



## **P16-0371 Panorama Project**

# **Panorama Immunization Management User Manual**

## **SCHOOL IMMUNIZER ROLE**

Version 1.0

Dated: 2018-02-09



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## 1 PURPOSE

The purpose of this course is to present the Panorama system specifically for nurses that will only be conducting school immunizations. This document selectively combines content from several courses that provide complete Panorama training for users in Nova Scotia.

After completing the course, School Immunizers users should be able to:

- Login/Logout of the system
- Navigate the system screens
- Use the most common fields and screen buttons
- Set user defaults
- Search for Mass Immunization Events
- Use Mass Immunization Worksheets to:
  - view the consent,
  - assess the client information including immunization history, allergies, warnings, clinical Notes, and special Considerations
  - record immunizations
  - record the client event status

Note:

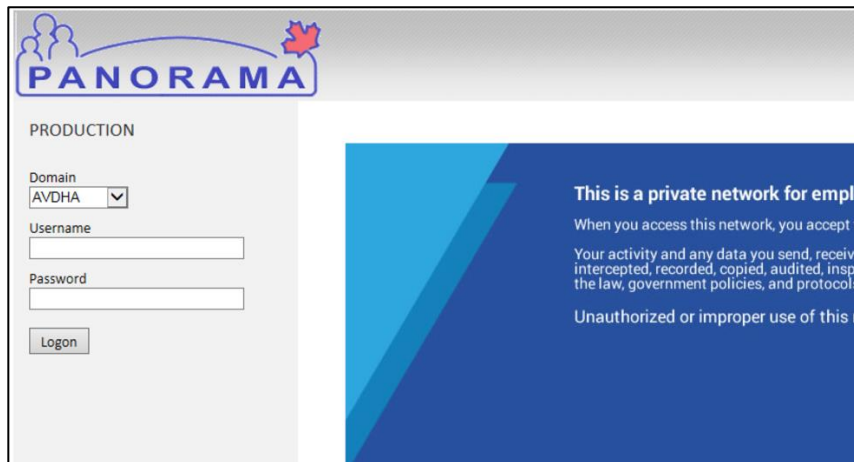
School Immunizer training is limited to the Mass Immunization Worksheet and working with the worksheet.

## 2 USER LOGIN

Each registered user on Panorama will have use their NSHA username and password.

Before a user can begin using Panorama, a user must login into Panorama. Below are the steps outlined for registered users to login into Panorama.

1. When working off-site, you must access Panorama through a Virtual Private Network (VPN) connection. The VPN product for NSHA is Global Protect. This is integrated into your login and no action is required by you to enable Global Protect.
2. Log into Panorama by opening the web browser and entering the URL provided by the Panorama Team.
3. Select your domain. Enter **Username** and **Password**.



4. Select the appropriate role assigned to username. Click **OK**.

Roles are used by Panorama to define what users are authorized to view and perform while they are working with Panorama. A user may be provided with one or more roles, depending on the nature of the work and the responsibilities involved. A user may be assigned one or more Roles when they are registered to use the system.



### **Tip: Multiple Roles**

*For those users with multiple roles, expand the Role drop-down list and select the correct role. Point your mouse pointer slowly to the name of the role you are about to select to ensure you are selecting the correct role for the organization you are supporting today. The full name of the Role and the Organization will be displayed in a yellow message box.*

## Login / Ouverture de session

**\* Required Field / Information Requise**

Specify your Organization, Role and Language preference / Indiquer votre Organisation, rôle et langue préférée

**\* Organization/Organisation:** Nova Scotia Health Authority

**\* Role/Rôle:** NS\_IMMS\_CLERK  
superuser  
NS\_MOH  
NS\_IMMS\_NURSE

**\* Language/Langue:**

[Continue/Continuer](#)

Once you press continue, you will be presented with the Panorama Dashboard

**PANORAMA** PNS UAT  
Public Health Solution for Disease Surveillance and Management

IMMUNIZATION

The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

Specify your Service Delivery Location (SDL).

**\* Service Delivery Location:** Halifax PHO [Select](#)

SDL Time Zone: AST

**Personal WorkLoads**  
View all your assigned work tasks

**Reporting**  
Specify and view client specific and aggregate reports.

**Document Management**  
Add, update, delete and search for electronically attached documents.

**Notifications**  
Create and view jurisdiction and threshold notifications.

## 3 NAVIGATE IN PANORAMA

Navigating around Panorama allows the User to access certain functionality across the system. This includes:

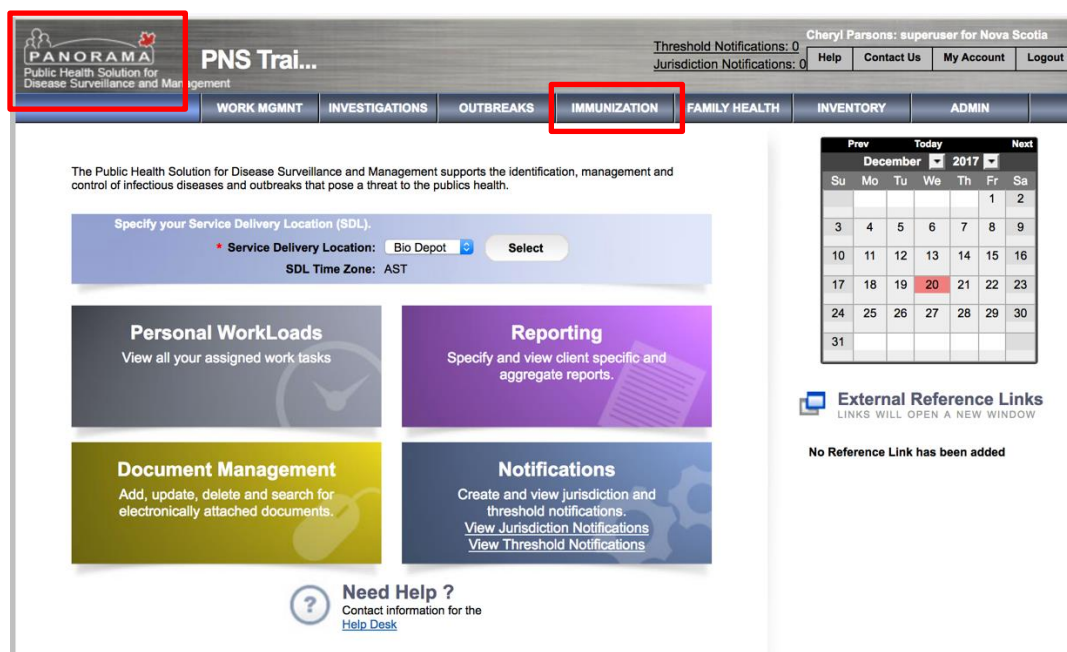
- Panorama Dashboard
- Using the Left-Hand Navigation
- Accessing Recent Work
- Using the Back Button
- Common Panorama Functions

### 3.1 Panorama Dashboard

The **Dashboard** page is the first page a user will see upon a successful login to Panorama. This page is accessible from anywhere in Panorama by clicking on the Panorama logo in the upper left-hand corner of any screen.

The **Dashboard** does not contain client information; therefore, it can be used as a “clean” page to quickly bring forward when someone else is present. Keep in mind that if you are in the middle of a transaction, you will lose your work if you do not save before clicking the logo.

To start working with client data, a user needs to click the **Immunization** tab in the top navigation bar.



**PANORAMA**  
Public Health Solution for Disease Surveillance and Management

PNS Trai...

Cheryl Parsons: superuser for Nova Scotia

Threshold Notifications: 0  
Jurisdiction Notifications: 0

Help Contact Us My Account Logout

WORK MGMT INVESTIGATIONS OUTBREAKS **IMMUNIZATION** FAMILY HEALTH INVENTORY ADMIN

The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

Specify your Service Delivery Location (SDL).

\* Service Delivery Location: Bio Depot Select

SDL Time Zone: AST

**Personal WorkLoads**  
View all your assigned work tasks

**Reporting**  
Specify and view client specific and aggregate reports.

**Document Management**  
Add, update, delete and search for electronically attached documents.

**Notifications**  
Create and view jurisdiction and threshold notifications.  
[View Jurisdiction Notifications](#)  
[View Threshold Notifications](#)

**External Reference Links**  
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

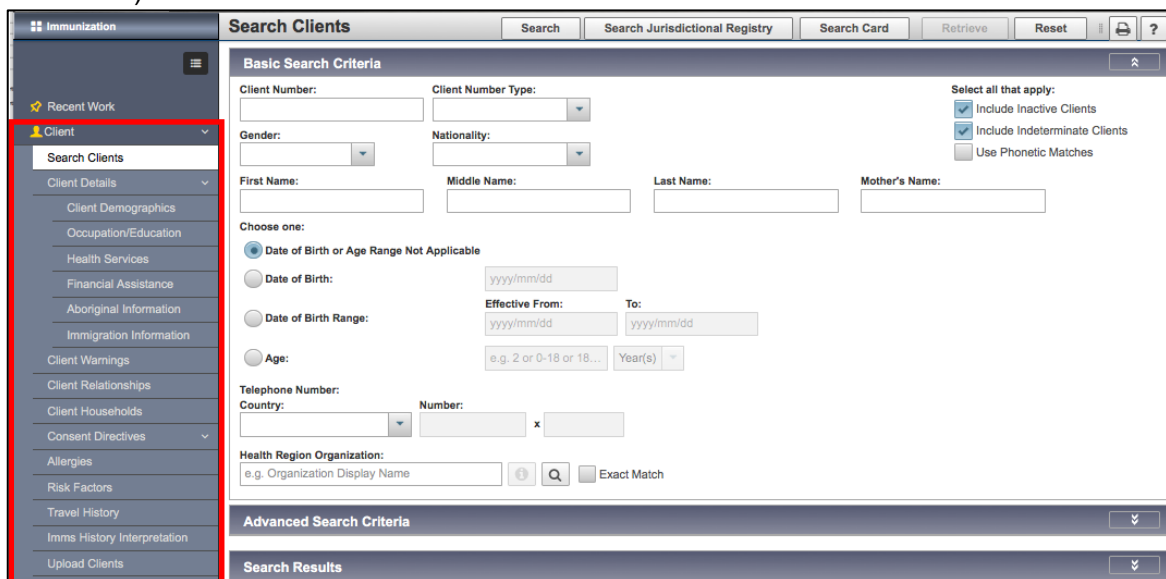
**Need Help ?**  
Contact information for the [Help Desk](#)



## 3.2 Left-Hand Navigation

The **Left-Hand Navigation** menu bar allows users to easily move between Panorama screens. To access a screen, move your mouse pointer to the name of the Panorama function you need to access.

