider: Provider, MOH

Verification Status: ☒ Requested ☐ Not Requested ☐ Completed

* Workgroup: AEFI

User: User Training/Saskatchewan

* Organization: Regina Qu'Appelle RHA, Regina, Saskatchewan

* Service Delivery Location: Regina Central Public Health Office, Regina, Saskatchewan

- a) Enter the **Date Administered**.

IMPORTANT: If the client grants consent and is immunized on the same day, you will be required to enter the time of the immunization event into the time field. If the signed consent is received and recorded at least 1 day (or more) prior to the immunization event, the time is not required to process the immunization in Panorama. Speak with your Immunization Key User or Public Health Nursing Manager for questions.

- b) Enter the **Holding Point Name** and **Holding Point Location** from the drop lists.
- c) Update the **Immunization Lot Number** as required.
- i) Please note: the default is set based on the user's immunization defaults. It is important to update this field with the correct lot number. Once the correct lot number is selected, other details related to that immunization are pre-populated (Trade Name, Manufacturer, Dosage, Dosage UOM).
- d) Enter the **Site** and **Route** of the immunization as required.
- i) Please note: these are populated from the User's Immunization Defaults. If the defaults are not set up in advance, they will not pre-populate.
- e) Select the **Reason for Immunization**.
- f) **Comments** should be entered only if there is pertinent information related to the immunization being given. Be sure to click **Add** once the comments have been entered to save them to the screen.
- i) Please note: Saskatchewan is not currently implementing clinical notes functionality – it will be included in a future release.
- g) The Verification Status section is not used in Saskatchewan. Select **Not Requested** to ensure this feature is turned off.
- 3) If consent has not been previously recorded for the client, click the **Record Consent** button from the top of the screen.
The Record Consent for Service section displays.

Record Consent for Service

Clients:
ADESINA, WILMA

Consent will be recorded for agents:
☒ BAT

* Instruction:
Grant

Reason for Refusal:

Reason Description:

* Effective From:
2017/03/18

To:
yyyy/mm/dd

Number of Doses:

Form of Consent:

Consent Given To:
☒ Not Specified
☐ Current User Training, User
☐ Other

Consent Given By:
☒ Not Specified
☐ Related Client
☐ Other Relation Relationship Type

Comments:

Save Reset

- a) Enter consent details and click the **Save** button to save the Consent Directive.

See the Record Consent User Guide for detailed information relating to consent for immunization service.

IMPORTANT: If the client grants consent and is immunized on the same day, you will be required to enter the time of the immunization event into the time field. If the signed consent is received and recorded at least 1 day (or more) prior to the immunization event, the time is not required to process the immunization in Panorama. Speak with your Immunization Key User or Public Health Nursing Manager for questions.

- 4) Click **Apply** in the Add Immunization section to save the Immunization.

The Immunization record will appear in the data table. The **add file image** under the disk icon column indicates that the record has not been saved to the database. Click the **Save** button at the top of the Update Client Immunization Profile screen to commit the record to the database.

Update Client Immunization Profile Launch Report Add to WQ **Save** Reset ? log

Immunization History - Detailed Data Table

Update View Delete

▼ Add Single Immunization ▼ Add One or More Immunizations

	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
<input type="radio"/>	HA	2017 Mar 20	6y 8m			HAVRIX 1440	Left arm	1 mL

Record One or More Immunization Events

- 1) In the Immunization History - Detailed Data Table within the Immunization Details section, click the **Add One or More Immunizations** drop-down button and select the **Add Provider Recorded** option.

