



## **P16-0371 Panorama Project**

# **Panorama Immunization Management User Manual**

## **PNS IMM 202 – Mass Immunization Events**

Version 2.0

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# TABLE OF CONTENTS

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<b>1</b>	<b>PURPOSE</b> .....	<b>1</b>
<b>2</b>	<b>MASS IMMUNIZATIONS OVERVIEW</b> .....	<b>2</b>
2.1	GENERAL MASS IMMUNIZATIONS .....	3
2.2	SCHOOL MASS IMMUNIZATIONS .....	4
2.2.1	<i>Private School Mass Immunizations</i> .....	4
2.2.1	<i>Public School Mass Immunizations</i> .....	5
2.3	SEARCHING AND CREATING MASS IMMUNIZATION EVENTS .....	6
2.4	ADDING A CLIENT LIST .....	11
2.4.1	<i>Search Clients</i> .....	12
2.4.2	<i>Upload Client List</i> .....	15
2.5	UPDATING MASS IMMUNIZATION EVENTS .....	15
2.5.1	<i>Schedule Forecast</i> .....	16
2.5.2	<i>Update Clients</i> .....	16
2.5.3	<i>Add Clients</i> .....	17
2.5.4	<i>Delete Client</i> .....	18
2.5.5	<i>Preview Client</i> .....	18
2.5.6	<i>Open/Cancel/Complete Event</i> .....	19
2.5.7	<i>Updating Event Details</i> .....	19
2.6	USING THE IMMUNIZATION WORKSHEET .....	20
2.7	RECORDING CONSENT .....	23
2.8	UPDATING THE MASS IMMUNIZATIONS EVENT STATUS .....	24
2.9	DEFERRING A CLIENT.....	27
2.10	RECORDING IMMUNIZATIONS .....	29
2.10.1	<i>Recording Immunizations for one or multiple clients at a time</i> .....	29
2.10.2	<i>Assess and Immunize</i> .....	32
2.11	MANAGING VACCINE WASTAGE .....	34
2.12	CLIENT PICK UPS .....	35
2.13	MASS IMMUNIZATION EVENT REPORT .....	35
2.14	CLOSING THE EVENT .....	35

## 1 PURPOSE

The purpose of this course is to provide detailed instructions on how to manage mass immunization events in Panorama. The focus in this course is on identifying the data necessary for the creation and use of mass immunization events by clerical and clinical staff. This course is intended for all prospective Panorama users; however, depending on a user's role, e.g., clerk, nurse, not all sections may be required for training or daily responsibilities.

After completing the course, users should be able to:

- Search for and create general mass immunization events, e.g., a flu clinic
- Search for and create school mass immunization events
- Maintain and use school mass immunization events

## 2 MASS IMMUNIZATIONS 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.

This document will cover the following:

1. Regular Mass Immunizations
2. School Mass Immunizations (public and private schools)
3. Searching and Creating Mass Immunization Events
4. Adding a Client List
5. Updating Mass Immunization Events
6. Mass Immunization Worksheet
7. Mass Immunization Communication Template
8. Recording Consent
9. Updating Event Status
10. Recording Immunizations
11. Mass Immunization Reports
12. Completing Events

***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.

## 2.1 General Mass Immunizations

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### **Mass Immunizations Process**

The **Mass Immunizations** process defined below are for Outbreaks, Flu clinics, and other outreach campaigns. Please note that the following are high level steps and users should consult with the Nova Scotia Standard Operating Procedures document for detailed guidance.

### **Prior to Event**

1. Create a list of clients taking part in the **Mass Immunization Event** (if known) and format the list according to the Panorama-friendly template provided by NS. Save the file as a **.txt** file ready to be uploaded into the Mass Immunization Event. The steps are covered in more details in CLT 103.
2. Create a **Mass Immunization Event**, adding the **Event Date(s)**, **Immunizing Agents**, and **Providers**. Name the event according to the NHTSA naming convention identified in the SOP: **zone-venue-agent-date** (e.g., WZ-SiteName-MenB-YYMMDD).
3. Work with the Biological Coordinator to ensure sufficient immunization products have been ordered from the Bio Depot, and to ensure the products are moved to the correct **Holding Point Location** for the clinic.
4. From Update Mass Immunization Event screen, add a **Client List** by **Uploading the Client Upload Template**.
5. Update Mass Immunization Event recording and any additional Providers or Immunizing Agents.
6. On the morning of the event, update the mass immunization event and click Use Auto-Decrementing in this event. Select the Holding Point and Holding Point Location. Click Save.

### **During Event**

1. Select a client from the Client list in the **Mass Immunization Event Worksheet**, determine presence, document consent (if not already documented during registration process), assess to determine need for deferral or a Special Consideration that prevents immunization, and then proceed with immunization if applicable.
2. Update Mass Immunization Event Worksheet with immunization(s). Repeat.

### **After Event**

1. Review Immunization Coverage Report to determine if an additional Mass Immunization Event date needs to be booked and a new Mass Immunization Event created for remaining clients/students/employees or immunizations requiring a second dose.

