eHealth Saskatchewan

PANORAMA

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

Table of contents

A. Introduction **4**

B. Steps to add historical immunization **7**

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:

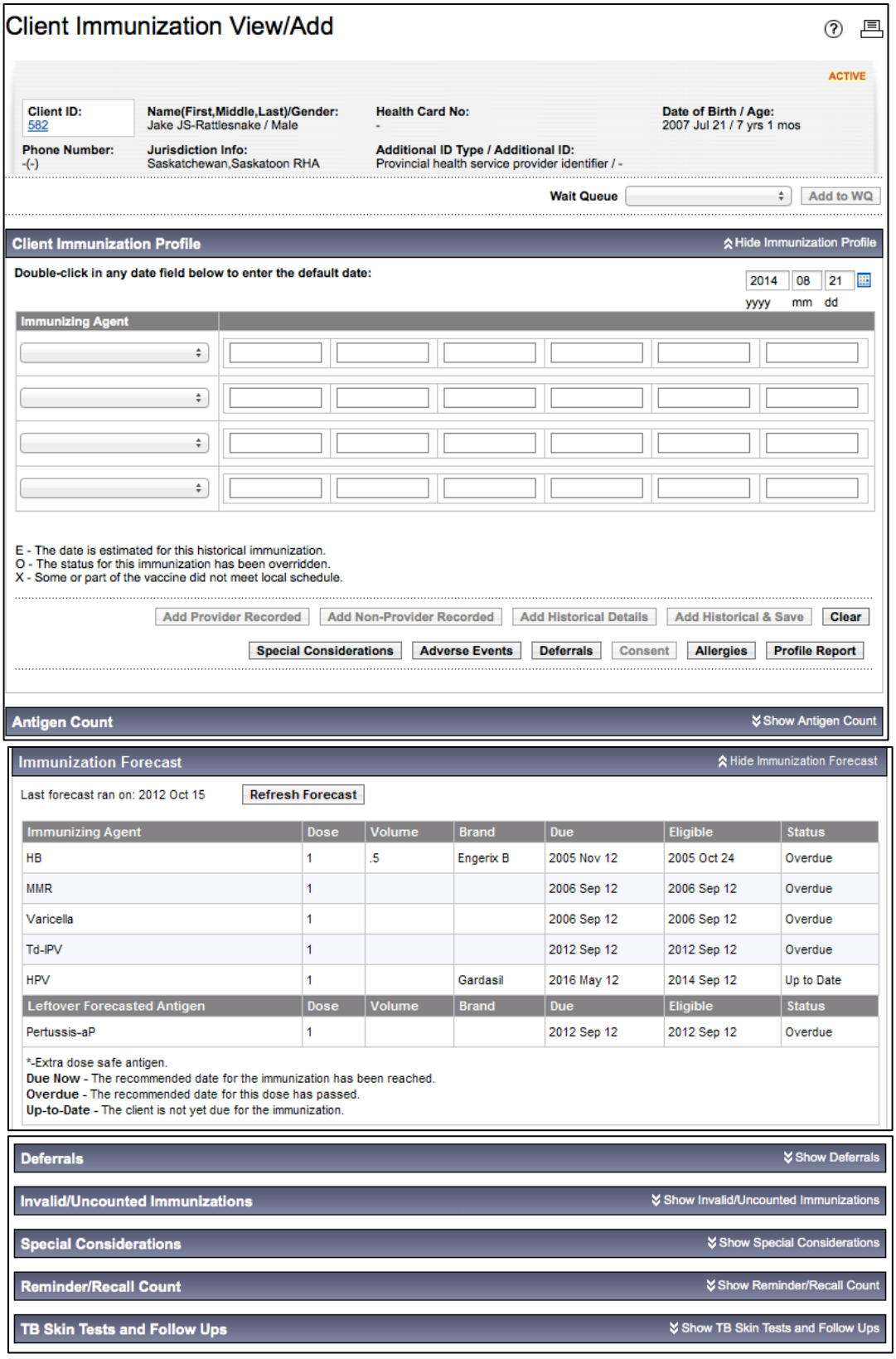
Administer Immunizations, View Client Immunization Profile, Search Client, and Panorama 101.

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.