Immunization History - Detailed Data Table

Update View Delete

▼ Add Single Immunization ▼ Add One or More Immunizations

	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
<input type="radio"/>	BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
<input type="radio"/>	DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL
<input type="radio"/>	DTaP-IPV-Hib	2010 Nov 03	4m 1d	Valid	-1		Right Leg	0.5 mL
<input type="radio"/>	DTaP-IPV-Hib	2011 Jan 26	6m 24d	Valid	-1		Right Leg	0.5 mL
<input type="radio"/>	DTaP-IPV-Hib	2011 Mar 30	8m 28d	Valid	-1		Right Leg	0.5 mL
<input type="radio"/>	DTaP-IPV-Hib	2012 Mar 12	1y 8m	Valid	-1		Right Leg	0.5 mL

Add Historical
Add Non-Provider Recorded
Add Provider Recorded

The Add Multiple Immunizations section displays.

- 2) Enter the **Agent(s)** and **Date(s)** as required. Click the **Enter Details** button to continue.

TIP: Click the **Add 4 Rows** button if more immunization records are to be added.

Immunization History - Detailed Data Table

Add Multiple Immunizations Record Consent **Enter Details** Reset Cancel

Immunization Type:
Non-Provider Recorded

Click a table cell to select or enter a value. Add 4 Rows

Agent	Date 1	Date 2	Date 3	Date 4
DPT-Hib	2017/03/08	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
Pneu-C-10	2017/03/16	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd

The Override/Set Defaults for New Immunizations section will appear.

Immunization History - Detailed Data Table

Override/Set Defaults for New Immunizations Next Reset Cancel

The following default values will be used when creating immunizations within this transaction:

Provider:
Provider, MOH

Organization:
Regina Qu'Appelle RHA, Regina, Saskatchewan

Service Delivery Location:
Regina Central Public Health Office, Regina, Saskatchewan

Information Source:
[Dropdown]

- 3) Enter or override any of the Override/Set Defaults for New Immunizations fields and click the **Next** button.
The Add Immunization section will appear.

Immunization History - Detailed Data Table

Add Immunization Apply & Next Remove & Next Reset Cancel

Immunization Type: Provider Recorded 1 of 2 immunizations

*** Agent:**
DPT-Hib

*** Date Administered:**
2017/03/08 hh:mm CDT

Age at Administration:
6 years 8 months days

Consent Readiness:
Missing

*** Consent for Service Override/Bypass Reason:**
[Dropdown]

Reason for Immunization:
[Dropdown]

Information Source:
[Dropdown]

*** Provider:**
Provider, MOH

Verification Status:
☐ Requested
☒ Not Requested
☐ Completed

*** Organization:**
Regina Qu'Appelle RHA, Regina, Saskatchewan

*** Service Delivery Location:**
Regina Central Public Health Office, Regina, Saskatchewan

Vaccine Details

Holding Point Name:
Regina Central Public Health Office

Holding Point Location:
ReginaCentralPHO.A

*** Lot Number:**
☐ Display Expired and Recalled Lots
☐ Show All ☐ Publicly Funded ☐ Non-Publicly Funded

Dosage:
[Text]

Dosage UOM:
[Dropdown]

*** Site:**
[Dropdown]

*** Route:**
[Dropdown]

Trade Name:
[Text]

Manufacturer:
[Text]

Publicly Funded:
☐

Manufacturer:
[Text]

Comment
[Text]

To create a new record click Add. Add

- 4) Fill in the required details and click **Apply & Next** to fill in details for the next immunization record. Repeat this step for all records.

- 5) When complete, the Immunization record(s) will appear in the data table. The **add file image** under the disk icon column indicates that the record(s) have not been saved to the database. Click the **Save** button at the top of the Update Client Immunization Profile screen to commit the record(s) to the database.

Update Client Immunization Profile

Launch Report

Add to WQ

Save

Reset

?

log

Immunization History - Detailed Data Table



Update

View

Delete

Add Single Immunization

Add One or More Immunizations

		Agent ↕	Date Administered ▾	Age at Administration ↕	Status ↕	Revised Dose ↕	Trade Name ↕	Body Site ↕	Volume ↕
<input type="radio"/>		Pneu-C-10	2017 Mar 16	6y 8m					
<input type="radio"/>		DPT-Hib	2017 Mar 08	6y 8m					
<input type="radio"/>		DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL

Recording Historical Immunizations

Record a Single Historical Immunization

- 1) In the Immunization History – Detailed Data Table section click the drop-down list titled **Add Single Immunization** and select **Add Historical**.