2. Mass Immunization Event is marked as Completed.

## 2.2 School Mass Immunizations

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School Mass Immunizations are mass campaigns that occur in the schools. Whether a school is a NS public or private school, the steps to creating and implementing a mass campaign on Panorama are similar although not identical. The following sections outline the process for each type of school mass immunization (clinic) event.

### 2.2.1 Private School Mass Immunizations

The high-level steps to create a school clinic/mass immunization event in Panorama are as follows (please note that users should consult with the Nova Scotia Standard Operating Procedures document for detailed guidance):

#### Prior to Event

1. Create a list of students taking part in the Mass Immunization Event. For Private Schools, a list will be obtained from each school using the **Panorama Client Upload** template provided by NS. Save this file as a \*.txt file ready to be uploaded.
2. Create a Mass Immunization Event, adding the event date(s), immunization agents, and Providers. Name the school clinic event according to the NHSA naming convention identified in the SOP: **zone-venue-date** (e.g., WZ-SchoolName-YYMMDD).
3. Work with the Biological Coordinator to ensure sufficient immunization products have been ordered from the Bio Depot, and to ensure the products are moved to the correct **Holding Point Location** for the clinic.
4. Upload \*.txt file into newly created mass immunization event. See **PNS CLT 103 - Client Upload Template** for further details on uploading client lists.
5. Once returned to the Mass Immunization Event, and the **Client List** will be displayed.
6. Request consents from parents through the school (school will distribute hard copy consents and Public Health will coordinate pick up) and record consent in the individual client record. Hard copies of the consent will be returned to public health for storage and may be used to document immunizations in the event of a system downtime.
7. Update Mass Immunization Event recording consents for each student.
8. On the morning of the event, update the mass immunization event and click Use Auto-Decrementing in this event. Select the Holding Point and Holding Point Location. Click Save.

### **During event**

9. Select a student from the **Client List** in the **Mass Immunization Event Worksheet**, determine presence, verify consent, assess to determine need for deferral or exemption then proceed with recommended immunization(s).
10. Update **Mass Immunization Event Worksheet** with student's assessment and immunization(s). Repeat.

### **After event**

11. Review **Immunization Coverage Report** to determine if an additional **Mass Immunization Event** date needs to be booked.
12. Mass Immunization Event is marked as **Completed** only when all students have been immunized, or when pick-ups are completed, or when no additional immunizations can be administered to the students on the original list.

## ***2.2.1 Public School Mass Immunizations***

Please note that the following are high level steps and users should consult with the Nova Scotia Standard Operating Procedures document for detailed guidance.

### **Prior to Event**

13. Create a Mass Immunization Event, adding the event date(s), immunization agents, and Providers. Name the school clinic event according to the NHSA naming convention identified in the SOP: **zone-venue-date** (e.g., WZ-SchoolName-YYMMDD).
1. Work with the Biological Coordinator to ensure the immunization agents have been ordered from the Bio Depot, and to ensure the products are moved to the correct **Holding Point Location** for the clinic.
2. Students in the public-school system will be added to Panorama through regular uploads from the Nova Scotia Student Information System (NS-SIS), and lists can be generated through Advanced Client Searches.
3. From the **Update Mass Immunization Event** screen, the client list can be searched. Using the Advanced Search functionality under Search Client, users can enter the specific school and grade for immunization. It is recommended that class not be used as a search parameter as all students in the grade will require immunization.
4. Request consents from parents through the school (school will distribute hard copy consents and Public Health will coordinate pick up) and record consent in the individual client record. Hard copies of the consent will be returned to the school for storage and may be used to document immunizations in the event of a system downtime.

5. Update Mass Immunization Event recording consents for each student.
6. On the morning of the event, update the mass immunization event and click **Use Auto-Decrementing** in this event. Select the **Holding Point** and **Holding Point Location**. Click Save.

#### During event

7. Students that attend the immunization event with a signed consent but who are not on the list will be added by the Clinic Lead.
8. Select a student from the **Client List** in the **Mass Immunization Event Worksheet**, determine presence, verify consent, assess to determine need for deferral or exemption then proceed with recommended immunization(s).
9. Update **Mass Immunization Event Worksheet** with student's assessment and immunization(s). Repeat.

#### After event

10. Review **Immunization Coverage Report** to determine if an additional **Mass Immunization Event** date needs to be booked.
11. Mass Immunization Event is marked as **Completed** only when all students have been immunized, or when pick-ups are completed, or when no additional immunizations can be administered to the students on the original list.

## 2.3 Searching and Creating 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** and **Create** a new 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.



**Search Mass Immunization Event** [Search] [Retrieve] [Reset] [Print] [Help]

**Search Mass Immunization Event** [Refresh]

Event ID:

Event Title:

Status:

Created By:

Event Type:

Event Date Range:

From:   To:

Organization:

Service Delivery Location:

**Search Results** [Refresh]

No search results.

