



P16-0371 Panorama Project

**Panorama Immunization Management User
Manual**

**PNS IMM 104 Immunization Management
Reports**

Version V1.0

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1 PURPOSE

This user manual will provide an overview of the Immunization Management standard reports. It is intended for all prospective Panorama users identified as nurses, clerks, Medical Officers of Health (MOHs), and Epidemiologists.

Only two of the standard reports are included in the current NS immunization management processes.

1. Client Immunization Record
2. Immunization Coverage by Age

1.1 Standard Reports Permissions

Reports Code	Report	IMMS NURSE	IMMS Clerk	MOH	EPI
IR6800	Client Immunization Record	X	X	X	X
R6036	Immunization Coverage Report by Age	X	X	X	X

1.2 Custom Report Permissions

The custom reports and roles are listed in the table below. All roles have been assigned permissions for this set of reports.

Report	IMMS NURSE	IMMS Clerk	MOH	EPI
AEFI Statistics Report	X	X	X	X
Coverage by School	X	X	X	X
Immunization Statistics by Location	X	X	X	X
Mass Immunization Registration Sheet	X	X	X	X
Mass Immunization Event Report	X	X	X	X
Pick-Up List Report	X	X	X	X

1.3 Adhoc Report Permissions

The epidemiologists will run the Adhoc reports. Instructions are not included in this user guide.

Adhoc Reports Permissions	Permission Descriptions	IMMS NURSE	IMMS Clerk	MOH	EPI
Reports_Delete_Query_(Data Source)	Delete a query scheduled instance for a specific data source. The user that created the query must have this permission in order to delete.				X
Reports_Schedule_Query_(Data Source)	The user can create, modify or delete an Adhoc report schedule based on the report source				X
Reports_View_Instance_(Data Source)	The user may view a scheduled instance of the Ad Hoc report based on the report data source				X
SS_Launch_Adhoc_Editor	User can launch the SAP BI Launch Pad application				X

2 STANDARD REPORTS

The Panorama Immunization Module contains eight standard reports. Only two reports will be used by Nova Scotia, this section provides an introduction to the two reports to be used by Nova Scotia Users.

2.1 Client Immunization Record (IR6800)

The purpose of the Client Immunization Record Report is to print the record of a client's immunizations. The client Immunization Record contains all the documented vaccinations that have been recorded for a specified client in the system.

The Record Report displays selected client demographic data elements and vaccination detail data elements. It may optionally also include Special Considerations (i.e. Contraindications, Exemptions, Precautions), as well as any Adverse Event Following Immunization (AEFI), Allergies, the client's current Immunization Forecast, Deferrals and a summary of the client's Invalid Immunizations.

The Record Report may be provided upon completion of a vaccination. The printed Record Report may be requested by the client for the client's personal records. It may also be requested in some jurisdictions as evidence of Immunizations.

1. If the Client is not In Context, go to the Search screen and search for the client.
2. Once the client is located, select the client in the **Search Results Table** and click **Client Imms Profile**. This will set the client In Context and display the **Client Immunization Profile** screen.
3. To generate the **Client Immunization Record**, click **Launch Report**.



The screenshot shows the 'Client Immunization Profile' interface. At the top right, there are buttons for 'Launch Report', 'Add to WQ', 'Save', and 'Reset'. The 'Launch Report' button is highlighted with a red box. Below the buttons, there is a section for client information:

Client ID: 42	Name (Last, First Middle)/Gender: Winter, Wanda / Female	Health Card No: 0091000000	Date of Birth / Age: 2005 Feb 24 / 12 years 9 months
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 / -	

4. A Launch Report pop-up will display that lists Report IR6800. Click **Confirm**.

Launch Report ✕

* Report:

IR6800 ▼

Confirm

5. Select the required report filters. The filters default to **Yes**. **Change the defaults to No**. Some sections contain personal information that should not be included in the report.