Update Client Immunization Profile [Launch Report] [Add to WQ] [Save] [Reset] [?] [log] [print]

Immunization History - Detailed Data Table

[Update] [View] [Delete]

▼ Add Single Immunization ▼ Add One or More Immunizations

Add Historical
Add Non-Provider Recorded
Add Provider Recorded

	Agent	Date Administered	Age at Administration	Status		Body Site	Volume
	BCG	2010 Jul 04	0m 2d	Valid	-1	Wound	0.05 mL
	DPT-Hib	2017 Mar 01	6y 7m	Invalid			
	DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1	Left arm	0.5 mL

The Add Immunization section will appear.

Update Client Immunization Profile [Launch Report] [Add to WQ] [Save] [Reset] [?] [log] [print]

Immunization History - Detailed Data Table

Add Immunization [Record Consent] [Apply] [Reset] [Cancel]

Immunization Type: Historical

* Agent: Chol-I

* Date Administered: 2017/03/26 [calendar icon] hh:mm CDT [checkbox] Estimated

Age at Administration: 6 years 8 months 0 days

Consent Readiness: Missing

Reason for Immunization: Routine

Information Source:

Provider: e.g. Provider Last Name, First Name [info icon] [search icon]

Verification Status:
☐ Requested
☒ Not Requested
☐ Completed

Organization: e.g. Organization Display Name [info icon] [search icon]

Service Delivery Location: e.g. SDL Display Name [info icon] [search icon]

- 2) Fill in any of the known details about the immunization. At a minimum, the **Agent** and **Date Administered** fields must be complete. All other fields are optional.
- 3) Click the **Apply** button.
- 4) When complete, the Immunization record will appear in the Immunization History - Detailed Data Table. The **add file image** under the disk icon column indicates that the record has not been saved to the database. Click the **Save** button at the top of the **Update Client Immunization Profile** screen to commit the record to the database.

Update Client Immunization Profile Launch Report Add to WQ **Save** Reset ? log

Immunization History - Detailed Data Table

Update View Delete

▼ Add Single Immunization ▼ Add One or More Immunizations

	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
	BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
	Chol-I	2017 Mar 26	6y 8m				Right arm	
	DPT-Hib	2017 Mar 01	6y 7m	Invalid				

Add One or More Historical Immunizations

- 1) In the Immunization History – Detailed Data Table section click the drop-down list titled **Add One or More Immunizations** and select **Add Historical**.

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

Immunization History - Detailed Data Table

Update View Delete

▼ Add Single Immunization ▼ Add One or More Immunizations

Add Historical
Add Non-Provider Recorded
Add Provider Recorded

	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
	BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
	DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL
	DTaP-IPV-Hib	2010 Nov 03	4m 1d	Valid	-1		Right Leg	0.5 mL

The Add Multiple Immunizations section will appear.

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

Immunization History - Detailed Data Table

Add Multiple Immunizations Record Consent Apply Without Details Enter Details Reset Cancel

Immunization Type:
Historical

Click a table cell to select or enter a value. Add 4 Rows

Agent	Date 1	Date 2	Date 3	Date 4
HA	2015/07/10	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd

- 2) Select an **Immunization Agent** from the drop-down list and then manually enter the date of the immunization or click the calendar to select the date from a calendar pop-up. Enter as many agents and dates as required.

NOTE: If more entries are needed, click Add 4 Rows to get more empty rows to work with.

- 3) If there are no other details than the agent and date for each historical immunization, click **Apply Without Details**. Skip to step 7).

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

Immunization History - Detailed Data Table

Add Multiple Immunizations Record Consent **Apply Without Details** Enter Details Reset Cancel

Immunization Type:
Historical

Click a table cell to select or enter a value. Add 4 Rows

Agent	Date 1	Date 2	Date 3	Date 4
HA	2015/07/10	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
DPTP-Hib	2017/01/04	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd

- 4) If more details are known and need to be entered, click **Enter Details**.