2. Search for the mass immunization event using any of the parameters in the **Search Mass Immunization Event**.



**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**.

**Search Results** [Refresh]

[Update] [View] [Delete] [Worksheet]

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 [Previous] [Next]  [Refresh] [Page Size: 50]

3. If no **Search Results** are found, proceed with creating a new event by selecting **Create**.

**Search Mass Immunization Event** Search Retrieve Reset [Print] [Help]

**Search Mass Immunization Event** [Up Arrow]

Event ID:

Status:

Event Type:

Event Date Range:  
From:  To:

Organization:  [Info] [Search]

Service Delivery Location:  [Info] [Search]

Event Title:

Created By:

**No records were found matching the search criteria.**

**Search Results** [Up Arrow]

**Create**

4. The **Create Mass Immunization Event** screen displays. Required data fields are marked with a red asterisk (\*). Remember that the Clinic Lead will only click Auto-Decrement on the morning of the clinic when the Lot # is known.

**Create Mass Immunization Event** Launch Report Save Reset [Print] [Help]

**Mass Immunization Event** [Up Arrow]

\* Event Title:  Description:

\* Event Date To create a new record click Add.  Add

\* Status:

\* Event Type:

\* Organization:  [Info] [Search]

\* Service Delivery Location:  [Info] [Search]

**Use Auto-Decrementing** [Up Arrow]

Use Auto-Decrementing in this Event

\* Holding Point:

\* Holding Point Location:

\* Immunizing Agents To create a new record click Add.  Add

\* Event Providers To create a new record click Add.  Add

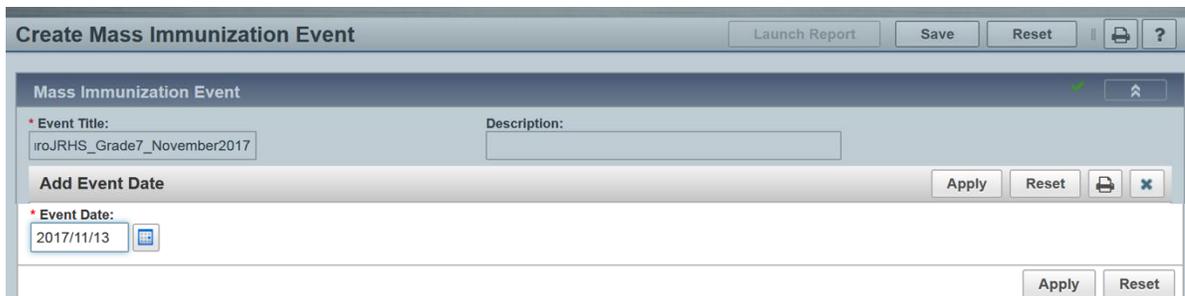
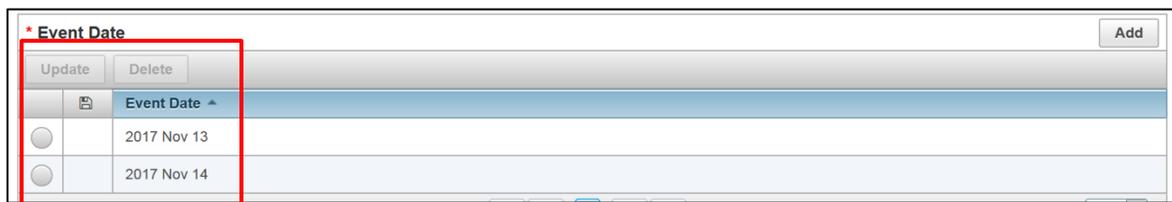
5. Enter the **Mass Immunization Event Details**:

- **Event Title:** Event title following the naming convention identified in the SOP (see **Sections 2.1 and 2.2**).

- **Event Type:** School Immunization
- **Status:** Defaulted to Open
- **Organization:** Defaulted to the User's Organization.
- **Service Delivery Location (SDL):** Defaulted to School Name or choose another.
- Select the **Use Auto-Decrementing in this Event** checkbox.
  - Select the **Holding Point**
  - Select the **Holding Point Location**
- Add **Event Date, Immunizing Agents, and Providers**, clicking **Add** for each. Although all Providers may not be known at the time the mass immunization event is created, adding the Clinic Lead as a Provider is the minimum and other providers can be added at a later date. If the creator of the mass immunization event is a Provider, they will automatically be added as a Provider for the event.

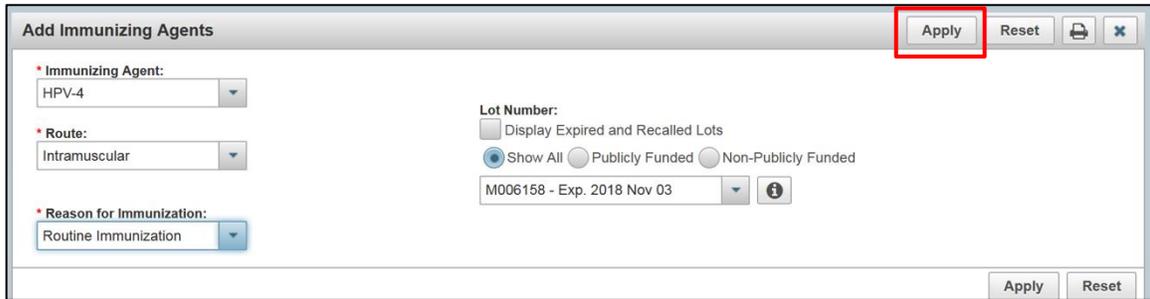
 **Tip: Multiple Event Dates**

To add multiple event dates, add each individual date separately. For example, if an event were to carry over two days from November 13-14, add November 13 and November 14 separately.