CLIENT IMMUNIZATION VIEW/ADD SCREEN

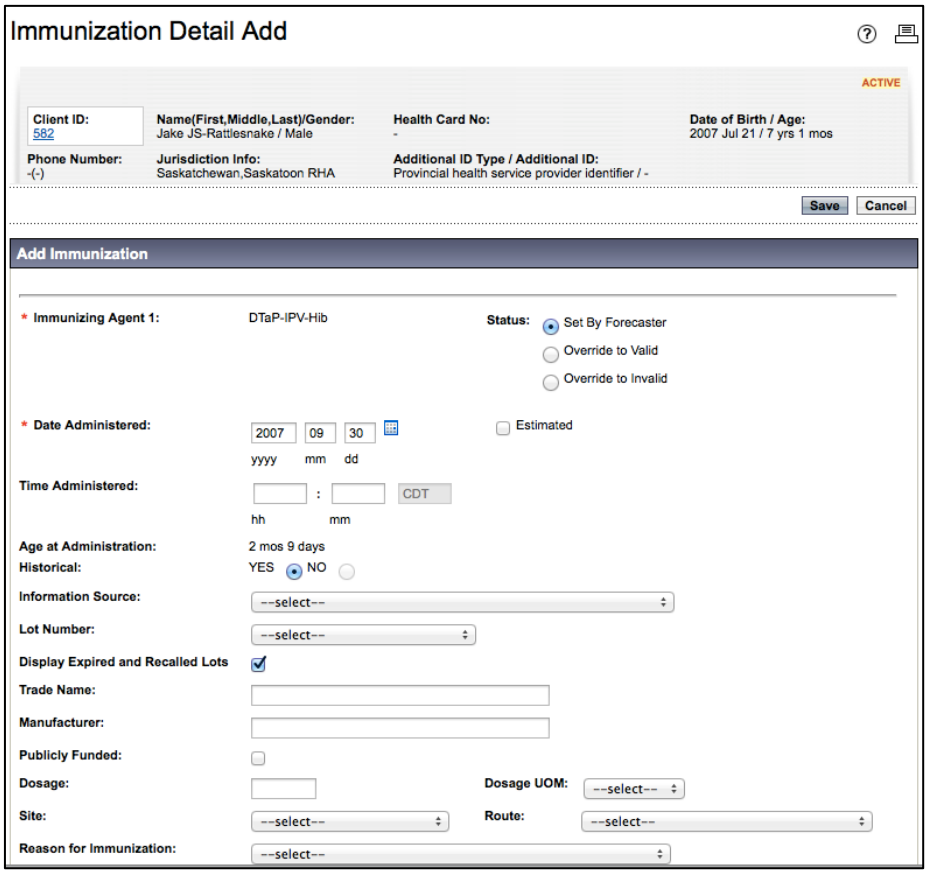


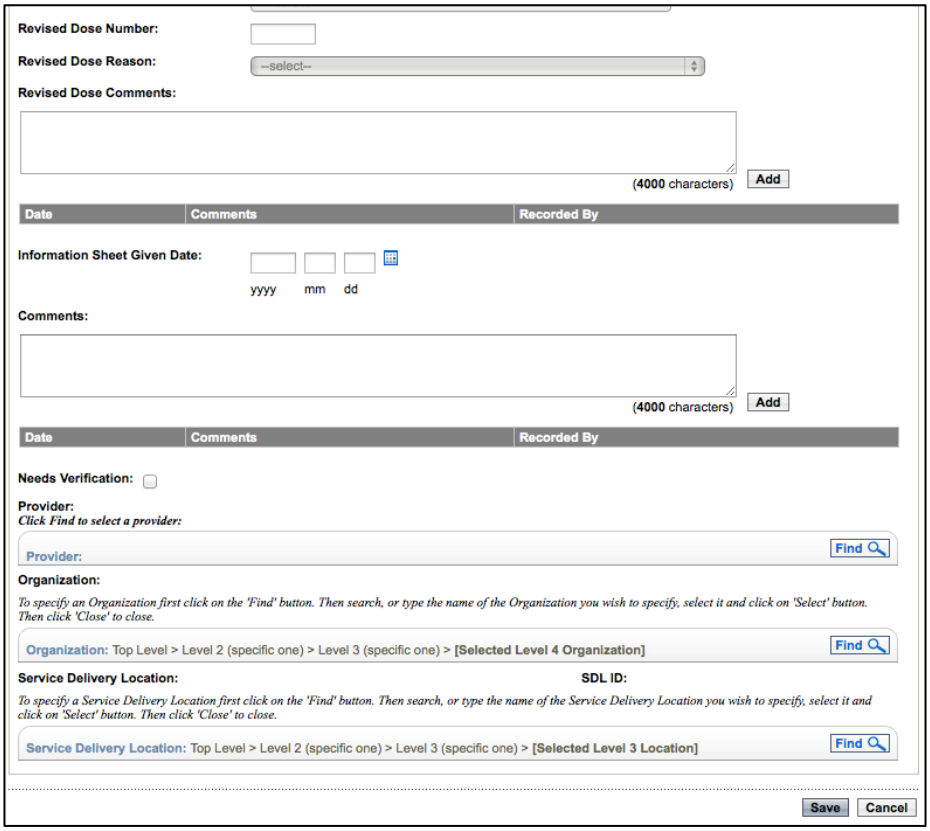
NOTE: The CLIENT IMMUNIZATION VIEW/ADD screen includes a summary view of the client's immunization history, the antigen count (count of doses administered by antigen), immunization forecast, deferrals, invalid immunizations, special considerations, reminder/recall count, and a summary of TB skin tests.