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

Immunization History - Detailed Data Table

Add Multiple Immunizations Record Consent Apply Without Details **Enter Details** Reset Cancel

Immunization Type:
Historical

Click a table cell to select or enter a value. Add 4 Rows

Agent	Date 1	Date 2	Date 3	Date 4
HA	2015/07/10	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
DPTP-Hib	2017/01/04	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd
	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd	yyyy/mm/dd

- 5) You can Override/Set Defaults for the **Provider**, **Organization**, **Service Delivery Location** and **Information Source** you are going to enter for the Historical Immunizations. If you start typing in the **Provider**, **Organization** or **Service Delivery Location** fields an auto-search is conducted and you can select a result from the populated search results. You can also click on the magnifying glass for a pop-up search screen.

Immunization History - Detailed Data Table

Override/Set Defaults for New Immunizations Next Reset Cancel

The following default values will be used when creating immunizations within this transaction:

Provider:
e.g. Provider Last Name, First Name

Organization:
e.g. Organization Display Name

Service Delivery Location:
e.g. SDL Display Name

Information Source:
[Dropdown]

- 6) Enter any Historical Immunization details and click the **Apply & Next** button. Repeat this step for each historical immunization being added.

NOTE: When historical documentation includes partial immunization dates rather than accurate or known, select the **Estimated** checkbox beside the **Date Administered** field in the Add Immunization section. Estimated dates will display in the Detailed Data Table with an 'E' beside the

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

Add Immunization Apply & Next Remove & Next Reset Cancel

Immunization Type: Historical 1 of 2 immunizations

* Agent: DPT-Hib

* Date Administered: 2017/03/01 hh:mm CDT ☐ Estimated

Age at Administration: 6 years 7 months days

Consent Readiness: Missing

Reason for Immunization:

Information Source:

Provider: Provider, MOH

Verification Status: ☐ Requested ☒ Not Requested ☐ Completed

Organization: e.g. Organization Display Name

Service Delivery Location: e.g. SDL Display Name

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

- 7) When the last set of Historical Immunization details has been added, the updated Detailed Data Table will refresh and be visible. The **add file image** under the disk icon column indicates that the record has not been saved to the database. Click the **Save** button at the top of the Update Client Immunization Profile screen to commit the record to the database.

Update Client Immunization Profile Launch Report Add to WQ Save Reset ? log

▼ Add Single Immunization ▼ Add One or More Immunizations

Update	View	Delete	Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	BCG	2010 Jul 04	0m 2d	Valid	-1		Wound	0.05 mL
<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	DPT-Hib	2017 Mar 01	6y 7m					
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	DTaP-IPV	2014 Jul 16	4y 0m	Valid	-1		Left arm	0.5 mL
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	DTaP-IPV-Hib	2010 Nov 03	4m 1d	Valid	-1		Right Leg	0.5 mL
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	DTaP-IPV-Hib	2011 Jan 26	6m 24d	Valid	-1		Right Leg	0.5 mL

Deferrals

A deferral is created when a condition or situation exists that prevents the client from receiving a scheduled immunization (for a specific immunizing agent and dose). Recording a deferral indicates to other clinicians why an immunization was not administered at the recommended time. The client will continue to be forecast for the immunizing agent that is deferred. The deferral will remain on the client record until the deferral end date is reached.

IMPORTANT: A deferral does not affect the client's immunization forecast. If the client's wishes are to be exempt from the immunization for personal reasons, then the appropriate policy and procedures should be followed, and an Exemption should be applied for that immunizing agent through the Special Considerations screen.

PRE-REQUISITES:

- ✓ A Client has been placed into context.

Record a Deferral

- 1) Select **Immunizations > Deferrals** from the Left-Hand Navigation (LHN).
The Update Deferrals Screen displays. View any existing deferrals from the table below.