* Event Date		Add
Update	Delete	
<input type="checkbox"/>	Event Date	
<input type="radio"/>	2017 Nov 13	
<input type="radio"/>	2017 Nov 14	

6. Add **Immunizing Agents** by clicking **Add**. Enter **Immunizing Agent, Lot Number**, route **Repeat for each** immunizing agent. Lot # will generally not be known until the day before the clinic. The Clinic Lead will click Auto-Decrement on the morning of the clinic, add the Holding Point, Holding Point Location and Lot # for each agent.



**Add Immunizing Agents** Apply Reset Print Close

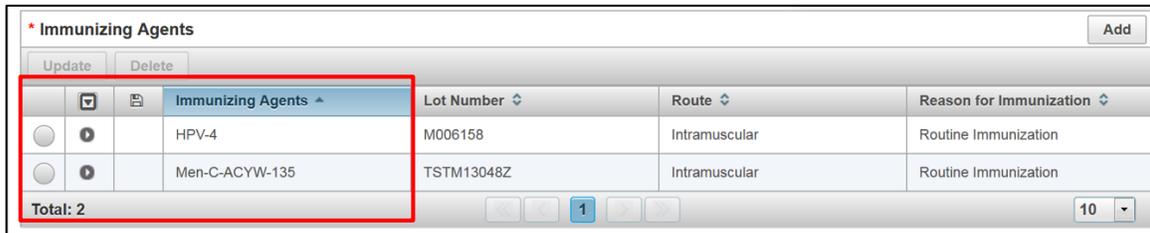
\* Immunizing Agent: HPV-4

\* Route: Intramuscular

\* Reason for Immunization: Routine Immunization

Lot Number:  
 Display Expired and Recalled Lots  
 Show All  Publicly Funded  Non-Publicly Funded  
 M006158 - Exp. 2018 Nov 03 i

Apply Reset



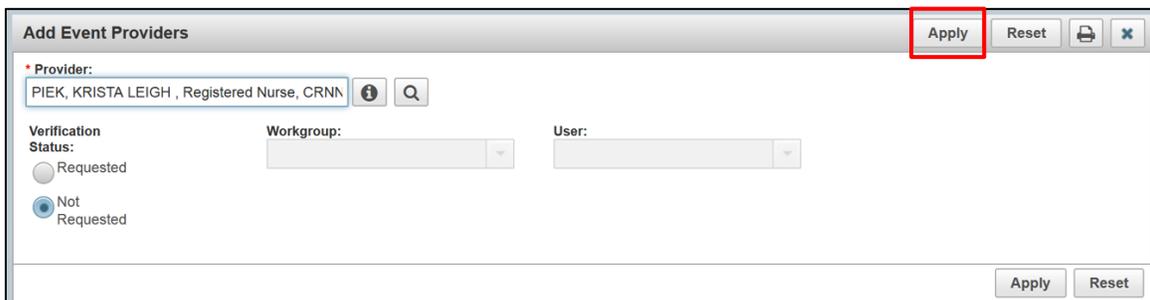
**\* Immunizing Agents** Add

Update Delete

	Immunizing Agents	Lot Number	Route	Reason for Immunization
<input type="radio"/>	HPV-4	M006158	Intramuscular	Routine Immunization
<input type="radio"/>	Men-C-ACYW-135	TSTM13048Z	Intramuscular	Routine Immunization

Total: 2 1 10

7. Add the **List of Providers** by clicking **Add**. Select a known **Provider** for this event by either searching using the **Magnifying Glass** icon or use the type-ahead functionality in the name field, then click **Apply**. Make sure you search for a provider using their **Last Name**. Repeat process until all providers are added.



**Add Event Providers** Apply Reset Print Close

\* Provider: PIEK, KRISTA LEIGH, Registered Nurse, CRNN i Q

Verification Status:  Requested  Not Requested

Workgroup:  User:

Apply Reset



**Tip: Verification Status**

The **Verification Status** relates to whether verification by another provider is requested or whether verification was completed for an immunization record. Before a Mass Immunization Event can have an Event Status of 'Complete', all immunizations requiring verification need to have been completed. This is an optional field and is defaulted to **Not Requested**.