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.

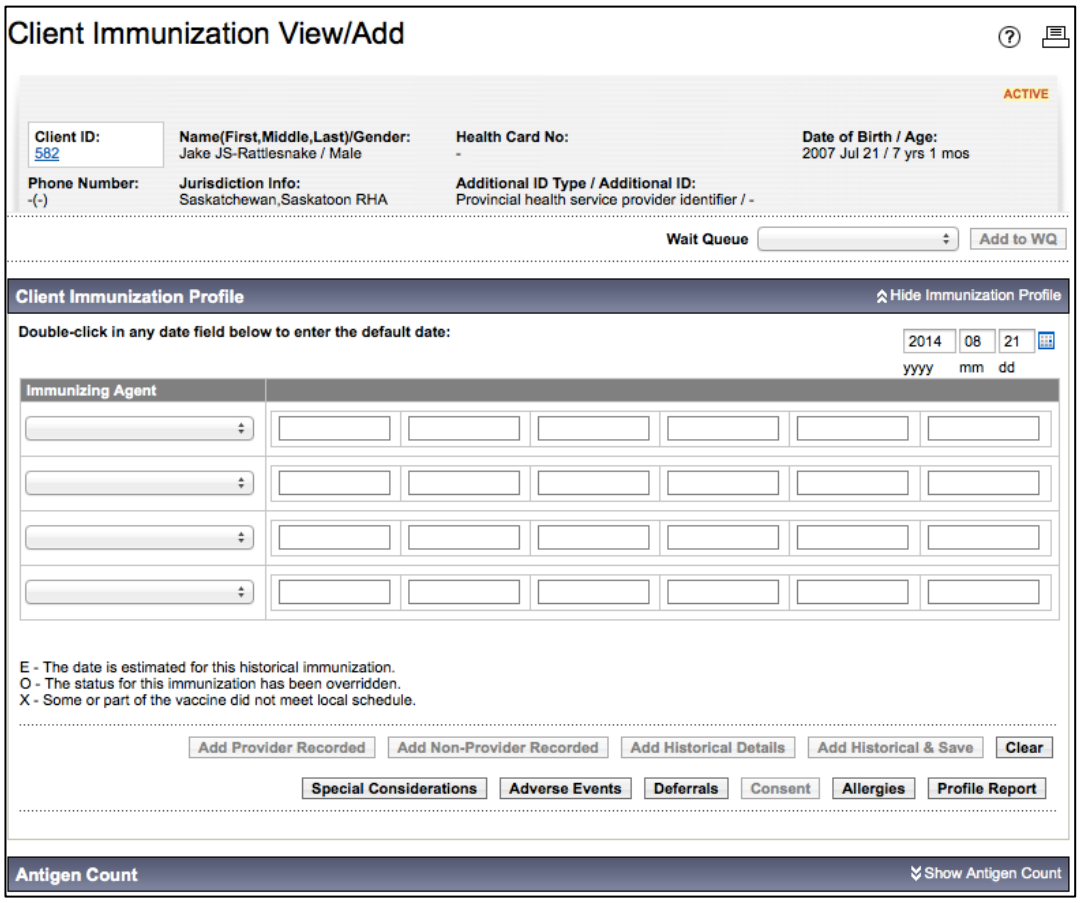
NOTE: The Historical Immunization flag must be set to YES in the PERSONAL SETTINGS screen for the user defaults for ORG and SDL to auto populate while recording Historical Immunization. Any default values may be overridden.