TIP: If an error is made before the Deferral is saved, click the **Reset** button from the top of the screen to remove all values and start again.

The screenshot shows the 'Update Deferrals' screen. On the left is a navigation menu with options like 'Recent Work', 'Client', 'Cohort', 'Immunizations', 'Immunization Profile', 'Special Considerations', 'Adverse Events (AEFI)', 'Deferrals', 'Search Mass Imms Event', 'TB Skin Test Summary', and 'Mass TB Event Summary'. The 'Deferrals' option is selected. The main area is titled 'Update Deferrals' and includes buttons for 'Add to WQ', 'Save', 'Reset', and a help icon. Below the title, client information is displayed: Client ID: 5671, Name: ADESINA, WILMA / Female, Health Card No: 866678620, Date of Birth / Age: 2010 Jul 02 / 6 years 8 months. Below this, a 'Deferrals' table is shown with columns: Immunizing Agent, Reason, Created By, Effective From, and Effective To. The table contains one entry: MMR-Var, IT disruption, Training, User M Dr, 2017 Mar 01, 2017 Mar 05. At the bottom of the table, it says 'Total: 1'. An 'Add' button is located at the top right of the table area.

- 2) To create a new Deferral, click **Add**.
The Add Deferrals section displays.

Update Deferrals Add to WQ Save Reset ? log

Active

Client ID: 5671 Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555(Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Deferrals

Add Deferrals Apply Reset Cancel

* Immunizing Agent: * Reason:

* Effective From: To:

yyyy/mm/dd yyyy/mm/dd

To create a new record click Add. Add

3) Complete all required fields in the Add Deferrals section.

- Select the **Immunizing Agent** from the drop-list.
- Select the **Reason** from the drop-list.
- Enter the **Effective From** date in the calendar field.

4) Click **Apply**.

The Update Deferrals screen will appear, and the newly created deferral is listed in the data table, as shown below.

Update Deferrals Add to WQ Save Reset ? log

Active

Client ID: 5671 Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555(Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Deferrals

Update Delete Add

	Immunizing Agent	Reason	Created By	Effective From	Effective To
	MMR-Var	Parent/Guardian/Client Deferral	Training, User M Dr	2015 Sep 07	2015 Sep 13

Total: 1 1 10

5) The **add file image** under the disk icon column indicates the record has not been saved to the database. Click the **Save** button at the top of the Update Referrals screen to commit the record to the database.

After saving, the Update Deferrals screen is re-displayed and the disk icon has been removed.

Update Deferrals Add to WQ Save Reset ? log

Client ID: 5671 Name (Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555 (Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Deferrals

Update Delete Add

	Immunizing Agent	Reason	Created By	Effective From	Effective To
<input type="radio"/>	MMR-Var	Parent/Guardian/Client Deferral	Training, User M Dr	2015 Sep 07	2015 Sep 13

Total: 1 1 10

End-Date a Deferral

The Deferral “Effective To” date may need to be updated if the deferral is no longer relevant.

- Click the radio button beside the deferral that is being updated and click the **Update** button.

Update Deferrals Add to WQ Save Reset ? log

Client ID: 5671 Name (Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555 (Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Deferrals

Update Delete Add

	Immunizing Agent	Reason	Created By	Effective From	Effective To
<input checked="" type="radio"/>	MMR-Var	Parent/Guardian/Client Deferral	Training, User M Dr	2015 Sep 07	2015 Sep 13

Total: 1 1 10

The Update Deferrals section displays with the details of the selected deferral.


- Update the **Effective To** date to the appropriate end-date. If an immunization with this agent has already been recorded against the client’s record, the date entered in the **Effective To** field must be before the date the client was vaccinated.

NOTE: Only the **Effective To** date can be updated on an existing deferral.

- Click **Apply** to save the new effective date.

Update Deferrals Add to WQ Save Reset ? log print

Active

Client ID: 5671  Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-6666(Workplace) Jurisdiction Info: Prince Albert Grand Council (PAGC),Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -


Deferrals ↑

Update Deferrals Apply Reset Cancel

* Immunizing Agent: MMR-Var * Reason: Parent/Guardian/Client Defer...