Some functions are grouped in categories. To see what functions are available within a group, click the arrow next to the name of the primary function (e.g., Client). The menu will expand and display additional functions available (e.g., Immunization Service and All Services).

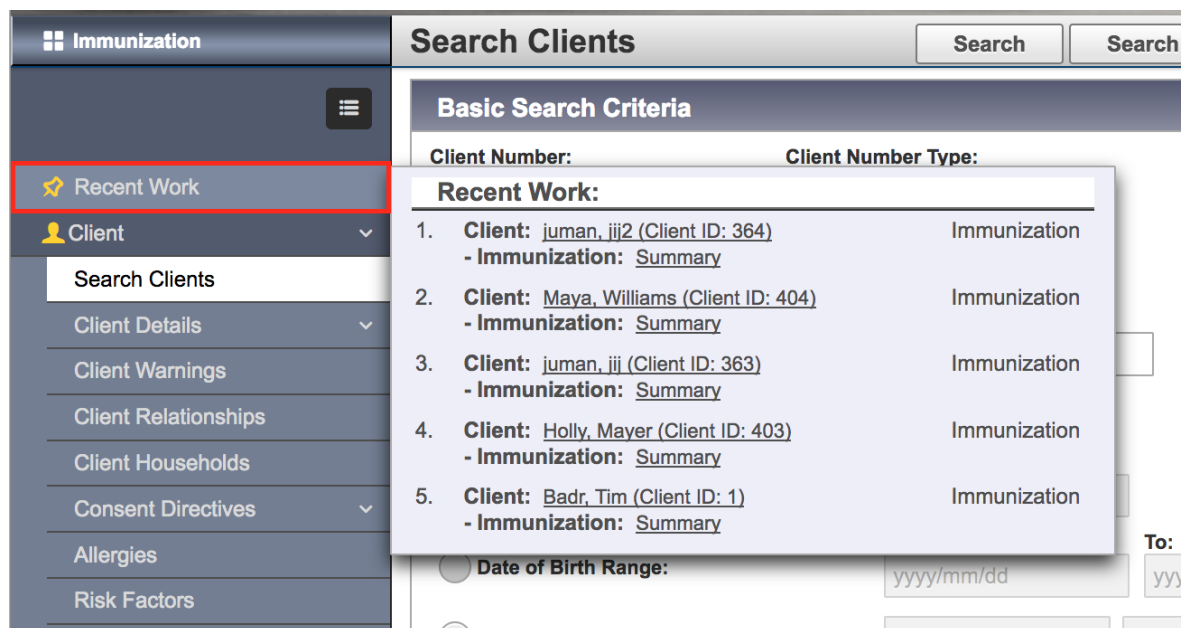


The screenshot displays the 'Search Clients' interface. On the left, a navigation menu is expanded under the 'Client' category, listing various search and management options. The 'Search Clients' option is selected. The main area contains a 'Basic Search Criteria' form with fields for Client Number, Gender, Nationality, First Name, Middle Name, Last Name, and Mother's Name. It also includes options for 'Date of Birth or Age Range Not Applicable', 'Date of Birth', 'Date of Birth Range', and 'Age'. There are checkboxes for 'Include Inactive Clients', 'Include Indeterminate Clients', and 'Use Phonetic Matches'. At the bottom, there are sections for 'Advanced Search Criteria' and 'Search Results'.

## 3.3 Recent Work

The **Recent Work** feature of Panorama allows a user to bypass client search and quickly access the last ten clients the user has worked with.

To access the **Recent Work** list, click **[Recent Work]** in the top of the **Left-Hand Navigation** menu. The **Recent Work** list will expand to show a list of the last ten clients a user has accessed. The **Recent Work** will store information about these clients even after the end of the user's Panorama session and logout from the system.



**Immunization**

**Search Clients** [Search] [Search]

**Basic Search Criteria**

Client Number: Client Number Type:

**Recent Work:**

1. Client: [juman, jij2 \(Client ID: 364\)](#) Immunization  
- Immunization: [Summary](#)
2. Client: [Maya, Williams \(Client ID: 404\)](#) Immunization  
- Immunization: [Summary](#)
3. Client: [juman, jij \(Client ID: 363\)](#) Immunization  
- Immunization: [Summary](#)
4. Client: [Holly, Mayer \(Client ID: 403\)](#) Immunization  
- Immunization: [Summary](#)
5. Client: [Badr, Tim \(Client ID: 1\)](#) Immunization  
- Immunization: [Summary](#)

Date of Birth Range: yyyy/mm/dd To: yy

### 3.4 Back Button

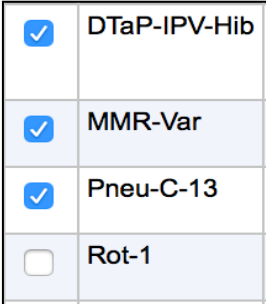


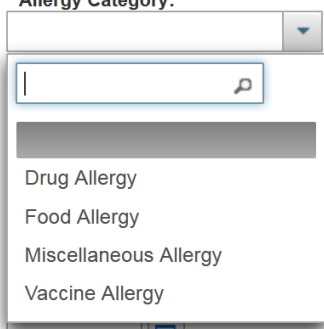
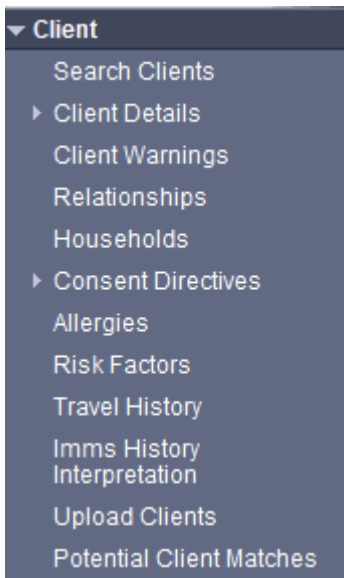
Users should not use the back button of the internet browser to move/return to the previous screen of Panorama. The most common way to safely exit the active screen and return to the previous screen is by clicking the **Cancel** or **Close** buttons.

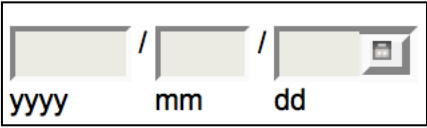

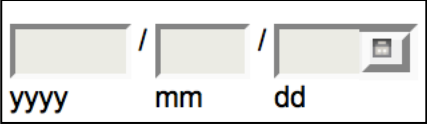
Other methods of exiting a specific screen will be described in this manual where applicable.

#### 3.4.1 Common Panorama Fields and Screen Buttons

The following table provides a list and descriptions of common screen elements and buttons in Panorama.

BUTTON/FIELD TYPE	DESCRIPTION
<input type="radio"/> Radio Button  <b>Part of Multiple Birth?</b> <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	A <b>Radio Button</b> is used to select <u>only one</u> value from a predefined set of options. It can be selected or deselected.

	<p>A <b>Checkbox</b> is used to select <u>one or more than one</u> value from a predefined set of options. It can be selected or deselected.</p>
	<p>A <b>Command button</b> is used to initiate an immediate action that is invoked when the user clicks on the button. For example, clicking the  button will initiate a client search.</p>
	<p>A <b>Dropdown list</b> is used to select one value from a list. When a dropdown list is inactive, it displays a single value. When activated, it displays (drop downs) a list of values from which the user can select one.</p>
	<p>The <b>Left-Hand Navigation</b> menu allows the user to easily navigate between the screens once a user has accessed one of Panorama's main sections or components.</p>

<p><b>Last Name:</b></p> <input type="text"/>	<p><b>Free text</b> fields allow users to enter text of their choice. There may be a limitation to the number of characters a user can enter in a field.</p>
<p><b>* Last Name:</b></p> <input type="text" value="Mohammed"/>	<p><b>Mandatory</b> fields must be populated before the information on the screen can be saved. Mandatory fields will be marked by a red asterisk.</p>
<p><b>* Occupations:</b></p> <input type="text" value="Heal"/> <div>Health Care Worker</div>	<p><b>Type-ahead</b> fields are programmed to anticipate what the user is typing and provide suggestions for the user to choose from. A user can only enter one of the suggested values.</p>
	<p>A <b>date</b> field is used to enter dates using a predefined yyyy-mm-dd format.</p>
 	<p>A <b>calendar</b> field in Panorama can be used to enter the date by picking the date from the calendar. To display the calendar field, a user can click the calendar widget in the date field. By default, the current date is automatically selected. A user can select another date as needed. Single right and left-facing arrows can be used to select a required month. Double right and left-facing arrows can be used to select a required year.</p>

## 4 SET-UP USER DEFAULTS

User defaults in Panorama are designed to minimize data entry and reduce the time required to enter the same information repeatedly on different Panorama screens. A user can define how Panorama will fill out specific fields on most immunization screens in advance.

User defaults enable users to view and update their preferences for immunization default values. The default values are used to automatically populate specific data entry fields on immunization screens. Immunization defaults will support data entry for routine clinical services at the point of service or for historical documentation.

Set up your Immunization Defaults before entering any data in Panorama. Any information entered in the Immunization Defaults may be updated as often as required.

### 4.1 Updating User Profile

---

Users must be assigned to one or more Nova Scotia Health Authority Organizations to use Panorama. There are different types of Organizations in Panorama. These include Nova Scotia Health Authority-related Organizations (called Jurisdictional Organisations or JOrgs in Panorama) and School-related Organizations. More details on the Organizations are included in the ADM 101 training course for System Administrators.