B. Steps to add historical immunization

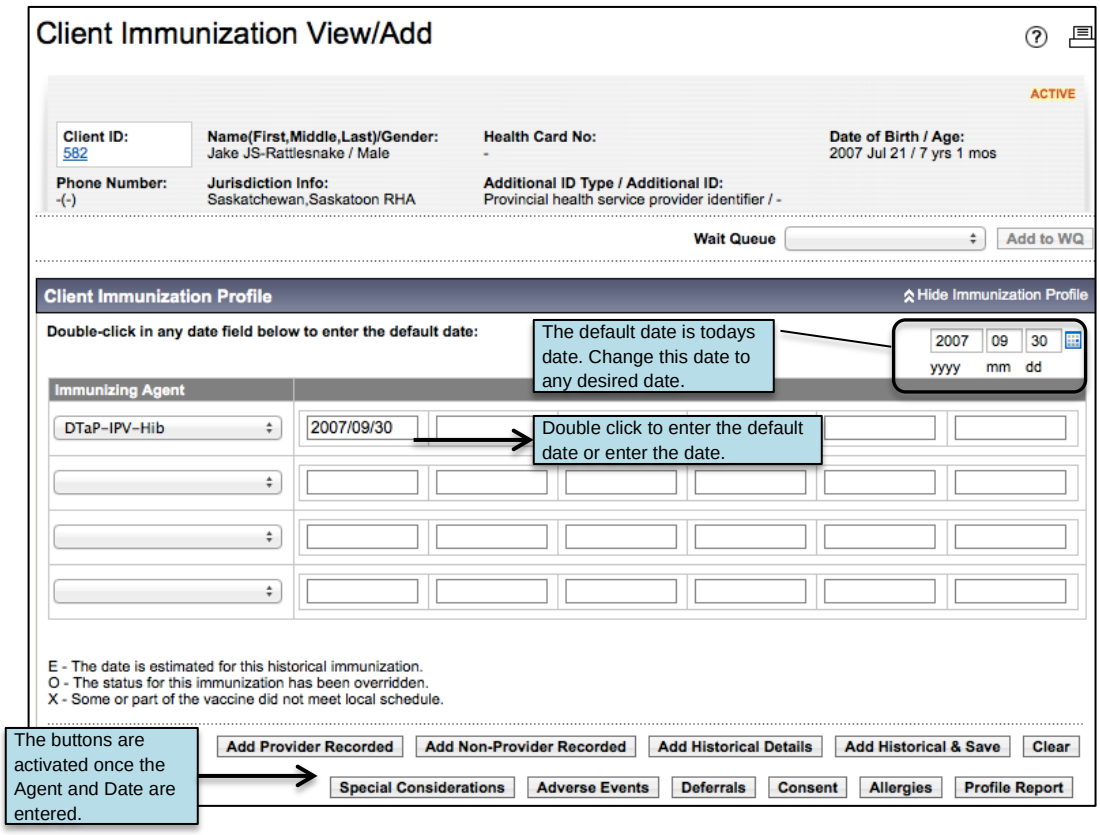
1. Select IMMUNIZATIONS > RECORD & UPDATE IMMS from the left hand navigation. The CLIENT IMMUNIZATION VIEW/ADD screen displays.