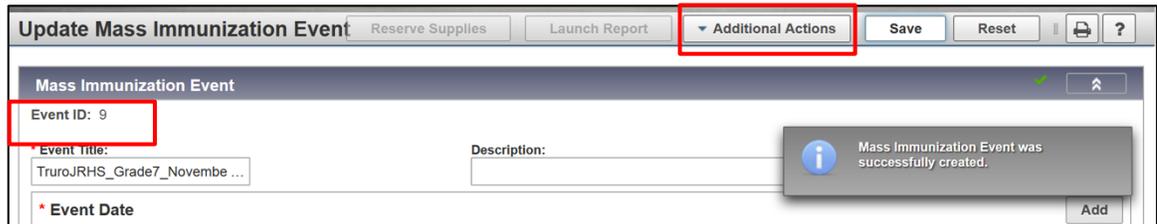


**Tip: Providers**

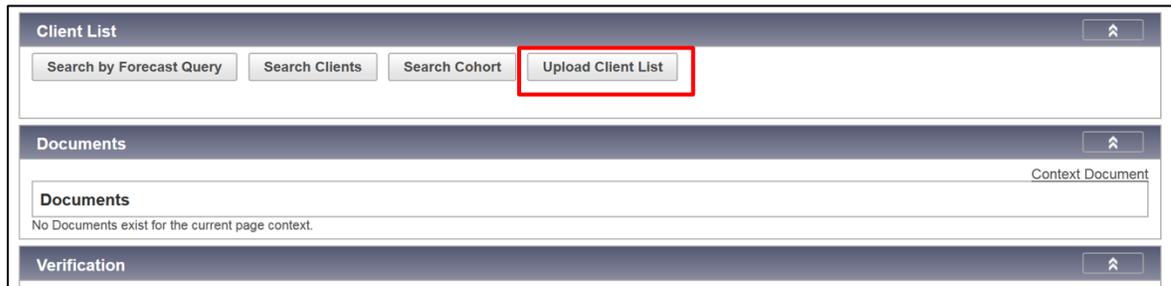
To save an event, you must make sure there are providers assigned to the event. The Clinic Lead should be assigned at a minimum.

8. Click **Save**. The message, *'Mass Immunization Event was saved successfully'* displays.
9. The screen is refreshed to an **Update Mass Immunization Event** screen with additional sections.

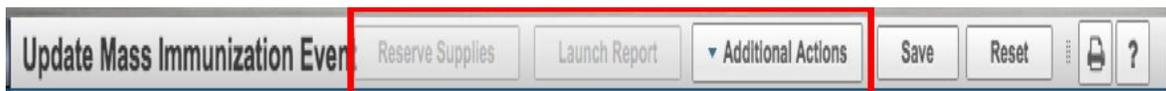
**Additional Actions** and an **Event ID** are generated.



Users can now upload the **Client List** and any event documents, as needed.



There are several tabs that become available to the user once a Client List is attached to the event. For any updates that do not require a Client List such as **Event Title**, **Event Date**, **Event Status**, **Event Type**, **Immunizing Agents** and **Event Providers**, users can make updates as necessary but need to click **Save** at the top of the screen for changes to take place.



**Launch Report**, **Generate Letters** (not in scope in NS), **Event Consent**, and **Worksheet** will become available once there is a Client List with at least one client.

## 2.4 Adding a Client List

There are several ways to add a **Client List** to a **Mass Immunization Event**. Clients can be added through the following methods, although only **Search Client** and **Client Upload Template** methods will be the focus of this core training since these two methods directly

align to the business needs in NS. Training on Forecast Queries (#1) and Cohorts (#3) will be available in optional supplementary training materials.

1. Searching for an existing **Forecast Query**
2. Search Clients (for individual clients)
3. Search Cohort (for an existing group)
4. **Upload Client List (using a Client Upload Template)**

For non-school immunizations, client lists (if known) may be generated using a Panorama **Client Upload Template**. The **Search Client** method may also be used at public health clinics for events where clients are not known in advance and who will be added one at a time to the overall mass event client list as they register or attend the immunization event.

Using the Client Upload Template allows the user to do the following with one single Upload:

1. Add clients that already exist in Panorama to the **Client List**.
2. Create new clients in Panorama that did not exist in Panorama previously, and add new clients to the **Client List**.

School mass immunization events will use a combination of approaches to manage client lists, with the education record (school, grade, and class) being the default. Private schools whose student lists are not in the Nova Scotia School Information System will be required to provide client lists for upload, whereas, client lists for public schools can be searched more directly in Panorama.

### 2.4.1 Search Clients

Two methods to search for clients of school mass immunization events. Users can search for groups of students or for individual students.

#### 2.4.1.1 Search Clients by School and Grade

1. Students may be searched as a group using their school and grade as key search parameters. Click the downward arrows at the end of the Advanced Search Criteria section. Next, click the downward arrows for School Information.



2. Complete the search criteria, including School, School Year, and Grade.

**Advanced Search Criteria**

**School Information**

School:

School Year:  Grade:  Class:

3. Click Search.
4. The search results display. Select the students and click Select and Return.

**Search Results**

<input type="checkbox"/>	<input type="checkbox"/>	Client ID	Health Card Number	Last Name	First Name	Gender	Date of Birth	Health Region	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	43	0935000000	Autumn	Andrew	Male	2005 Sep 27	Truro PHO	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	45	0325000000	Cloud	Rodney	Male	2005 Aug 05	Truro PHO	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	41	0040000000	Spring	May	Female	2005 Nov 15	Truro PHO	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	40	0020000000	Summer	Susan	Female	2005 Jan 06	Truro PHO	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	44	0830000000	Sunshine	Elissa	Female	2005 Jun 10	Panorama Cloud	Active
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	42	0091000000	Winter	Wanda	Female	2005 Feb 24	Truro PHO	Active

Total: 6

5. The Update Mass Immunization Event screen is displayed and the Client List section is populated with the Student List. Click Save to save the client list.