User Profiles will be automatically populated when the user is registered in Panorama. In the situation where users belong to more than one organization, they will select their Organization upon login and the specific Service Delivery Location (SDL) at the Panorama Dashboard page.

A **Service Delivery Location** (SDL) is the physical location where Providers provide immunization services. A user can be assigned to one or more SDLs and will have the option to choose which SDL to record information for by selecting the correct item from the **Service Delivery Location** dropdown list and clicking the **Select** button. You may return to this page and change your SDL at any time during your session.

The Public Health Solution for Disease Surveillance and Management supports the identification, management and control of infectious diseases and outbreaks that pose a threat to the public's health.

Specify your Service Delivery Location (SDL).

\* Service Delivery Location:  Select

SDL Time Zone:

### Personal WorkLoads

View all your assigned work tasks

### Reporting

Specify and view client specific and aggregate reports.

### Document Management

Add, update, delete and search for electronically attached documents.

### Notifications

Create and view jurisdiction and threshold notifications.

[View Jurisdiction Notifications](#)

[View Threshold Notifications](#)

**Need Help ?**  
Contact information for the [Help Desk](#)

Prev Today Next

March 2017

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19	20	21	22	23	24	25
26	27	28	29	30	31	

**External Reference Links**  
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

Next you will select **My Account** on the top right-hand corner of the **Dashboard** page, then select **User Profile**. Users should validate their user preferences and update fields as necessary to ensure information is complete (i.e. telephone number and email).

**PANORAMA** Public Health Solution for Disease Surveillance and Management **PNS Test**

Threshold Notifications: 0  
Jurisdiction Notifications: 0

Tester Panorama: supervisor for NSHA

Help Contact Us **My Account** Change Role Logout

User Profile

Immunizations Defaults

Notification Preferences

Network Speed Test

Specify your Service Delivery Location (SDL).

\* Service Delivery Location:  Select

SDL Time Zone: ADT

### Personal WorkLoads

View all your assigned work tasks

### Reporting

Specify and view client specific and aggregate reports.

### Document Management

Add, update, delete and search for electronically attached documents.

### Notifications

Create and view jurisdiction and threshold notifications.

[View Jurisdiction Notifications](#)

[View Threshold Notifications](#)

**Need Help ?**  
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26	27	28	29	30		

**External Reference Links**  
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

Recent Work

Indices

Terminology

Templates

Security

Miscellaneous

Reporting & Analysis

Notifications

WORK MGMT

INVESTIGATIONS

OUTBREAKS

IMMUNIZATION

FAMILY HEALTH

INVENTORY

ADMIN

Manage User Profile

Save Reset

Personal Information

Hide Personal Information

User ID : PERMISSIONS

Name: ALL PERMISSIONS

Default SDL : Sample JOrg SDL

Preferred Language : English

Organizational Membership Information

Hide Organizational Membership Information

Organization Name : Sample Jurisdictional Organization

Phone Number(s)

A maximum of 3 phone numbers can be entered

Type: emergency contact

Number: ( ) - ext.

Add Clear

Row Action: Update Remove

Type	Number	ext.

Email:

To specify a Service Delivery Location first click on the 'Find' button. Then search, or type the name of the Service Delivery Location you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.

Clear

Add SDL

Service Delivery Location: Sample Jurisdictional Organization > [Sample JOrg SDL]

Find

Row Action: Remove

Associated Service Delivery Location(s)	Default
Sample JOrg SDL	✓

Default Encounter Group and Service Provider

Hide Default Encounter Group and Service Provider

Click Find to select a provider:

Encounter Group:

Service Provider: Doctor Test

Clear Provider

Provider:

Find

Save Reset

## 4.2 Setting Immunization Preferences

Users may also set preferences based on their typical practices for administration of vaccine and pharmacologic products. Panorama enables documentation of age-specific preferences to allow for anatomical sites that appropriate for each client age range.

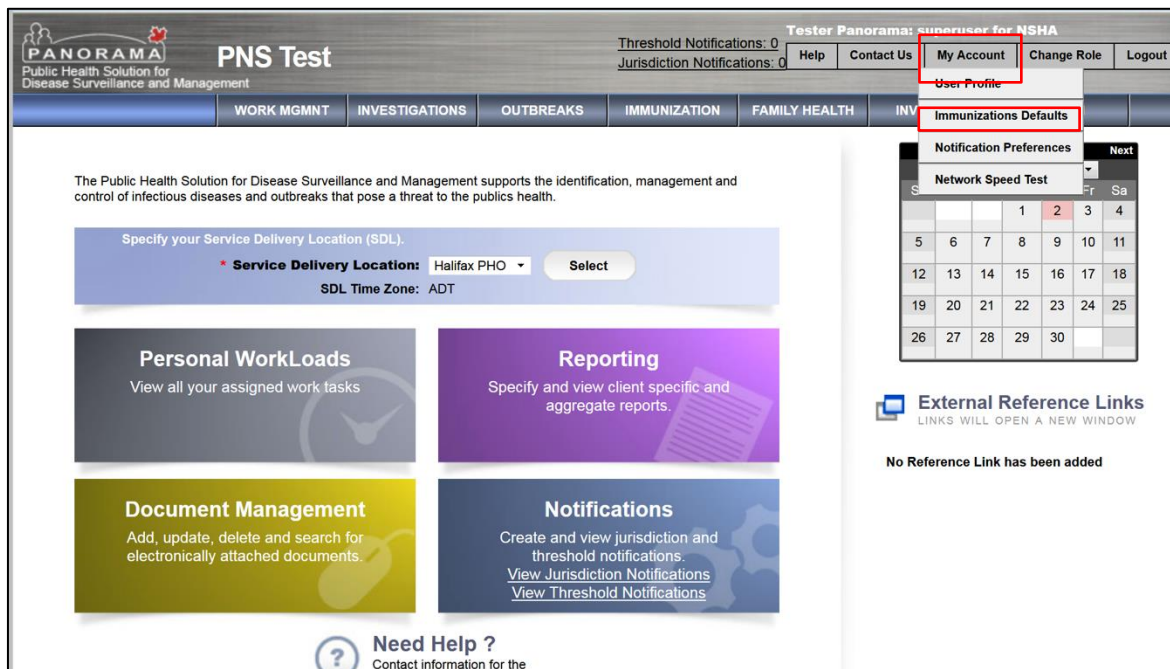
Setting Immunization Preferences supports faster documentation and auto-populates the user's documented preferences for point of service and historical documentation.

The **Update Immunization Default** screen displays a summary of current Immunization Default settings for the user including:

- General Immunization Defaults



- Anatomical Admin Site Defaults
- Immunizing Agent Defaults



**PNS Test**

Threshold Notifications: 0  
Jurisdiction Notifications: 0

Tester Panorama: **superuser for NSHA**

Help Contact Us **My Account** Change Role Logout

User Profile

**Immunizations Defaults**

Notification Preferences

Network Speed Test

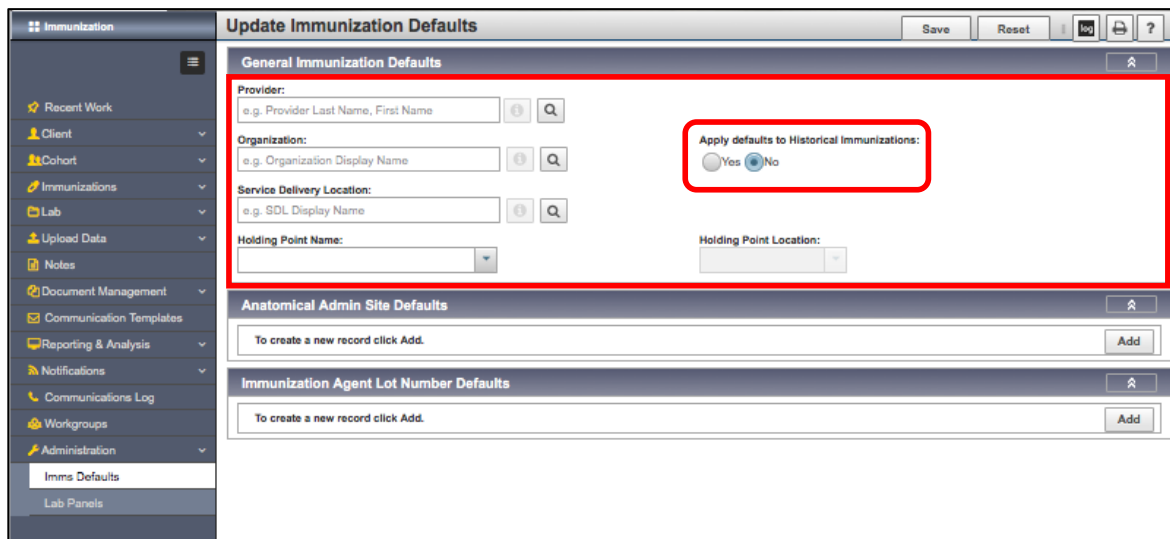
Next

S			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

**External Reference Links**  
LINKS WILL OPEN A NEW WINDOW

No Reference Link has been added

**Need Help ?**  
Contact information for the



**Update Immunization Defaults**

Save Reset

**General Immunization Defaults**

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

Organization:  
e.g. Organization Display Name

Service Delivery Location:  
e.g. SDL Display Name

Holding Point Name:

Holding Point Location:

**Apply defaults to Historical Immunizations:**

☐ Yes ☒ No

**Anatomical Admin Site Defaults**

To create a new record click Add.

**Immunization Agent Lot Number Defaults**

To create a new record click Add.