* Effective From: 2015/09/07 To: 2015/09/13

Update Delete Add

	Immunizing Agent	Reason	Created By	Effective From	Effective To
	MMR-Var	Parent/Guardian/Client Deferral	Training, User M Dr	2015 Sep 07	2015 Sep 13

Total: 1 1 10

The Update Deferrals screen is displayed, and the newly updated deferral is listed in the data table, as shown below.

Update Deferrals Add to WQ Save Reset ? log print

Active

Client ID: 5671  Name(Last, First Middle)/Gender: ADESINA, WILMA / Female Health Card No: 866678620 Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-5555(Primary home) Jurisdiction Info: Prince Albert Grand Council (PAGC),Red Earth Additional ID Type / Additional ID: Provincial health service provider identifier / -

Deferrals ↑

Update Delete Add

	Immunizing Agent	Reason	Created By	Effective From	Effective To
	MMR-Var	Parent/Guardian/Client Deferral	Training, User M Dr	2015 Sep 07	2015 Sep 21

Total: 1 1 10

- 9) The **pencil icon** under the disk icon column indicates that the update has not been saved to the database. Click the **Save** button at the top of the Update Deferrals screen.

Immunization Profile Report

PRE-REQUISITES:

- ✓ A Client has been placed into context.

View the Client's Immunization Profile Report

- 1) From the Left-Hand Navigation, select **Immunizations > Immunization Profile**.
The Update Client Immunization Profile screen will appear.

Update Client Immunization Profile

Client ID: 5671 | Name (Last, First Middle)/Gender: ADESINA, WILMA / Female | Health Card No: 866678620 | Date of Birth / Age: 2010 Jul 02 / 6 years 8 months

Phone Number: (306)-555-6666 (Workplace) | Jurisdiction Info: Prince Albert Grand Council (PAGC), Red Earth | Additional ID Type / Additional ID: Provincial health service provider identifier / -

Immunization Details

Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
BCG	2010 Jul 04 (R)					

- 2) Click the **Launch Report** button.
- 3) Select the report to generate from the drop-down list and click **Confirm**. The Client Profile Report will be listed as IR6800.

Immunization Details

Immunization History - Summary Grid

Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
BCG	2010 Jul 04 (R)					
DTaP-IPV	2014 Jul 16 (R)					
DTaP-IPV-Hib	2010 Nov 03 (R)	2011				
HA	2011 Jul 19 (R)	2012				
Inf	2013 Nov 07 (R)					
Men-C-unspecified	2011 Jul 19 (R)					
MMR-Var	2011 Jul 19 (R)	2012 Mar 12 (R)				

Launch Report

* Report: IR6800

Confirm

- 4) The Report Filters tab will open. Select the appropriate report filters as required from the drop lists and click **Generate Report** to run the report.

Report Filters

* Required field

Report Filters: IR6800-Client Immunization Record

Hide Report Filters

* Report Output ☒ PDF (Supported Format)

* Client ID

* Exclude Confidential Address/Phone Information

* Include Immunization Forecast

* Include Invalid Immunizations Summary

* Include Deferrals

* Include Special Considerations

* Include Adverse Events

* Include Allergies

* Language

Generate Report

Close

- 5) The report will execute, download and open in a PDF reader. The output will depend on the report filters selected in the previous step.