**Client List**

Cohort: TruroJRHS Grade7 November2017

Result Set: TruroJRHS Grade7 November2017

Client List Attached on: 2017 Nov 13

**Client List Content**

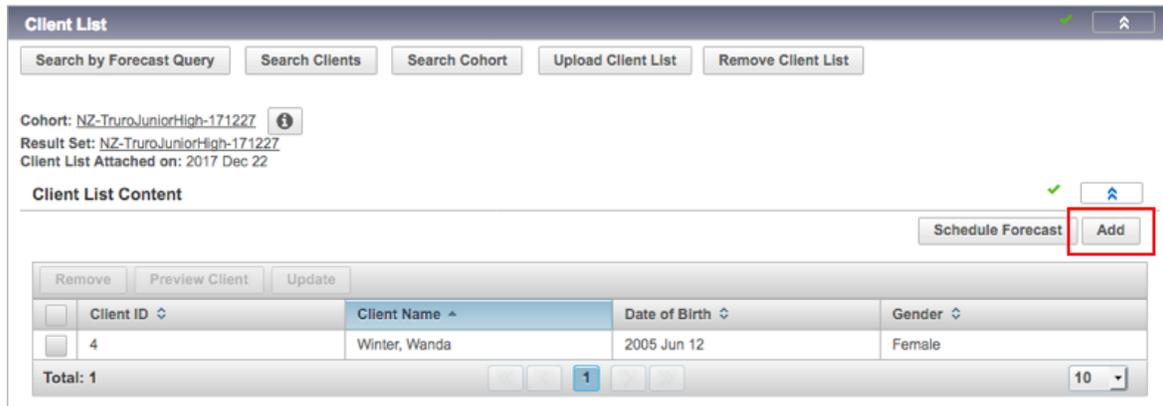
<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender
<input type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male
<input type="checkbox"/>	41	Spring, May	2005 Nov 15	Female
<input type="checkbox"/>	40	Summer, Susan	2005 Jan 06	Female
<input type="checkbox"/>	44	Sunshine, Elissa	2005 Jun 10	Female
<input type="checkbox"/>	42	Winter, Wanda	2005 Feb 24	Female

Total: 6

### 2.4.1.2 Search Individual Clients

Students can also be added to a mass immunization event one at a time by searching for individual clients. This method tends to be the most time consuming, especially if there is a long list of clients to be added to the event.

1. Once the Client List is created through the Advanced Search by School and Grade, users should not use the Search Client process again – as this will overwrite the initial list. Instead, users should click **Add** on the right-hand side of the screen.



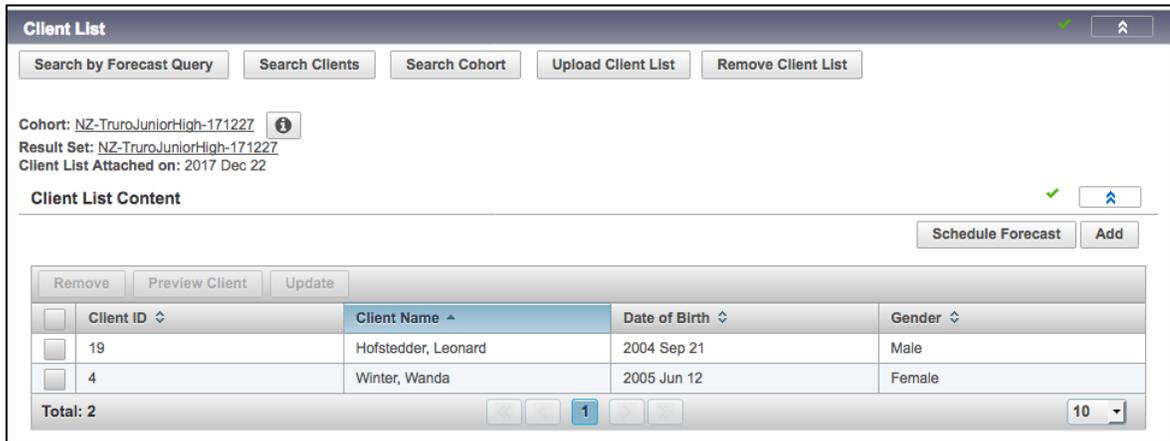
2. Search for the client using either the client's Health Card Number, Additional IDs, Last Name, and First Name. Click **Search**.
3. Once the client is found, click on the checkbox next to the client's name. Click **Select and Return**.



4. The Update Mass Immunization Event screen is displayed and a confirmation message is displayed.



5. The Client List section is populated with the Student List. Click Save to save the client list.



**Client List**

Search by Forecast Query   Search Clients   Search Cohort   Upload Client List   Remove Client List

Cohort: NZ-TruroJuniorHigh-171227 ⓘ  
 Result Set: NZ-TruroJuniorHigh-171227  
 Client List Attached on: 2017 Dec 22

Client List Content

Schedule Forecast   Add

Remove   Preview Client   Update

<input type="checkbox"/>	Client ID ↕	Client Name ^	Date of Birth ↕	Gender ↕
<input type="checkbox"/>	19	Hofstedder, Leonard	2004 Sep 21	Male
<input type="checkbox"/>	4	Winter, Wanda	2005 Jun 12	Female

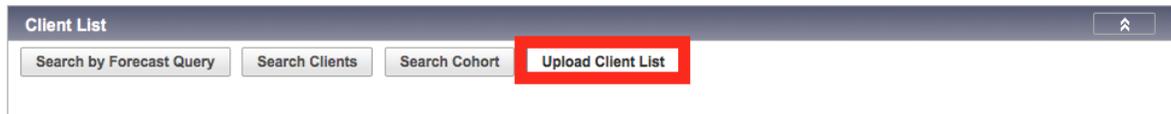
Total: 2   1   10

### 2.4.2 Upload Client List

The final way to add clients to a Mass Immunization event is through a **Client Upload Template**. This way is straightforward but requires the Users to format a Panorama Upload Template correctly in a **.txt** format. This is the designated method to add student lists from private schools.