### 4.3 Provider Default

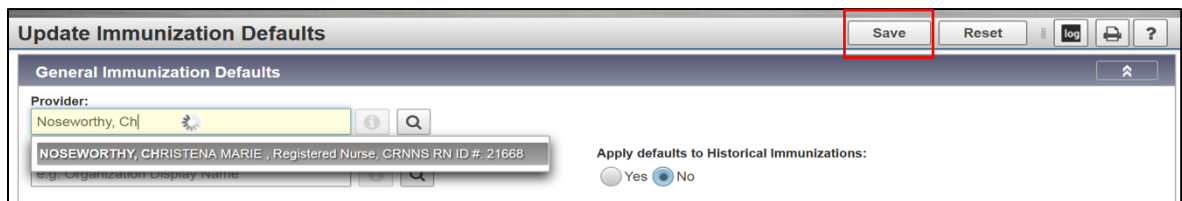
It is recommended that nurses leave the Provider section vacant. Panorama will automatically default to the Provider who has signed in when they are documenting provider recorded immunizations.



Additionally, nurses should select 'No' regarding applying default to historical immunizations. Users will still be able to select any provider for the administration of immunizations but this will not be auto-populated when documenting historical immunizations.

Nurses who are recording many immunizations on behalf of another provider may want to set the Provider default setting to reflect another provider's name when documenting non-provider recorded immunizations.

Click on the **Provider** field to type the first few letters of the Provider's **last name**. Allow the name to appear and then click on it to select. Click Save after updating each default field or update all fields and then click **Save**.

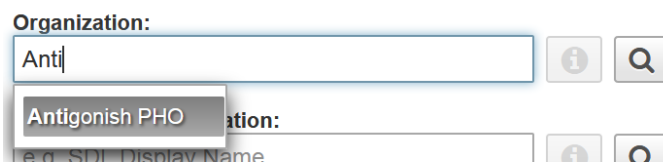



**Tip: Clear Default Settings**

Remember to clear/update the default setting when you are finished entering information for a different provider.

## 4.4 Organization Default

Click in the **Organization** field to and type the first few letters of the **Organization**. Allow the name to appear and then click on it to select.






**Tip: Select the Organization that provides the vaccine supply.**

## 4.5 Service Delivery Location Default

Click in the **Service Delivery Location** field to and type the first few letters of the **Service Delivery Location (SDL)**. Allow the name of the SDL to appear and then click on it to select. This will set the **Default SDL** and will make it easier for you to enter SDL data in your immunization service delivery.

**Service Delivery Location:**

Port Hawkesbury PHO, Port Hawkesbury, Nova s



**Note:** This default is the location you deliver immunizations.

## 4.6 Holding Point Name Default


---

Adding the **Holding Point Name** to the defaults will ensure that when immunizations are delivered, the product is auto-decremented from the Holding Point associated with the provider's public health office.

1. Click in the **Holding Point Name** field and type the first few letters of the Holding Point. Allow the name of the **Holding Point** to appear and then click on it to select. This will set the **Holding Point Name**.

**Holding Point Name:**

Port Hawkesbury PHO



2. Click **Save**.

## 4.7 Holding Point Location Default

---

Each **Holding Point** contains several **Holding Point Locations** (HPLs) where inventory is stored. Inventory intended for immunizations is stored in operational **Holding Point Locations**. Once a **Holding Point Location** default is set, the immunizations you provide will automatically auto-decrement from it. If setting up a **Holding Point Location** default, consult with your Biological Coordinator to confirm which **Holding Point Location** should be selected.



**Note:** If a nurse delivers immunizations at both school and Public Health Office clinics, two different HPLs will be used.

1. Click in the **Holding Point Location** field and make a selection.

**Holding Point Location:**

PtHawkes-HPL1-Op  
PtHawkes-HPL2-Clinic  
PtHawkes-HPL5-SC

**Holding Point Location:**

PtHawkes-HPL2-Cli...

2. Click **Save**.

## 4.8 Anatomical Admin Site Default

The Anatomical Admin Site Defaults are an optional process where the preferred sites of administration can be identified for some or all vaccines. This default value is used to record immunization preferences for the anatomical site for a specific immunizing agent administered to a pre-defined age group. Once an immunizing agent is selected for a client of a matching age, Panorama will automatically populate the anatomical site for this vaccination.

1. To add a new Anatomical Admin Site default, click **Add** on the right side of the section.

2. Select the **Immunizing Agent** by scrolling down the dropdown list or by typing the first few letters of the desired agent. Click on the desired agent to select it.

3. Next, select the desired anatomical site location from the dropdown menu.

4. Finally, enter the Minimum and Maximum ages, then click **Apply**. If the default should apply to older children and adults, leave the maximum age field blank. To add more defaults for other agents, simply click **Add** again and repeat this process.

Immunizing Agent	Anatomical Site	Min Age	Max Age
DTaP-IPV	Deltoid, right	25 mo.	
DTaP-IPV-Hib-HB	Anterolateral thigh, right	0 mo.	24 mo.
Pneumococcal Prevnar 13	Deltoid, right	25 mo.	
Pneumococcal Prevnar 13	Anterolateral thigh, right	0 mo.	24 mo.

Total: 4

In the example above, the user has set a preference for administering Pevnar 13 in the anterolateral thigh for children ages 0-24 months, and for all clients older than 24 months, the default site is the deltoid. DTaP-IPV-Hib-HB is similarly set for the anterolateral thigh from 0-24 months, with the deltoid site defaulted for DTaP-Hib after age 25 months.

5. After adding all default preferences, click **Save** to ensure User Preferences are successfully added to the profile.



**Tip: Changing Defaults**

*Defaults may be changed at any time by the user. Additionally, when documenting an immunization, the user can select a different value other than the default simply by clicking on the field and selecting a different value. For example, you may have a default set for the left deltoid, but if the client requires a different sit of administration for some reason, the Provider can simply select a different site from the available options in the dropdown menu.*

## 5 IMMUNIZATION FORECASTER

### 5.1 What is the Immunization Forecaster

The Immunization Forecaster is a decision-support tool contained in the Immunization section of Panorama and used to support clinical identification of the specific vaccine needs of clients based on the Nova Scotia Publicly Funded Vaccine Eligibility Policy, NS Immunization Schedules, best practices and recommendation on immunizations provided through Canadian Immunization Guide, National Advisory Committee on Immunizations, and Product Monographs

***The Forecaster tool does not replace clinician judgements about the best care for individual clients based on their unique needs and health situation.***

The Immunization Forecaster tool generates a forecast for a client that includes recommendations on which specific immunizations should be administered to a client in the future and the recommended dates of administration.

The Immunization Forecaster assesses all routine, publicly funded immunizations recorded in Panorama. Nova Scotia requirements and immunization guidelines are directly converted into the rules that the Forecaster uses to generate all recommendations.

The Forecaster considers the client's age, gender, administered immunizations, and special considerations such as exemptions and contraindications. If a recorded immunization does not meet the Forecaster rules, the Forecaster will mark it as "Invalid" and the immunization will be displayed in the **Summary Table** with an 'X' in front of the date. Invalid immunizations will not count towards series completion.

**The Immunization Forecaster supports clinicians in their decision-making but is not meant to and should never replace clinical judgment.** The Immunization Forecaster can save a clinician time and effort in determining the immunizations due or overdue for a client based on a client's clinical history and published clinical guidelines. Your clinical judgment may at times be different from the Immunization Forecaster recommendations. A user can enforce clinical judgment over the Forecaster by 'overriding it' and marking invalid immunizations as valid, as well as the reverse.

The Immunization Forecaster informs all coverage reports, Search Client Forecast results (client immunization status list), and client status in the Mass Immunization Event. This means that whether a client is included in the coverage report or Search Client Forecast as up-to-date or due for an immunization, is based on the Forecaster decision.

To support the Forecaster and the accuracy of a client's individual forecast, as well as other Panorama components such as Search Client Forecast, immunization coverage reports and Mass Immunization Event client lists, **users must ensure that the client immunization history has been correctly documented and validated.** This is an essential component to ensure the future forecast is correct.

A user should verify that all available clinical information for a client has been documented in Panorama.

This includes:

- **Age:** A client must have a documented date of birth documented in Panorama.
- **Gender:** A client must have a gender documented in Panorama.
- **Historical Immunizations:** All past immunizations must be created as historical immunization records. All immunizations valid from the clinical perspective must display as valid and no invalid immunizations may appear as valid.
- **Special Considerations:** If a client has a history of a disease and should be exempt from a vaccination, is a conscientious objector, or is contraindicated for a vaccination due to a clinical condition, this information must be recorded in the Special Considerations.

The above factors directly impact the Forecaster. For example, if a client is exempt from MMR (and is recorded as a **Special Consideration** in Panorama) then the Forecaster will not forecast MMR during the specified time frame recorded.

As a Panorama user, it is your responsibility to provide accurate and up-to-date information about client clinical history to support informed and accurate decision-making for individual client forecasts and immunization reports.

## 5.2 Reading the Forecaster

The Immunization Forecast section of the client record displays all recommended immunizing agents based upon the NS immunization schedules currently in effect, compared against the client's age, gender, immunization history, contraindications and exemptions recorded for the client.

Antigens are 'rolled up' or combined to be forecasted as agents such as vaccine products like DTaP-IPV-Hib. This agent will be administered as one vaccine instead of each antigen administered separately. The following screenshot shows the agent being forecasted as one vaccine. Where NS does not use a combined vaccine these antigens will be forecasted separately.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 01								
Forecast Status calculated as of: 2018 Feb 01								
Refresh Forecast								
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
DTaP-IPV-Hib	1				2016 Mar 20	2016 Apr 07	2016 May 07	Overdue
Pneu-C-13	1				2016 Mar 20	2016 Apr 07	2016 May 07	Overdue
Men-C-C	1				2016 Apr 07	2017 Feb 07	2017 Mar 07	Overdue
MMRV	1				2017 Feb 07	2017 Feb 07	2017 Mar 07	Overdue
HB-regular	1				2016 Feb 07	2028 Sep 01	2029 Jan 01	Eligible
HPV-4	1				2025 Feb 07	2028 Sep 01	2029 Jan 01	Up To Date
Men-C-ACYW-135	1				2017 Feb 07	2028 Sep 01	2029 Jan 01	Eligible
Pneu-P-23	1				2018 Feb 07	2081 Feb 07	2081 Mar 07	Up To Date

Dose

The Forecasted Dose # column identifies the next dose number for an agent in a multi-dose series for which the client is eligible. Dose # is calculated based on the number of documented valid doses of the agent in the client history.