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

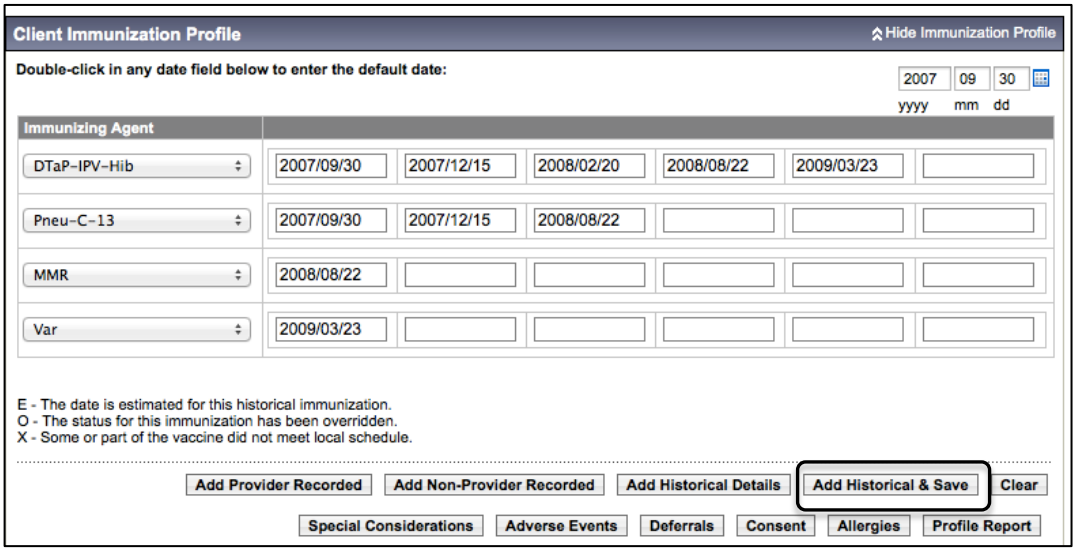
TIP: If entering a seventh or subsequent immunization for the same agent for a client, select the agent from the drop-down on a new row, and enter dates as per usual. All immunizations for one agent will be displayed together once saved.

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



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.

3. 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).



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.

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.

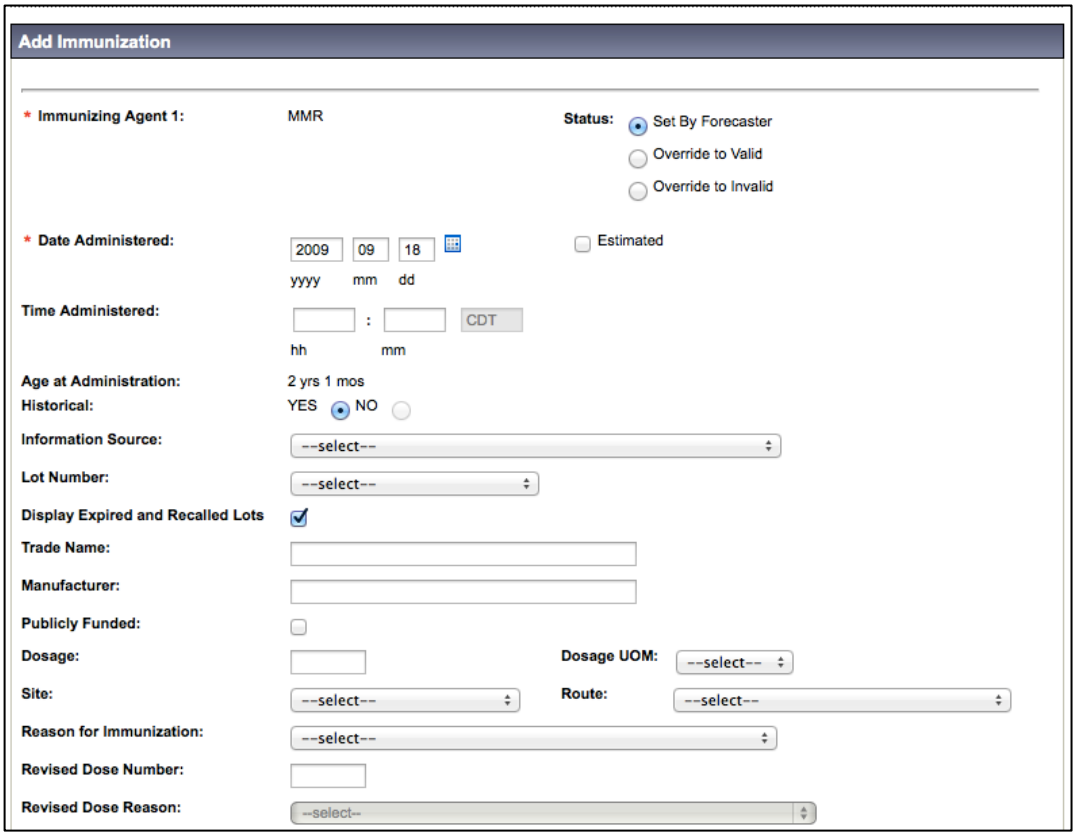
The system makes available all action buttons below the Client Immunization Profile summary table.

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.