Below are the steps to add a client list to the Mass Immunization Event

1. With a mass immunization event successfully created, select **Upload Client List** under **Client List**.



**Client List**

Search by Forecast Query   Search Clients   Search Cohort   Upload Client List

2. See **CLT 103 – Client Upload Template** for specific steps to complete upload.

## 2.5 Updating Mass Immunization Events

Updating the event details is possible at any point if the following criteria are met:

1. The **Event Status** is still **Open**.
2. None of the clients in the event have been immunized.

A User can update the following information after the event has been created:

1. Schedule Forecast
2. Update Clients
3. Add Clients
4. Delete Clients
5. Preview Clients

6. Cancel/Delete/Complete Event
7. Update Event Details

### 2.5.1 Schedule Forecast

Users can set a date for when the last update of Forecaster should occur before the event.

1. Click **Schedule Forecast**; a separate screen will display.



Client List Content

Schedule Forecast Add

Client ID	Client Name	Date of Birth	Gender
43	Autumn, Andrew	2005 Sep 27	Male
45	Cloud, Rodney	2005 Aug 05	Male
41	Spring, May	2005 Nov 15	Female
40	Summer, Susan	2005 Jan 06	Female
44	Sunshine, Elissa	2005 Jun 10	Female
42	Winter, Wanda	2005 Feb 24	Female

Total: 6

2. Enter **Forecast Schedule Date**, then click **Confirm**.



Schedule Forecast

The oldest forecast within this group of clients: 2017 Nov 11 19:15 AST

All the clients in this event were last forecasted as a group on:

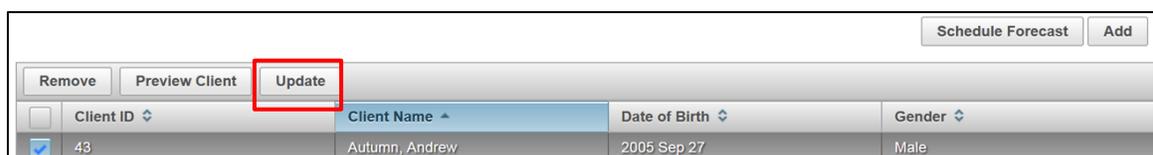
\* Forecast Schedule Date:

Confirm

### 2.5.2 Update Clients

A user can update a client's record.

1. Click on a radio button beside a **Client ID** and click **Update**.



Schedule Forecast Add

Remove Preview Client Update

Client ID	Client Name	Date of Birth	Gender
<input checked="" type="checkbox"/> 43	Autumn, Andrew	2005 Sep 27	Male

- The **Client Demographics** screen is displayed. Information can be updated. Click **Save** and then click **Return** to return to the Mass Immunization Event.



### 2.5.3 Add Clients

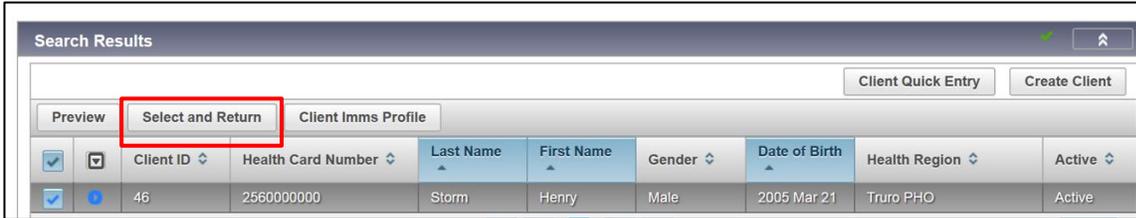
- To add a student to the **Client List**, click the **Add** button beside **Schedule Forecast**.



- This takes you to the **Search Clients** screen.



- Search for the Client and once found, click on the checkbox next to the Client's name and click **Select and Return**.



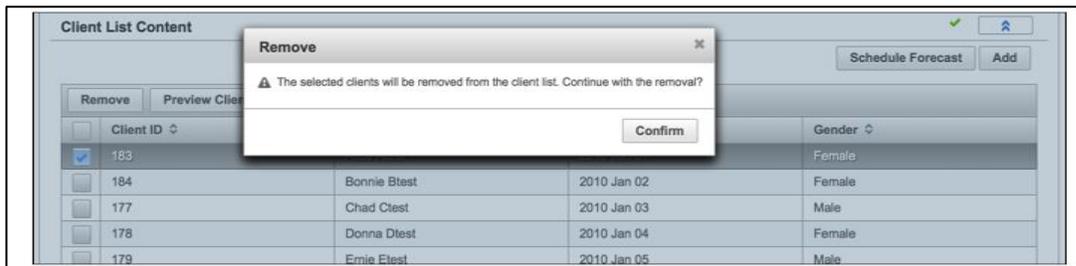
**Tip: Adding Clients**

**Add Clients** is helpful when they have been missed or are new to the list. Only clients already in Panorama can be added to the list. Clients cannot be created through this route.