In the example below, a client has not yet received any doses of MMRV and is forecasted for Dose 1. The client has already received Dose 1 of DTaP-IPV-Hib and is forecasted for Dose 2.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 02								
Forecast Status calculated as of: 2018 Feb 02								
								Refresh Forecast
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Pneu-C-13	1				2016 Mar 20	2016 Apr 07	2016 May 07	Overdue
DTaP-IPV-Hib	2				2016 May 17	2016 Jun 07	2016 Jul 07	Overdue
Men-C-C	1				2016 Apr 07	2017 Feb 07	2017 Mar 07	Overdue
MMRV	1				2017 Feb 07	2017 Feb 07	2017 Mar 07	Overdue

## Codes

Users may occasionally notice values present in the **Code** column. There are three codes that may be used to reflect specific situations.

- **EDS** indicates if the forecasted agent is **Extra Dose Safe**. This relates to an extra dose of an antigen administered in order to give a particular agent. E.g. Client is complete for measles but needs mumps and rubella. The immunization rules will allow MMR to be forecasted providing the additional measles is the only way to support the client's need for mumps and rubella.
- **LOA** indicates a **Left-Over Antigen**. This situation appears when the available immunization agents for administration do not contain all forecasted antigens. An example of this would be if a client is missing a Diphtheria or Pertussis but Td is forecasted. The Td would appear as forecasted and the Diphtheria would also appear to be forecasted but would carry the code LOA.
- A letter "**M**" (for mixed dose) may display in the Forecasted Dose column instead of a dose number. A mixed dose indicates that the client has received a different number of doses of the antigen components for the forecasted agent. For example, if a client has a single IPV in history, but no Tdap, the forecasted dose for Tdap will show "M" because it is the first dose of Tetanus, Diphtheria and acellular pertussis but the second dose of IPV.



## Eligible

The **Eligible** column displays the earliest clinically valid date on which a forecast agent can be given in compliance with the age and minimum interval rules governing vaccine administration.

In the example below, the client became eligible for Dose 1 of Tdap-IPV on 2006 Mar 21.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 01								
Forecast Status calculated as of: 2018 Feb 01								
Refresh Forecast								
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Tdap-IPV	1				2006 Mar 21	2006 Apr 07	2006 May 07	Overdue
MMRV	1				2007 Feb 07	2007 Feb 07	2007 Mar 07	Overdue
HB-regular	1				2006 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
HPV-4	1				2015 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
Men-C-ACYW-135	1				2007 Feb 07	2018 Sep 01	2019 Jan 01	Eligible

## Due

This column displays the date when the immunization became due. This is the same date as the Eligible date.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 01								
Forecast Status calculated as of: 2018 Feb 01								
Refresh Forecast								
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Tdap-IPV	1				2006 Mar 21	2006 Apr 07	2006 May 07	Overdue
MMRV	1				2007 Feb 07	2007 Feb 07	2007 Mar 07	Overdue
HB-regular	1				2006 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
HPV-4	1				2015 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
Men-C-ACYW-135	1				2007 Feb 07	2018 Sep 01	2019 Jan 01	Eligible

## Overdue

This column displays the date when the immunization became overdue. Based on the DHW rules, this date is defaulted as 1 month after the Due date.

In the example below, the client became overdue for Dose 1 of Tdap-IPV on May 7, 2006.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 01								
Forecast Status calculated as of: 2018 Feb 01								
Refresh Forecast								
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Tdap-IPV	1				2006 Mar 21	2006 Apr 07	2006 May 07	Overdue
MMRV	1				2007 Feb 07	2007 Feb 07	2007 Mar 07	Overdue
HB-regular	1				2006 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
HPV-4	1				2015 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
Men-C-ACYW-135	1				2007 Feb 07	2018 Sep 01	2019 Jan 01	Eligible

## Forecast Status

Four types of immunization status exist for clients:

**Up to Date:** The client is not yet eligible (e.g., “Eligible in the future”), and the minimum interval and/or minimum age has not yet been satisfied.

**Eligible:** The Eligible date has been reached (minimum interval and/or minimum age have been satisfied), but the Due date is in the future.

**Due:** The recommended date for vaccine administration according to the current schedule date; this implies minimum intervals and/or minimum age have been satisfied.

**Overdue:** For *routine immunization schedules*, forecasted agents are considered overdue one (1) month after the Due date has passed,. For *school immunization schedules*, forecasted agents are considered overdue four (4) months after the due date. Overdue status also considers minimum intervals: if a client is behind on immunizations, the status will remain Up to Date until the minimum interval has passed, then it will become Overdue.

## Reforecasting

Panorama automatically updates a client’s immunization forecast when new immunizations, exemptions/contraindications are added, updated, or deleted, or/and a birth date or gender changes. User also have the option to execute a forecast on demand by clicking the **Refresh** button.

Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 01								
Forecast Status calculated as of: 2018 Feb 01								
Refresh Forecast								
Immunizing Agent/Antigen	Forecasted Dose #	Codes	Volume	Brand	Eligible	Due	Overdue	Forecast Status
Tdap-IPV	1				2006 Mar 21	2006 Apr 07	2006 May 07	Overdue
MMRV	1				2007 Feb 07	2007 Feb 07	2007 Mar 07	Overdue
HB-regular	1				2006 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
HPV-4	1				2015 Feb 07	2018 Sep 01	2019 Jan 01	Eligible
Men-C-ACYW-135	1				2007 Feb 07	2018 Sep 01	2019 Jan 01	Eligible

Whenever a client’s forecast is re-executed, the validity and dose number of each of the client’s immunizations is re-evaluated, updated, and displayed. All valid immunizations will be renumbered sequentially based on the order within the series.

Any immunizations that are marked as invalid after the re-forecast will not be affected. They will be displayed as their intended dose #: the next valid dose will continue with the next available dose number.

Any immunizations that were not forecast will not be affected.

## Invalid Immunizations

Any vaccinations that do not meet the forecaster rules are marked as invalid in Panorama. Invalid doses are displayed with an ‘X’ mark in the immunization date in the

**Immunization History- Summary Grid** table.

In the example below, a client was administered MMRV below the minimum age of 12 months, and an X is displayed in the **Summary Grid** table alerting the clinician that this

dose is invalid. Additionally, the status of the dose is identified as Invalid in the **Detailed Data Table** below the Summary Grid.

Immunization Details							
Immunization History - Summary Grid							
Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
DTaP-IPV-Hib	2016 Apr 19						
MMRV	2017 Feb 01 (X)						

Immunization History - Detailed Data Table							
<div> <div>Update</div> <div>View</div> <div>Delete</div> </div> <div> <div>Add Single Immunization</div> <div>Add One or More Immunizations</div> </div>							
	Agent	Date Administered	Age at Administration	Status	Trade Name	Body Site	Volume
	DTaP-IPV-Hib	2016 Apr 19	2m 12d	Valid			
	MMRV	2017 Feb 01	11m 25d	Invalid			

Invalid doses will not be counted towards the client's total series when planning future doses. For example, the client in the above example will require Dose 1 of MMR to be administered as the Invalid dose will not count as Dose 1.

Invalid doses will be considered when calculating minimum intervals for planned doses for safety/clinical effectiveness reasons.

Each antigen will be listed with one of the following corresponding invalidation reasons:

- **Client administered with same agent on same day:** If two doses of the same agent/antigen are given on the same day, Dose 1 is marked valid and Dose 2 is marked as invalid. All the antigens within the invalid dose will have this reason.
- **Additional dose resulting from use of a multi-antigen agent:** If an antigen in a multi-antigen agent is not "Extra Dose Safe" (EDS), and is provided as an additional dose as part of this agent, this reason will display for the invalid antigen.

Update		View		Delete				
		Agent ▲	Date Administered ▾	Age at Administration ▾	Status ▾	Trade Name ▾	Body Site ▾	Volume ▾
<input type="radio"/>		DTaP-IPV-Hib	2016 Apr 19	2m 12d	Valid			
<input type="radio"/>		M	2017 Apr 12	1y 2m	Valid			
<input type="radio"/>		MMRV	2017 Feb 01	11m 25d	Invalid			
<input type="radio"/>		MMRV	2017 Jun 13	1y 4m	Valid			

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

Antigen Count								
Immunization Forecast by Agent/Antigen								
Last Forecast Ran On: 2018 Feb 02								
Forecast Status calculated as of: 2018 Feb 02								
Refresh Forecast								
Immunizing Agent/Antigen ▾	Forecasted Dose # ▾	Codes ▾	Volume ▾	Brand ▾	Eligible ▾	Due ▾	Overdue ▾	Forecast Status ▾
Pneu-P-23	1				2018 Feb 07	2081 Feb 07	2081 Mar 07	Up To Date
Pneu-C-13	1				2016 Mar 20	2016 Apr 07	2016 May 07	Overdue
MMRV ( Measles (M)* )	M	EDS			2017 Jul 11	2017 Aug 07	2017 Sep 07	Overdue
Men-C-C	1				2016 Apr 07	2017 Feb 07	2017 Mar 07	Overdue
Men-C-ACYW-135	1				2017 Feb 07	2028 Sep 01	2029 Jan 01	Eligible
HPV-4	1				2025 Feb 07	2028 Sep 01	2029 Jan 01	Up To Date
HB-regular	1				2016 Feb 07	2028 Sep 01	2029 Jan 01	Eligible
DTaP-IPV-Hib	2				2016 May 17	2016 Jun 07	2016 Jul 07	Overdue

- **Administered date is less than or greater than eligibility date:** If neither of the above two reasons are given, the dose will have this reason. This is what will be seen most often, meaning that a minimum interval, minimum age, or maximum age was violated.

The Forecaster will not invalidate doses in the following cases:

- Additional doses beyond a series end are administered that meet minimum interval requirements
- Dose was received by a route other than what is recommended
- Higher (or lower) than recommended vaccine dosage was administered (except for HB Engerix-B Adult 1.0ml and 2.0ml which have different minimum age eligibilities, and Recombivax Ped 0.5ml and 0.25ml which have different maximum age eligibility)
- Less than a full dose of vaccine given due to syringe/needle malfunction

These and other reasons can be applied by an authorized user to manually mark vaccines as invalid.