Where Created: Saskatchewan

PANORAMA

Client Immunization Profile Record

Report as of Date / Time: 2017 Mar 15 / 17:09 Next Immunization Date: Overdue

Personal Information			
Client ID	5671	Health Card Number	866678620
Client Name	ADESINA, WILMA	Gender	Female
Date of Birth	2010 Jul 02		

Immunization History	Based on our records, WILMA ADESINA has received the following immunizations			
Immunizing Agent	Immunization Date			
BCG Bacillus Calmette-Guérin	2010 Jul 04			
DTaP-IPV Diphtheria-Tetanus-acellular Pertussis-inactivated Polio	2014 Jul 16			
DTaP-IPV-Hib Diphtheria-Tetanus-acellular Pertussis-inactivated Polio-Haemophilus influenzae type b	2010 Nov 03	2011 Jan 26	2011 Mar 30	2012 Mar 12
HA Hepatitis A	2011 Jul 19	2012 Mar 12		
Inf Influenza, injectable	2013 Nov 07			
Men-C-unspecified Meningococcal Conjugate, unspecified	2011 Jul 19			

NOTE: This report can also be accessed from the Left-Hand Navigation under **Reporting and Analysis > Standard Reports**. Open the Immunization section. Click on the **Client Immunization Record** hyperlink to open the report. Not all users will have access to the Reporting and Analysis screens.

Immunization Defaults

Setting up immunization defaults in advance will streamline data entry of immunization events in Panorama. However, it is also important to remove defaults once they are no longer valid, to reduce the chance of recording incorrect information.

Update Immunization Defaults

- 1) From the Left-Hand Navigation, select **Administration > Imms Defaults**.
The Update Immunization Defaults screen is displayed.

- 2) Make appropriate updates to the General Immunization Defaults section and click **Save**.

NOTE: Only check the Yes button for **Apply defaults to Historical Immunizations** if you wish to apply all your defaults settings to Historical as well as Administered Vaccines.

Update Anatomical Admin Site Defaults

- 3) To make changes to an existing **Anatomical Admin Site Defaults** record, click the radio button next to the record and click **Update**.

	Immunizing Agent	Anatomical Site	Min Age	Max Age
<input checked="" type="radio"/>	DTaP	Left arm		
<input type="radio"/>	Men-C-C	Left arm		

Total: 2

- 4) Make required changes to the **Anatomical Site**, **Minimum Age** or **Maximum Age** fields and click the **Apply** button when complete.

Update Anatomical Admin Site Defaults

* Immunizing Agent: DTaP

* Anatomical Site: Left arm

Minimum Age (Months):

Maximum Age (Months):

Buttons: Update, Delete, Add, Apply, Reset, Cancel

- 5) The **pencil icon** under the disk icon column indicates that the update has not been saved to the database. Click the **Save** button at the top of the Update Immunization Defaults screen to save the changes.

Update Immunization Defaults Save Reset ? log Print

General Immunization Defaults

Provider: Info Search

Organization: Info Search

Service Delivery Location: Info Search

Holding Point Name:

Apply defaults to Historical Immunizations: ☐ Yes ☒ No

Holding Point Location:

Anatomical Admin Site Defaults

Update Delete Add

	Immunizing Agent ^	Anatomical Site ^	Min Age ^	Max Age ^
<input checked="" type="radio"/>	DTaP	Left Leg		
<input type="radio"/>	Men-C-C	Left arm		

Total: 2 1 10

The saved record will be displayed.

Anatomical Admin Site Defaults Info Up

Update Delete Add

	Immunizing Agent ^	Anatomical Site ^	Min Age ^	Max Age ^
<input type="radio"/>	DTaP	Left Leg		
<input type="radio"/>	Men-C-C	Left arm		

Total: 2 1 10

Add an Anatomical Site Admin Default

- To Add an Anatomical Admin Site Defaults record, click the **Add** button in the Anatomical Admin Site Defaults section.

Anatomical Admin Site Defaults Info Up

Update Delete Add

	Immunizing Agent ^	Anatomical Site ^	Min Age ^	Max Age ^
<input type="radio"/>	DTaP	Left Leg		
<input type="radio"/>	Men-C-C	Left arm		

Total: 2 1 10

The Add Anatomical Admin Site Defaults section will appear.

- 7) Complete all required fields in the Add Anatomical Admin Site Defaults section and click the **Apply** button.