- **Note:** PDF is the supported format and is the right format for printing. The report may also be generated in Excel. If opening in Excel, a pop-up will display, asking if the User to either open with Excel or Save the file.

* Required field

Report Filters: IR6800-Client Immunization Record ⤴ Hide Report Filters

* Report Output PDF (Supported Format)

Crystal Report
 Excel
 Excel (Data Only)

* Language English ▼

* Client ID 200

* Exclude Confidential Address/Phone Information No ▼

* Include Immunization Forecast No ▼

* Include Invalid Immunizations Summary No ▼

* Include Deferrals No ▼

* Include Special Considerations No ▼

* Include Adverse Events No ▼

* Include Allergies No ▼

* Include Risk Factors No ▼

Generate Report

Schedule Report

Clear

Cancel

6. Click **Generate Report**.

7. The report will display.

Where Created: NSHA 

Client Immunization Record

Report as of Date/Time 2018 Jan 03 15:14

Personal Information

Client ID 200	Health Card Number 6677889929
Client Name Fall, Autumn	Gender Female
Date of Birth 2005 May 15	Client Telephone
Province/Territory	Postal Code

Immunization Agent	Immunization Date
HB-regular	2017 Dec 14
HPV-4	2017 Dec 14
Pneu-P-23	2017 Dec 14

E - The date is estimated for this historical immunization.
 O - The status for this immunization has been overridden.
 X - Some or part of the vaccine did not meet local schedule.
 R - The dose number for this immunization has been revised.

Eligible The client has reached or is past the eligibility date, but is not yet due for the immunization.

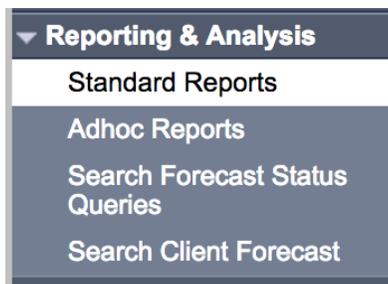
8. To print the report, click the printer icon in the top right-hand corner of the screen.



2.2 Immunization Coverage Report by Age (R6036)

Coverage reports are used to assess the population for: complete vs. incomplete immunizations against vaccine preventable diseases by jurisdictional recommendations according to parameters such as date of birth range, gender and geographic location, including the jurisdictional organization structure.

1. Under Reporting & Analysis, select **Standard Reports**.



2. Select **Report Type**.



- Under Immunization, click **Show Report Folders**. The Immunization reports will display.
- Click on the **R6036 – Immunization Coverage Report by Age** hyperlink.

Immunization ✓ Contains Data ⤴ Hide Report Folders		
Select Report title to view / modify a report and its filters. Select Report Status Link to view scheduled status of own and workgroup reports. Select Report History Link to view history of own and workgroup reports.		
Operational Forms and Lists	Status of this Report	History of this Report
IR51410-Client Forecast for Event by Component Antigen	Report Status	Report History
IR6000-Reminder Recall Client List	Report Status	Report History
IR6022-Immunization Worksheet	Report Status	Report History
IR6800-Client Immunization Record	Report Status	Report History
R6016-Client List by Jurisdiction, Service Delivery Location, or School	Report Status	Report History
R6036-Immunization Coverage Report By Age	Report Status	Report History
R6042-Count of Immunized Clients by Number of Valid Doses	Report Status	Report History

- Populate each field.
- PDF is the supported format, but the report may also be generated in Excel.