Immunization doses that have been overwritten and marked as invalid by the user will be marked with 'OX' (as overridden) not 'X'.

Immunization Details						
Immunization History - Summary Grid						
Agent	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered	Date Administered
DTaP-IPV-Hib	2016 Apr 19 (OX)					

## Immunization Override

There are two types of immunization overrides. These include:

- From Valid to Invalid, and
- From Invalid to Valid

If a clinician determines that a recorded immunization that is marked as Valid is actually invalid for a particular reason (such as an incorrect route or dosage or some other clinical reason), the status of this immunization can be manually set to Invalid.



*Only users authorized to make such decisions should proceed to invalidate immunizations as this action directly affects the Forecaster and the recommendations for client immunizations.*

## 5.3 Special Considerations and the Forecaster

The Immunization Forecaster is a clinical decision support tool used in the Immunization module of Panorama. The Immunization Forecaster produces a forecast for a client, based on recommendations regarding the specific immunizations that should be administered in future and when they should be administered.

Clients may have contraindications or exemptions for a specific vaccine in their presenting condition or history that should temporarily or permanently suspend (delay or stop) the forecast for a vaccine. The forecaster will only use this information if it is recorded under **Special Considerations** in Panorama. It is important to ensure that the exemption and contraindication information in Panorama is always up-to-date as it has a direct impact on the forecaster and client safety.

Active contraindications and exemptions will put the forecast on hold and exclude the client from overdue lists (Query Client Forecast), show the client status as **Not Forecasted** in the Mass Immunization Event Worksheet, and list the client as being up-to-date for a vaccine in coverage reports. **If a client has an exemption or contraindication for a vaccine but it is not documented in Panorama, this vaccine will still be forecasted.**

## 6 MASS IMMUNIZATIONS FOR SCHOOL IMMUNIZERS OVERVIEW

Mass Immunization Events in Panorama provides the functionality for implementing planned or ad-hoc mass immunization services (e.g. school, community, or outbreak related). The functionality is not designed to plan and deliver a *single* client immunization nor perform standard clinic operations.

Events are created to facilitate provision of immunizations to a group of clients in a single location. In Nova Scotia, Mass Immunization Events will be used when an event needs to be tracked for reporting purposes. The events can be defined in advance, by identifying the date, location, clients, providers and agents involved. The recording of the immunizations on the event date(s) is greatly facilitated by providing appropriate defaults, and reducing data entry as much as possible.

A Mass Immunization Event's main purpose is to facilitate the data entry of multiple immunizations. School Immunizers will not create mass immunization events, but will be responsible to search for a specific event and record immunizations in the Worksheet.

This document will cover the following:

1. Regular Mass Immunizations
2. School Mass Immunizations (public and private schools)
3. Searching Mass Immunization Events
4. Mass Immunization Worksheet
5. Assess and Immunize
6. Updating Event Status

**Nova Scotia Standard Operating Procedure (SOP) Check:** You should be aware that a detailed SOP is available governing school immunization clinics and associated activities. Please refer to your SOP manual to ensure you are aware of the required protocols and responsibilities for each staff role in preparation for general mass immunization and school clinic events in Nova Scotia.

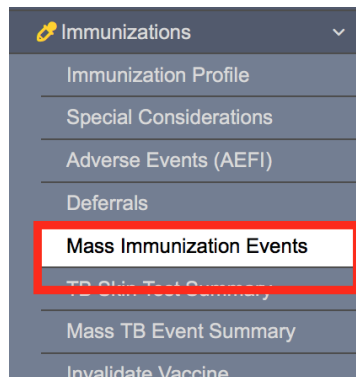
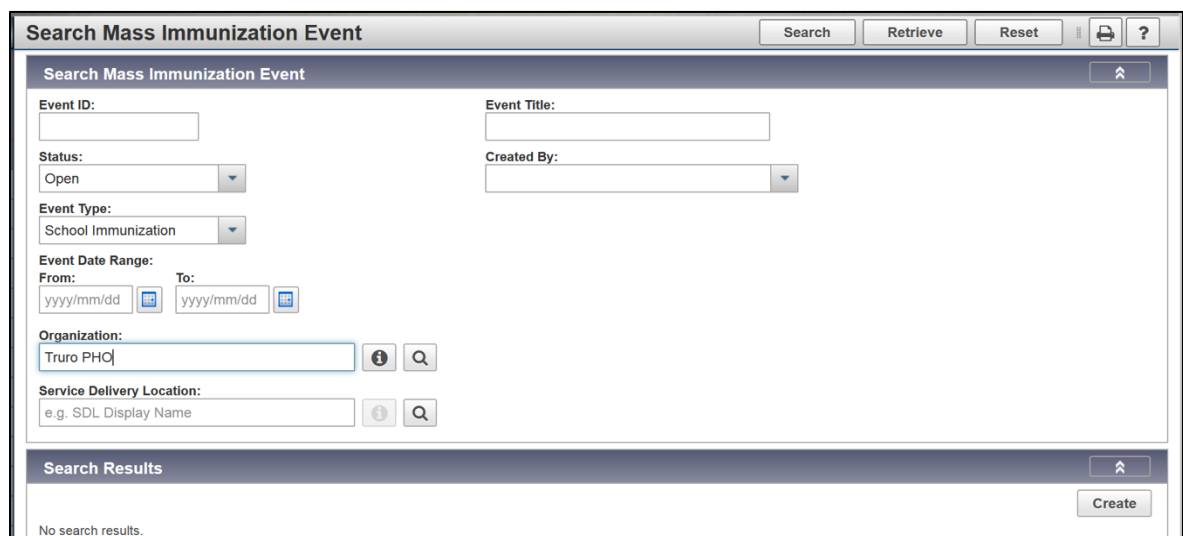
### 6.1 Searching for a Mass Immunization Events

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Similar to other functions in Panorama, it is best practice to search before proceeding with creating a new record in Panorama. Mass Immunizations can be searched by using multiple parameters such as **Event ID**, **Organization**, **Event Date(s)**, or **Event Type**. Once the User verifies the event has not been created previously, the User can proceed with creating a new event.

The steps to **Search** for a Mass Immunization Event are as follow:

1. Access the **Mass Immunizations Events** screen under **Immunization** from the **Left-Hand Navigation**. The **Search Immunization Events** screen displays.

2. Search for the mass immunization event by clearing the organization field and typing the service delivery location in the service delivery location field [ the school name]
3. Select the mass immunization event from the presented list by clicking on the radio button to the left of the event.

Search Results							
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Worksheet</div> </div> <div>Create</div>							
Event ID	Event Title	Event Date	Additional Dates	Client List	Provided By	Status	
1	IMMS-1 HPV-4	2017 Nov 06		Y	DORAN, James Anthony	Open	
Total: 1			1		50		



### Tip: Searching for an Existing Event

If the User searches with the correct information for an event that was previously created, the event will show up in the **Search Results** section. Simply select **Update**, or go straight to the **Worksheet**.

## 6.2 Using the Immunization Worksheet

The **Mass Immunization Event Worksheet** provides a summary overview of the Mass Immunization Event along with providing the user the ability to perform functions either with an individual client or a group of clients.

The Worksheet works efficiently by sending the user to the screen where the information resides and the User can easily return to the Worksheet or Update Event screen usually by clicking on a return button or a button with the screen name. Example: A user can select a client, click on Assess and Immunize, click on a multitude of buttons that will take them to the screen where the information resides such as AEFIs or Allergies within the client's own record to view and/or record, and then return to the client list on the Work Sheet.

Accessing the immunization worksheet:

1. To access the Event Worksheet, click **Worksheet** from the search results screen.

Search Results							
<div> <div>Update</div> <div>View</div> <div>Delete</div> <div>Worksheet</div> </div> <div>Create</div>							
Event ID	Event Title	Event Date	Additional Dates	Client List	Provided By	Status	
1	IMMS-1 HPV-4	2017 Nov 06		Y	DORAN, James Anthony	Open	
Total: 1			1		50		



2. The **Event Worksheet** is now displayed.

**Event Worksheet**
Launch Report
Additional Actions
log
print
help

Cohort ID: 17
Cohort Name: TruroJRHS\_Grade7\_November2017
Encounter Group(s): Immunization
Client List Name/ ID: TruroJRHS\_Grade7\_November2017 / 12

**Event Worksheet**

Event Title: TruroJRHS\_Grade7\_November2017  
Event Date: 2017 Nov 13 , 2017 Nov 14  
Event Type: School Immunization

Event ID: 9  
Location: Truro Junior High School  
Status: Open  
Created By: PERMISSIONS, ALL

Displaying 7 out of 7 clients

Record Consent
Record Immunization
Client Event Status
Client Event Summary
Deferrals
Preview Client

View Consent
Update Client
Generate Letters
Assess and Immunize

		Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
					Filter	Filter	Filter	Filter	Filter ON
<input type="checkbox"/>		42	Winter, Wanda	2005 Feb 24	Female	Men-CACYW-...	Due	Missing	---
<input type="checkbox"/>		42	Winter, Wanda	2005 Feb 24	Female	HPV-4	Due	Missing	---
<input type="checkbox"/>		44	Sunshine, Elissa	2005 Jun 10	Female	Men-CACYW-...	Due	Granted	---
<input type="checkbox"/>		44	Sunshine, Elissa	2005 Jun 10	Female	HPV-4	Due	Granted	---
<input type="checkbox"/>		40	Summer, Susan	2005 Jan 06	Female	Men-CACYW-...	Due	Missing	---
<input type="checkbox"/>		40	Summer, Susan	2005 Jan 06	Female	HPV-4	Due	Missing	---
<input type="checkbox"/>		46	Storm, Henry	2005 Mar 21	Male	Men-CACYW-...	Due	Granted	---



### Tip: Reading the Worksheet

Only a single immunization can be displayed on each line, so each student will show up on multiple lines if they are receiving more than one agent. This is to accommodate consents/deferrals based on the agent. As an example: A student will be on the list twice if they are receiving Varicella and MMR (Measles, Mumps and Rubella) and display a consent status for each immunization, but a fellow student may only show up once if they are only receiving MMR.