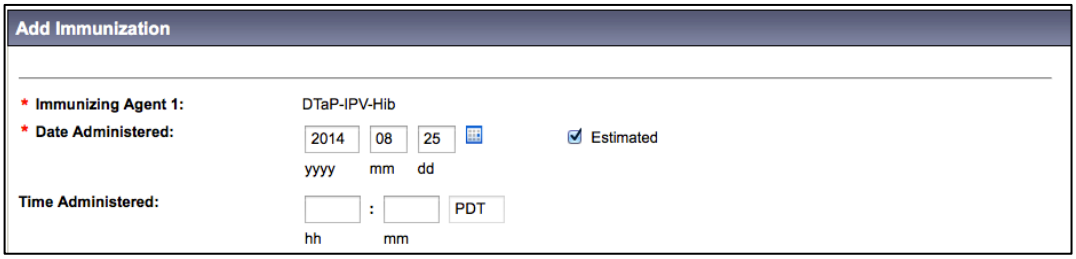
Note: When historical documentation includes partial immunization dates dates rather than accurate or known, select the **Estimated** checkbox beside the Date Administered field in the Add Immunization details page. Enter the Year of birth and the Month and Day where known; use "01" to replace where 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.

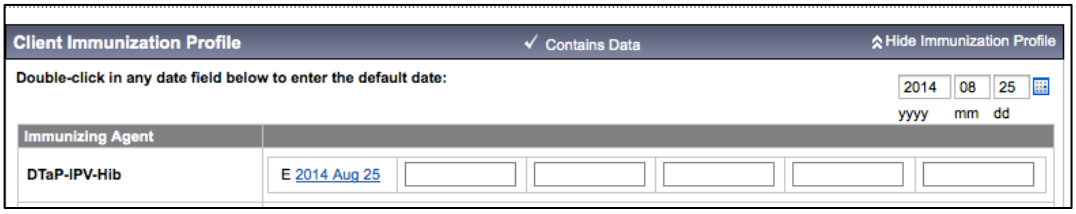
5. Enter any available pertinent information regarding the historical immunization.



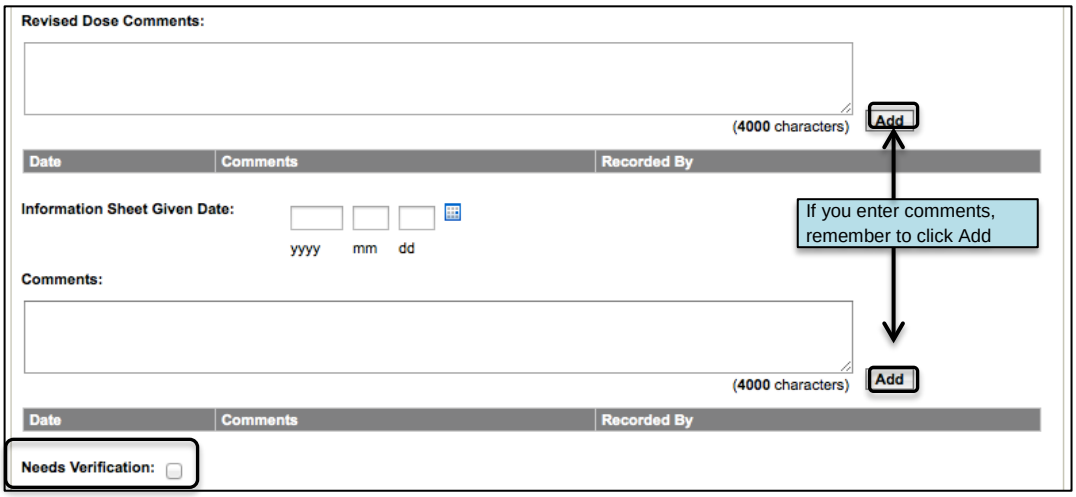
NOTE: You can indicate the Date for a Historical Immunization event as Estimated by selecting the Estimated check box. Estimated dates will display on the Immunization summary screen prefaced by an E next to the Date.