Anatomical Admin Site Defaults

Add Anatomical Admin Site Defaults Apply Reset Cancel

* Immunizing Agent:

* Anatomical Site:

Minimum Age (Months):

Maximum Age (Months):

Add

- 8) The **add document icon** under the disk icon column indicates that the update has not been saved to the database. Click the **Save** button at the top of the Update Immunization Defaults screen to save the changes.

Update Immunization Defaults Save Reset ? log

General Immunization Defaults

Provider: i Q

Organization: i Q

Service Delivery Location: i Q

Holding Point Name:

Apply defaults to Historical Immunizations: ☐ Yes ☒ No

Holding Point Location:

Anatomical Admin Site Defaults Add

Update Delete

	Immunizing Agent	Anatomical Site	Min Age	Max Age
<input type="radio"/>	DTaP	Left Leg		
<input checked="" type="radio"/>	HA	Right Leg		
<input type="radio"/>	Men-C-C	Left arm		

Total: 3 1 10

The saved record will be displayed in the data table.

Anatomical Admin Site Defaults Add

Update Delete

	Immunizing Agent	Anatomical Site	Min Age	Max Age
<input type="radio"/>	DTaP	Right arm		
<input type="radio"/>	HA	Right Leg		
<input type="radio"/>	Men-C-C	Left arm		

Delete an Anatomical Site Admin Default

- 9) To delete an Anatomical Admin Site Default record, click the radio button next to the record to be deleted, and then click the **Delete** button.

	Immunizing Agent	Anatomical Site	Min Age	Max Age
<input type="radio"/>	DTaP	Right arm		
<input checked="" type="radio"/>	HA	Right Leg		
<input type="radio"/>	Men-C-C	Left arm		

Total: 3

A Confirmation window will popup. Click **Confirm** to make the deletion.

- 10) The **trash can icon** under the disk icon column indicates that the deletion has not been saved to the database. Click the **Save** button at the top of the Update Immunization Defaults screen to commit the deletion.

Update Immunization Defaults

Provider: Provider, MOH

Organization: Regina Qu'Appelle RHA, Regina, Saskatchewan

Service Delivery Location: Regina Central Public Health Office, Regina, Saskatchewan

Holding Point Name: Regina Central Public Health Office

Apply defaults to Historical Immunizations: ☐ Yes ☒ No

Holding Point Location: ReginaCentralPHO.A

Anatomical Admin Site Defaults

	Immunizing Agent	Anatomical Site	Min Age	Max Age
<input type="radio"/>	DTaP	Left Leg		
<input checked="" type="radio"/>	HA	Right Leg		
<input type="radio"/>	Men-C-C	Left arm		

Add Immunization Agent Lot Number Defaults

11) To add an Immunization Agent Lot Number Default record, click the **Add** button.

Immunization Agent Lot Number Defaults

To create a new record click Add.

Add

12) Complete the required fields and click the **Apply** button.

Immunization Agent Lot Number Defaults

Add Immunization Agent Lot Number Defaults

Apply Reset Cancel

* Immunizing Agent: HB

* Lot Number: AHBVC310AG - Exp. 2025 Oct 31

Display Expired and Recalled Lots

Show All Publicly Funded Non-Publicly Funded

Manufacturer: A.R. MEDICOM INC.
Trade Name: ENGERIX ADULT
Dosage: 1 mL
Route: Intramuscular
Publicly Funded: Yes
Quantity on hand: 999994.0

To create a new record click Add.

Add

13) The **add icon** under the disk icon column indicates that the new record has not been saved to the database. Click the **Save** button at the top of the Update Immunization Defaults screen to save the changes.

Update Immunization Defaults

Save Reset ? log

Regina Central Public Health Office ReginaCentralPHO.A

Anatomical Admin Site Defaults

Add

Update Delete

	Immunizing Agent	Anatomical Site	Min Age	Max Age
	DTaP	Left Leg		
	Men-C-C	Left arm		

Total: 2

1 10

Immunization Agent Lot Number Defaults

Add

Update Delete

	Immunizing Agent	Lot Number
	HB	AHBVC310AG

Total: 1

1 10