Report Filters: R6036-Immunization Coverage Report By Age ⤴ Hide Report Filters

*** Report Output** PDF (Supported Format)
 Crystal Report
 CSV
 Excel
 Excel (Data Only)
 Text

*** Language** English v

Jurisdictional Organization NSHA [Clear / Search](#)

Province Nova Scotia v

City
 Available Items: Alders Landing, Abercrombie, Aberdeen, Abrams River, Acaciaville, Academy, Addington Forks, Admiral Rock
 Selected Items: Bridgewater
[Add Filter >>](#)
[<< Remove Filter](#)

Postal Code FSA

Postal Code

*** Gender**
 Available Items:
 Selected Items: Female, Male, Undifferentiated, Unknown
[Add Filter >>](#)
[<< Remove Filter](#)

*** Date of Birth From** 1999 9 1 v
 yyyy mm dd

*** Date of Birth To** 2009 9 1 v
 yyyy mm dd

Denominator Value

*** Immunizing Antigen**
 Available Items: Bacillus Calmette Guerin (BCG), Botulism antitoxin, Cholera (Chol-IM), Cholera (Chol-O), Cholera (Chol-u), Diphtheria (D), Diphtheria (d), Diphtheria (d-u)
 Selected Items: HPV-4
[Add Filter >>](#)
[<< Remove Filter](#)

Generate Report
Schedule Report
Clear
Cancel

7. Click **Generate Report**.



Tip: If Jurisdictional Organization, Province, and a City are selected, a warning will generate.

Immunizing Antigen HPV-4
Only one of Jurisdictional Organization, Province/City, Postal Code or Postal Code FSA may be selected.

8. The report is generated. An example is listed below.

Where Created NSHA


Immunization Coverage Report By Age

Jurisdictional Organization NSHA	City -
Province Nova Scotia	Postal Code FSA -
Postal Code -	Date of Birth To 2009-Sep-01
Date of Birth From 1999-Sep-01	
Gender Female, Male, Undifferentiated, Unknown	
Denominator Value -	
Immunizing Antigen HPV-4	

Nova Scotia Health Authority

Population	Complete for Age for All Antigen(s) Selected		Incomplete for Age		Exemption - Refusal of All Antigen(s) Selected		Unimmunized - No Immunization Record	
	Count	%	Count	%	Count	%	Count	%
0								

Immunizing Antigen	Clients With												Special Considerations					
	Complete for Age for Antigen		1 dose +		2 doses +		3 doses +		4 doses +		5 doses +		6 doses +		Contraindication	Exemption - Refusal	Exemption - Immunity	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
HPV-4	56	100.0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%

Central Zone

Population	Complete for Age for All Antigen(s) Selected		Incomplete for Age		Exemption - Refusal of All Antigen(s) Selected		Unimmunized - No Immunization Record	
	Count	%	Count	%	Count	%	Count	%
0								

Immunizing Antigen	Clients With												Special Considerations					
	Complete for Age for Antigen		1 dose +		2 doses +		3 doses +		4 doses +		5 doses +		6 doses +		Contraindication	Exemption - Refusal	Exemption - Immunity	
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%
HPV-4	56	100.0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%

Confidential
Page 1 of 3

3 CUSTOM REPORTS

In addition to the standard reports, six custom reports have been developed to meet the reporting needs of Nova Scotia.

3.1 AEFI Statistics Report

This report aggregates data on AEFI submitted through Panorama. Statistics are presented into four distinct sections:

- AEFI Statistics by Status
- Reporter Statistics by Status
- AEFI Statistics by Reaction (Review Completed Only)
- AEFI Statistics by Outcome (Review Completed Only)

AEFI Statistics Report		Health Region: All							
Period From:	2017-09-01	To:	2017-11-14	Report Date	2017-11-15				
Linked Immunizations:		HPV-4, HB-regular, Tdap, Men-C-ACYW-135							
AEFI Statistics by Status									
Agent	Trade Name	Lot Number	Draft	In Review	Complete	DNMTC	Disregard		
HPV-4	Gardasil				2				
HB-regular					2				
Tdap					1				
Men-C-ACYW-135					1				
Total distinct AEFI					3				
Reporter Statistics by Status									
Last Name	First Name	Role	Draft	In Review	Complete	DNMTC	Disregard		
Fitzgerald	Angela	Epidemiologist		24	3	0	4	12	
Oliver	Gertrude	Registered Nurse	0		4	20	1	0	
AEFI Statistics by Reaction (Completed Only)									
Agent	Trade Name	Lot Number	Local	Anaphylaxis/Allergic	Neurological	Other			
HPV-4	Gardasil								
HB-regular									
Tdap									
Men-C-ACYW-135									
Total distinct AEFI									
AEFI Statistics by Outcome (Completed Only)									
Agent	Trade Name	Lot Number	Death	Fully-Recovered	Not recovered	Disability/Incapacity	Unknown		
HPV-4	Gardasil								
HB-regular									
Tdap									
Men-C-ACYW-135									
Total distinct AEFI									