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



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



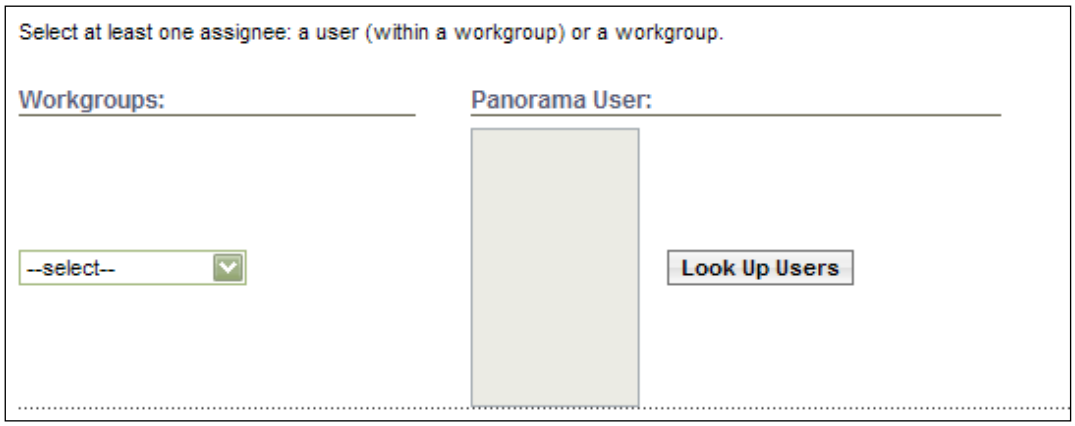
7. To enter COMMENTS, enter the comments and click ADD.

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.

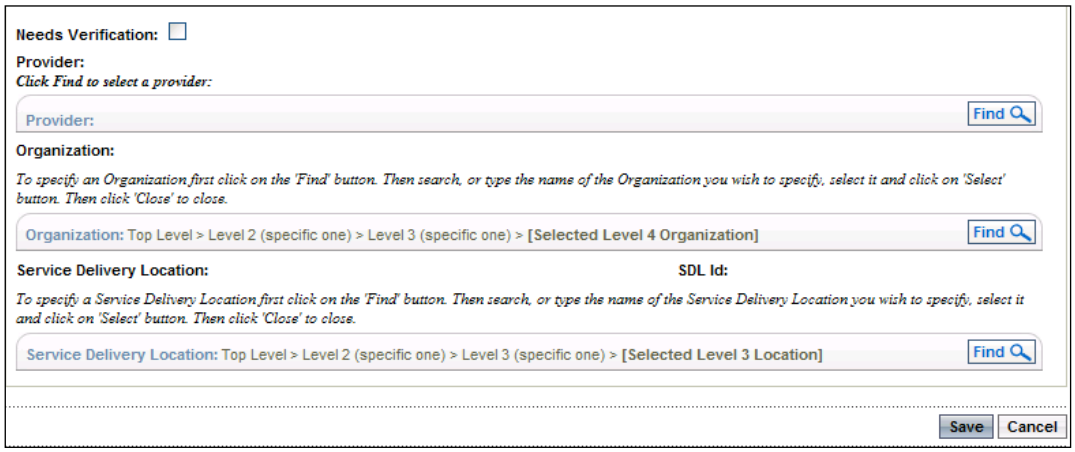
Note: Saskatchewan is not currently implementing Needs Verification functionality – it may be included in a future release.

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



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

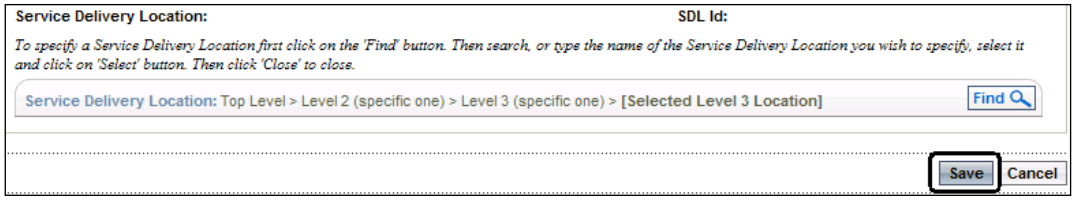
NOTE: Make sure the IMMUNIZATION USER DEFAULT settings are set for the user to expedite data entry if required. If the Historical Immunization flag is set to YES then the ORG and SDL fields will auto populate – be sure that no other information is defaulted incorrectly such as Lot Number.