### Tip: Printing a Worksheet

The **Immunization Worksheet** can be printed off as a tool for recording information as necessary to manage the collection of paper consents and reminders sent to parents. To print, click on the **Printer Icon** in the upper right corner of the screen within the Mass Immunization Event Worksheet. A separate screen will appear, then click **Print**.

In addition, a custom report called the **Mass Immunization Registration Sheet** may be printed out ahead of time. This report provides the option to create a print out of a mass immunization event client list that can be used to keep track of clients; it also contains

space for comments. The report may be printed before each clinic and will serve as a back-up in case Panorama is not accessible. See **PNS IMM 104**.

3. From the **Event Worksheet** screen, activities can be performed for either an individual client or for a group of clients. At least one client needs to have been selected for tabs to display. Multiple clients can be selected, however certain tabs are only for individual clients.

Within the Mass Immunization Event Worksheet, under Client List, Users can:

- Use the Client List Filter variables to filter the list of clients displayed
- Select Client(s) to Record Consent [*Nurses trained as school immunizers only are not to record consent*]
- Select Client(s) to View Consent
- Select Client(s) to Update Event Status
- Select Client to Preview Client
- Select Client to Update Client [*Nurses trained as school immunizers only are not to update a client record*]
- Select Client(s) to Record Immunization(s)
- Select Client to create Deferral

Note that Generate Letters is not available in the NS configuration.

Displaying 7 out of 7 clients

<div> Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Preview Client </div> <div> View Consent Update Client Generate Letters Assess and Immunize </div>									
	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status	
<input checked="" type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-CACYW...	Due	Missing	---	



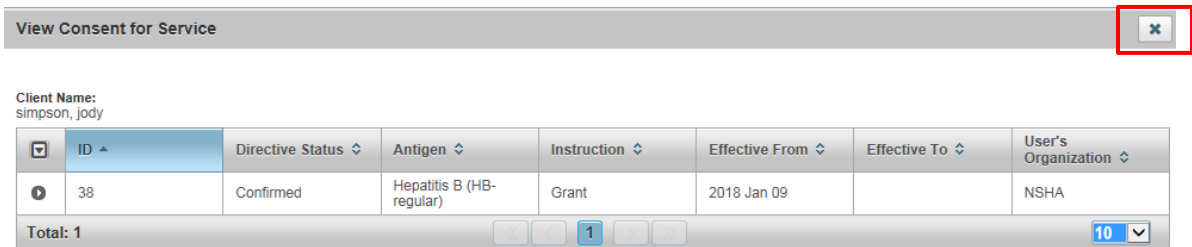
#### **Tip: Forecast Status for Adults**

NS Immunization Forecaster scope does not include Adult Immunizations, hence the forecaster for certain vaccines (for example, Hepatitis B-Adult) will show as Not Forecasted.

## **6.3 Viewing Consent**

Users can view consent for an individual client. This is done by selecting the **View Consent** tab.

1. To view consent for an individual student, go to the **Event Worksheet** and select the student(s) for whom you want to record consent. Select the **View Consent** button.
2. The **View Consent for Service** screen is now displayed.



ID	Directive Status	Antigen	Instruction	Effective From	Effective To	User's Organization
38	Confirmed	Hepatitis B (HB-regular)	Grant	2018 Jan 09		NSHA

Total: 1

Page: 1 of 10

3. **Return to the Event Worksheet** by closing the **View Consent for Service**

## 6.4 Recording Immunizations

Users should review the client's information and then immunize through the **Assess and Immunize** function.

### 6.4.1 Assess and Immunize

The Mass Immunization Event - **Assess and Immunize** screen allows a User to choose and view pertinent immunization-related information on a specific client for assessment purposes as well as for documentation.

1. To work in an individual client record, the User selects the client to be assessed from the Event Worksheet then clicks **Assess and Immunize**.

Displaying 7 out of 7 clients

		Record Consent	Record Immunization	Client Event Status	Client Event Summary	Deferrals	Preview Client
		View Consent	Update Client	Generate Letters	Assess and Immunize		
<input type="checkbox"/>		Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status
<input checked="" type="checkbox"/>		42	Winter, Wanda	2005 Feb 24	Female	Men-CACYW-...	Due

- The **Assess and Immunize** screen now displays with the individual student In Context. The nurse can now review the clients information including immunization history, view consents, client warnings, special considerations, deferrals, allergies, and AEFI information. Clinical notes are accessible from the x symbol above the client id.



### **Tip: Assessing the Client**

A checkmark in the tab indicates that there is information recorded for the client. Click on the tab to review the specific information.

**Assess and Immunize**    Return    Record Consent    Record Immunization    Add to WQ    Actions    ?

Client ID: 42    Name (Last, First Middle)/Gender: Winter, Wanda / Female    Health Card No: 0091000000    Date of Birth / Age: 2005 Feb 24 / 12 years 8 months    **Active**

Phone Number: 1-(902)-667-5673 (Primary home)    Jurisdiction Info: Northern Zone, Truro Public Health Office    Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Client Immunization Profile**    ✓    ↑

Immunization History    ✓ Forecast by Agent    ✓ Forecast by Disease    ✓ Client Event Summary    Antigen Count

View Consent    Client Warnings    Special Considerations    Deferrals    Allergies    AEFI    IHI

When the user had completed the review of the client information, return to the **Event Worksheet**.

**Assess and Immunize**    **Return**    Record Consent    Record Immunization    Add to WQ    Actions    ?

Client ID: 42    Name (Last, First Middle)/Gender: Winter, Wanda / Female    Health Card No: 0091000000    Date of Birth / Age: 2005 Feb 24 / 12 years 8 months    **Active**

Phone Number: 1-(902)-667-5673 (Primary home)    Jurisdiction Info: Northern Zone, Truro Public Health Office    Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Client Immunization Profile**    ✓    ↑

Immunization History    ✓ Forecast by Agent    ✓ Forecast by Disease    ✓ Client Event Summary    Antigen Count

View Consent    Client Warnings    Special Considerations    Deferrals    Allergies    AEFI    IHI

## 6.4.2 Recording Immunizations

1. On the Worksheet, click the checkbox beside all the immunizing agents the student that will be having their immunization recorded for. Select **Record Immunization**.

Displaying 7 out of 7 clients

Record Consent **Record Immunization** Client Event Status Client Event Summary Deferrals Preview Client

View Consent Update Client Generate Letters Assess and Immunize

	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted	Client refusal
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due	Granted	Client refusal
<input checked="" type="checkbox"/>	41	Spring, May	2005 Nov 15	Female	Men-C-ACYW-...	Due	Granted	---
<input checked="" type="checkbox"/>	41	Spring, May	2005 Nov 15	Female	HPV-4	Due	Granted	---

2. On the Record Immunization screen, select each immunizing agent in the list that appears, enter **Date Administered**, **Time**, and **Site** then click **Save**. Note: the provider should default to you.

**Record Immunization**

Clients: Spring, May

\* Date Administered: 2017 Nov 21

Time Administered:

☐ Leave blank

☒ Enter time: 15:00

☐ Use current time

A Provider is not set up for the logged-in user. Non-provider recorded mode is applied.

Immunizing Agent	Lot Number	Trade Name	Route	Dosage	Site	Provider
<input checked="" type="checkbox"/> HPV-4	M006158 Exp. 2018 Nov 03	Gardasil	Intramuscular	0.5	---	PIEK, KRISTA LEIGH
<input checked="" type="checkbox"/> Men-C-ACYW-135	TSTM13048Z Exp. 2018 Nov 19	Menveo	Intramuscular	0.5	---	PIEK, KRISTA LEIGH

Arm

Arm: upper left

Arm: upper right

Save Reset

- All immunizations that are recorded for this student will now show up in their **Event Status** column as **Immunized**.

Event Worksheet

Event Title: TruroJRHS\_Grade7\_November2017

Event Date: 2017 Nov 13 , 2017 Nov 14

Event Type: School Immunization

Event ID: 9

Location: Truro Junior High School

Status: Open

Created By: PERMISSIONS, ALL

Displaying 7 out of 7 clients

Record Consent

Record Immunization

Client Event Status

Client Event Summary

Deferrals

Preview Client

View Consent

Update Client

Generate Letters

Assess and Immunize

		Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
					Filter	Filter	Filter	Filter	Filter
		43	Autumn, Andrew	2005 Sep 27	Male	Men-CACYW-...	Due	Granted	---
		43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted	Client refusal
		45	Cloud, Rodney	2005 Aug 05	Male	Men-CACYW-...	Due	Granted	---
		45	Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due	Granted	Client refusal
		41	Spring, May	2005 Nov 15	Female	Men-CACYW-...	Due	Granted	Immunized
		41	Spring, May	2005 Nov 15	Female	HPV-4	Due	Granted	Immunized
		46	Storm, Henry	2005 Mar 21	Male	Men-CACYW-...	Due	Granted	Immunized
		46	Storm, Henry	2005 Mar 21	Male	HPV-4	Due	Granted	Immunized



### Tip: Forecast Status

Once a client's **Event Status** changes to **Immunized**, the **Forecaster** will update based on the new immunization record. This usually takes up to two minutes to refresh.



### Tip: Client Alerts

Panorama provides alerts next to a client's name if the client has any **Warnings**, **Special Considerations**, or **Clinical Notes**.



### Tip: Immunized Status

Once an immunization is recorded via the Mass Immunization Worksheet, the status will update to 'Immunized' and cannot be changed.

If the immunization was recorded in error, it can be deleted from the individual client's standard Immunization screen. (Go to **Left Hand Navigation**, then to the **Immunization** section, then to **Record & Update Immunization**. Select the erroneous immunization and delete).



**Tip: Cancel Button**

At any time, if you need to return back to the Mass Immunization Event Worksheet (from almost any screen), click the **Cancel** button. To exit the Mass Immunization Worksheet screen, click Cancel Worksheet.



**IMPORTANT**

Immunizations removed from the standard Immunization screen will be removed from the client record but will still show up as “Immunized” in the Event Worksheet.