3.2 Coverage by School

The Coverage by School Report is a two-part report:

Part 1 is a modified R6036 – Immunization Coverage Report by Age where the population is a school organization (with the option to restrict to a specific grade and class).

Part 2 is a table listing of the members of the population (students) with an immunization status that is not complete for age.

Filters

- School Organization (filter on client occupation/education) [Mandatory]
- School Year [Mandatory, default to current school year]
- Grade [Optional]
- Class [Optional]
- Immunizing Antigens – multi-select [Mandatory]
- Option to select by agents or agent groups instead: all corresponding immunizing antigens are then selected for the report

Report Output Type

- Excel
- PDF

3.3 Immunization Statistics by Location

This report presents two tables:

- Number of immunizations administered by a JORG, broken down by Service Delivery Location (SDL)
- Number of encounters of type “administer immunization” associated with selected JORG, broken down by SDL

3.4 Mass Immunization Registration Sheet

This report provides users with the option to create a print out of a mass immunization event client list that can be used to track client clinic attendance. It also includes space for comments. This report may be printed before each clinic and will serve as a back-up in case Panorama is not accessible. A sample of the report is listed below.

Mass Immunization Event Registration Sheet							<i>Print separate table for each class</i>		
SDL:		Service Delivery Location Name				Clinic Date:		2017-11-22	
Class:		Class Name/Number				Last Updated:		2017-11-17	
Present	Absent	Consent #	Last Name	First Name	Sex	Class	DOB yyyy/mm/dd	Comments	
		1							
		2							
		3							
		4							
		5							
		6							
		7							
		8							
		9							
		10							
<i>Add empty rows at the bottom to fill page (add extra page if less than 4 blank rows)</i>									
Page X of Y (restart numbering for each class)									

3.5 Mass Immunization Event Report

This report provides a summary of immunizations planned versus administered, and includes a count by client event status for a selected Mass Immunizations Event. A sample of the report layout is listed lower down in this section.

Filters

- Mass Immunization Event

Allows users to search for a mass immunization event by the Event ID

Report Output Type

- Excel
- PDF



NOTE 1: Use landscape orientation for this report



NOTE 2: Ideally, try to fit height on 1 page (can break across multiple pages if too many columns for width)

Mass Immunization Event Report				
Mass Imms Event Name	Start	End	Created By	
Clinic Dates	2017-09-12	2017-10-30	Gertrude Oliver	
Report Date	2017-11-17			
Client Event Status Summary	HB-regular	HPV-4	Men-C-ACYW-135	Tdap
Immunized	10			
Previous immunization	2			
Exemption (Presumed Immune)	1			
Sub-Total: Up to date	13			

Absent for immunization				
Client refusal				
Contraindication				
Deferred				
Lost to follow-up				
Moved out of school				
No parental consent				
Sub-Total: Missing				
Total				

3.6 Pick-Up List Report

The Pick-Up List Report lists students with overdue vaccines, and lists the overdue vaccines. It will facilitate identifying students that require pick-up following a Mass Imms School Event, and will support planning and delivering pick-up vaccines for all vaccines delivered as part of the school program.

The user will enter an Event ID.

The report may be generated in PDF or CSV and/or Excel.

Note: A report prototype is pending.