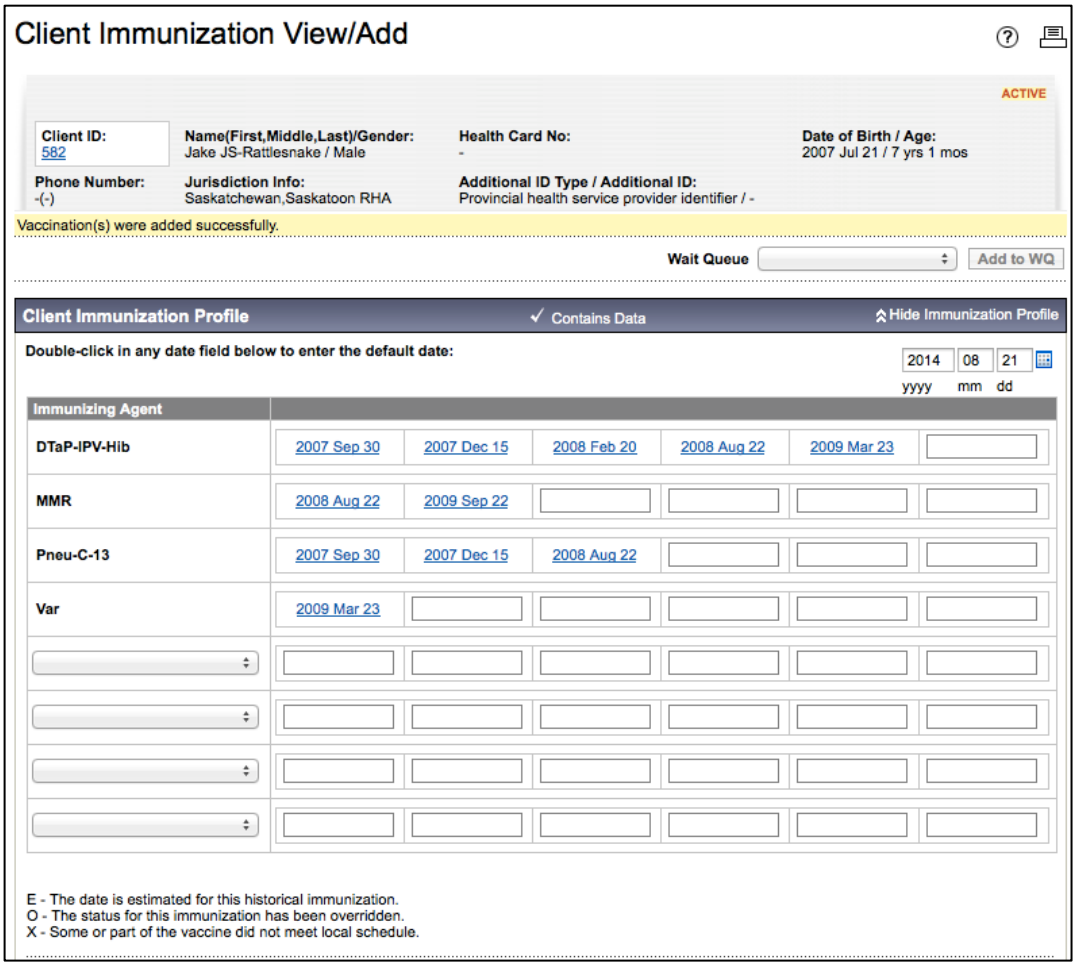
10. Select an ORGANIZATION if known, using the FIND button.

11. Select a SERVICE DELIVERY LOCATION if known, using the FIND button.

12. Click SAVE.



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



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.

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: Immunization Forecast section is updated to reflect historical immunizations.

The ANTIGEN COUNT is updated to reflect the immunizations added.

Antigen Count ✓ Contains Data Hide Antigen Count

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).

Immunization Forecast (by Agent) Hide Immunization 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

* - Extra dose safe antigen.
M - Indicates a mix of different antigen dose numbers within the Agent.
Due - The recommended date for the immunization has been reached.
Overdue - The recommended date for this dose has passed.
Up to Date - The client is not yet due for the immunization.
Eligible - The client has reached or is past the eligibility date, but is not yet due for the Immunization.

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

Invalid/Uncounted Immunizations ✓ Contains Data Hide Invalid/Uncounted Immunizations

Some or part of these vaccines did not meet local schedule.

Invalid/Uncounted Immunizations	Date of Immunization	Invalid/Uncounted Antigens	Reason
Var	2009 Mar 26		Administered Outside Recommended Schedule or Practice