**Tip: Provider Recorded and Non-Provider Recorded Immunizations**

If the User logged in is a Provider and is added as one of the **Providers** in the **Mass Immunization Event**, the logged-in User will be defaulted under **Provider** in the figure above. This will be documented as a **Provider Recorded Immunization**.

## 6.5 Updating the Mass Immunizations Event Status

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The **Update Event Status** button allows a User to update an individual client’s Event Status or update a group of clients at one time. By default, all Event Statuses are set to “-----”, if no action has been recorded in the Mass Immunization Worksheet. This can be done prior to or during the immunization event as the information is available or the action is performed.

Event Worksheet									
View Consent		Update Client		Generate Letters		Assess and Immunize			
Launch Report		Additional Actions		log					
		Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
					Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>		43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>		43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted	---
<input type="checkbox"/>		45	Cloud, Rodney	2005 Aug 05	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>		45	Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due	Granted	---
<input type="checkbox"/>		41	Spring, May	2005 Nov 15	Female	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>		41	Spring, May	2005 Nov 15	Female	HPV-4	Due	Granted	---
<input type="checkbox"/>		46	Storm, Henry	2005 Mar 21	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>		46	Storm, Henry	2005 Mar 21	Male	HPV-4	Due	Granted	---
<input type="checkbox"/>		40	Summer, Susan	2005 Jan 06	Female	Men-C-ACYW-...	Due	Missing	---
<input type="checkbox"/>		40	Summer, Susan	2005 Jan 06	Female	HPV-4	Due	Missing	---
<input type="checkbox"/>		44	Sunshine, Elissa	2005 Jun 10	Female	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>		44	Sunshine, Elissa	2005 Jun 10	Female	HPV-4	Due	Granted	---
<input type="checkbox"/>		42	Winter, Wanda	2005 Feb 24	Female	Men-C-ACYW-...	Due	Missing	---
<input type="checkbox"/>		42	Winter, Wanda	2005 Feb 24	Female	HPV-4	Due	Missing	---

To change the **Event Status** of clients in the **Worksheet**, complete the following steps:

1. Select the Client and all their Immunizing Agents for whom you wish to update their Event Status then click **Client Event Status**. Select a **Client Event Status** from the dropdown list:
  - Absent for immunization
  - Client refusal
  - Contraindication
  - Exemption (Presumed immune)
  - Moved out of school
  - No parental consent
  - Previous immunization



**Event Worksheet** Launch Report ▼ Add

**Update Client Event Status** ✕

**Clients:**  
Autumn, Andrew

**Client Event Status will be updated for:**  
☒ HPV-4  
☒ Men-C-ACYW-135

**\* Client Event Status:**  
 🔍

Save Reset

**Generate Letters** **Assess and Immunize**

Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status
Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due
Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due
Cloud, Rodney	2005 Aug 05	Male	Men-C-ACYW-...	Due
Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due

Absent for immunization  
 Client refusal  
 Contraindication  
 Exemption  
 Immunization deferred  
 Moved out of school  
 No parental consent  
 Previous immunization

2. Click **Save**.

**Update Client Event Status** ✕

**Clients:**  
Autumn, Andrew

**Client Event Status will be updated for:**  
☒ HPV-4  
☐ Men-C-ACYW-135

**\* Client Event Status:**

Save Reset

- The column **Event Status** will update according to the selected **Event Status**.

<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted	Client refusal

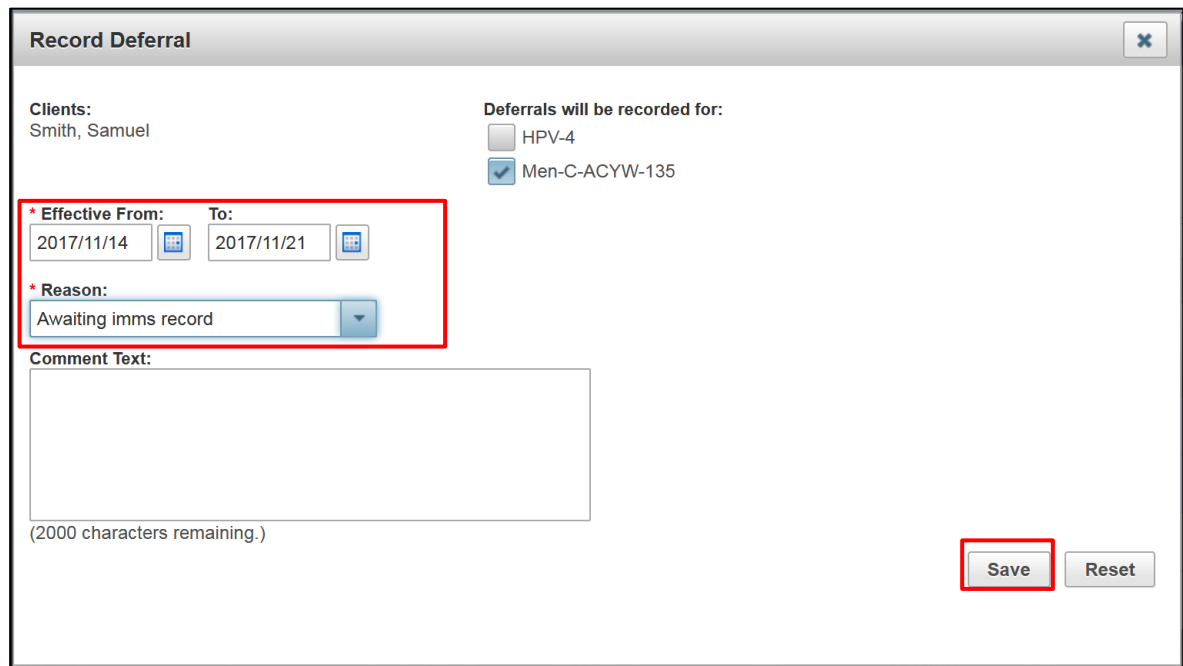
## 6.6 Deferring a Client

Deferrals should be documented into the event worksheet during the event.

- To create a deferral, select the student and all applicable agents, click **Deferrals**.

Displaying 8 out of 8 clients								
Record Consent		Record Immunization		Client Event Status		Client Event Summary		Deferrals
View Consent		Update Client		Generate Letters		Assess and Immunize		Preview Client
<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Granted	Immunized
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Granted	Client refusal
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male	Men-C-ACYW-...	Due	Granted	Immunized
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due	Granted	Client refusal
<input checked="" type="checkbox"/>	48	Smith, Samuel	2005 Nov 01	Male	Men-C-ACYW-...	Due	Missing	---



2. Enter the **Effective Date** as today's date and select **Reason**, then **Save**.




**Record Deferral**

Clients:  
Smith, Samuel

Deferrals will be recorded for:  
☐ HPV-4  
☒ Men-C-ACYW-135

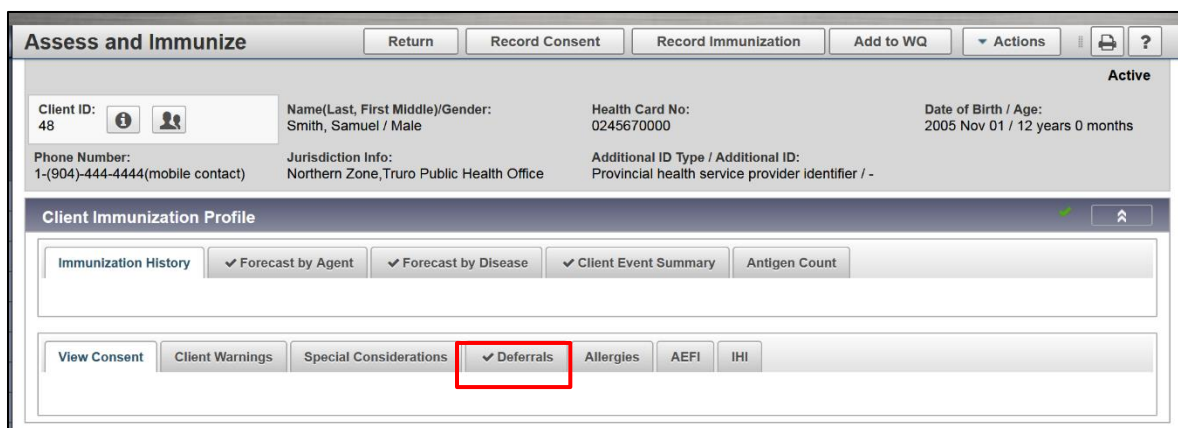
\* **Effective From:** 2017/11/14  **To:** 2017/11/21 



\* **Reason:**  
 Awaiting imms record 

**Comment Text:**  
 (2000 characters remaining.)



**Save** **Reset**

3. A Deferral will be created, and the event status for the impacted client(s) will change to Deferral. The Deferral may be reviewed on the **Assess and Immunize** screen.







**Assess and Immunize** **Return** **Record Consent** **Record Immunization** **Add to WQ** **Actions**  


**Active**

Client ID: 48   Name(Last, First Middle)/Gender: Smith, Samuel / Male Health Card No: 0245670000 Date of Birth / Age: 2005 Nov 01 / 12 years 0 months

Phone Number: 1-(904)-444-4444(mobile contact) Jurisdiction Info: Northern Zone, Truro Public Health Office Additional ID Type / Additional ID: Provincial health service provider identifier / -

**Client Immunization Profile** 

Immunization History  Forecast by Agent  Forecast by Disease  Client Event Summary Antigen Count

View Consent Client Warnings Special Considerations  **Deferrals** Allergies AEFI IHI

## **6.7 Managing Vaccine Wastage**

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During an immunization event, some doses of a vaccine may be 'wasted' as the client receives immunizations, and in situations where a portion of the vaccine is spoiled, spilled, or drawn, but with no further clients left to immunize. The vaccine wastage information is required to account for doses removed from inventory that are not administered to clients or returned to the provincial supplier, as well as to monitor vaccine handling and management practices.

All users will continue to follow the existing manual process in Nova Scotia for recording and tracking vaccine wastage.