### 2.5.4 Delete Client

A user can delete a client from the Client List.

1. Click the radio button beside the **Client ID** and click **Delete**. A warning will display asking the User if they want to perform this action. Click **Confirm**.



**Tip: Deleting Clients**

**Delete Clients** only when they should not be part of the event. Once the client's event status has changed, the client cannot be removed from the Client List.

### 2.5.5 Preview Client

A user can view a read-only screen of a client's profile.

1. Click the radio button beside **Client ID** then click **Preview Client**. To close, click **X** in the top right corner of **Client Profile**.

**Client Profile** ✕

---

**Client Information**

Client ID: 43  
 Client Name: Autumn, Andrew  
 Preferred Alternate Name:  
 Health Card Number: 0935000000 - Nova Scotia Health Card  
 Date of Birth: 2005 Sep 27  
 Age: 12 years 1 months  
 Gender: Male  
 Gender Identity:  
 Other Identity:  
 Preferred Address:  
 Preferred Telephone Number: Primary home: 902-666-0987  
 Health Region: Truro PHO

A User can open, cancel or complete an event by updating the **Event Status**. Click **Status**, then select a new Status from the dropdown menu. Click **Save**.

**\* Status:**

Open ▾

Cancelled

Completed

Open



**Tip: Changing Event Status**

**Only immunization events with an event status of Open may be updated.** An event can be **Cancelled** if the event status is 'Open' and no client list is attached to the event. An event can be **Completed** if the event status is **Open** and at least one immunization has been administered and all provider verifications have been completed. Users can also update any of the event details if none of the clients in the worksheet have been immunized. This includes adding and removing **Providers**, adding, removing and updating **Immunizing Agents**, and updating any of the **Event Details**. Simply do this by selecting the item to be updated and click **Update**.

For example, to update the Provider follow these steps:

1. Select the Provider to be updated and click **Update**. Complete the Provider updates.

**\* Event Providers** Add

Update Delete

	Provider	Verification Status	Workgroup	User
1	PIEK, KRISTA LEIGH	Not Requested		

Total: 1 10 ▾



**Tip: Saving Events**

After any updates, ensure to click *Save* on the *Update Mass Immunization* screen before navigating away from the screen.

## 2.6 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 **Additional Actions** at the top of the Update Mass Immunization Event screen then click **Worksheet**.



**Tip: Accessing the Worksheet**

You can only access the worksheet if clients have been attached to the mass immunization event.



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

**Event Worksheet** Launch Report Additional Actions log Print ?

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

---

**Event Worksheet** Info Up

Event Title: TruroJRHS\_Grade7\_November2017 Event ID: 9  
 Event Date: 2017 Nov 13, 2017 Nov 14 Location: Truro Junior High School  
 Event Type: School Immunization 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
<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	---
<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"/>	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"/>	46	Storm, Henry	2005 Mar 21	Male	Men-C-ACYW-...	Due	Granted	---

- To access the worksheet if not currently in Mass Immunizations Events, select **Mass Immunization Events** from the Left-Hand Navigation menu.
- Search for the Mass Immunization Event.
- Select the Mass Immunization Event under **Search Results**.
- Click **Worksheet**.

**Search Results** Info Up Create

Update View Delete **Worksheet**

Event ID	Event Title	Event Date	Additional Dates	Client List	Provided By	Status
30	Different Classes	2017 Dec 27		Y	HARRIS, Andrew Thomas	Open
27	NZ-PictouAcademy-HPV4-20171227	2017 Dec 26		Y	STEWART, Richard C. / ROBINSON, Vincent J.B.	Open

- The **Event Worksheet** will display.



**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**.

- 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 or View Consent
- Select Client(s) to Update Event Status
- Select Client to Preview Client
- Select Client to Update Client
- 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

<input type="checkbox"/> <span>Record Consent</span> <span>Record Immunization</span> <span>Client Event Status</span> <span>Client Event Summary</span> <span>Deferrals</span> <span>Preview Client</span>									
<input type="checkbox"/> <span>View Consent</span> <span>Update Client</span> <span>Generate Letters</span> <span>Assess and Immunize</span>									
<input type="checkbox"/>	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.

9. At the top of the **Mass Immunization Event Worksheet** screen under Additional Actions, a User can access additional functionality:
  - Update **Event Details** returns to Update Mass Immunization Event
  - Note that **Generate Letters** is not currently in scope for NS.

## 2.7 Recording Consent

Users can record consent for an individual client or multiple clients at a time. This is done by selecting the **Record Consent** tab.

1. To document consent for an individual student, go to the **Event Worksheet** and select the student(s) for whom you want to record consent. Select the **Record Consent** button. If Clerks are recording consent, it must be in Draft format only, and will be updated by the Nurse.



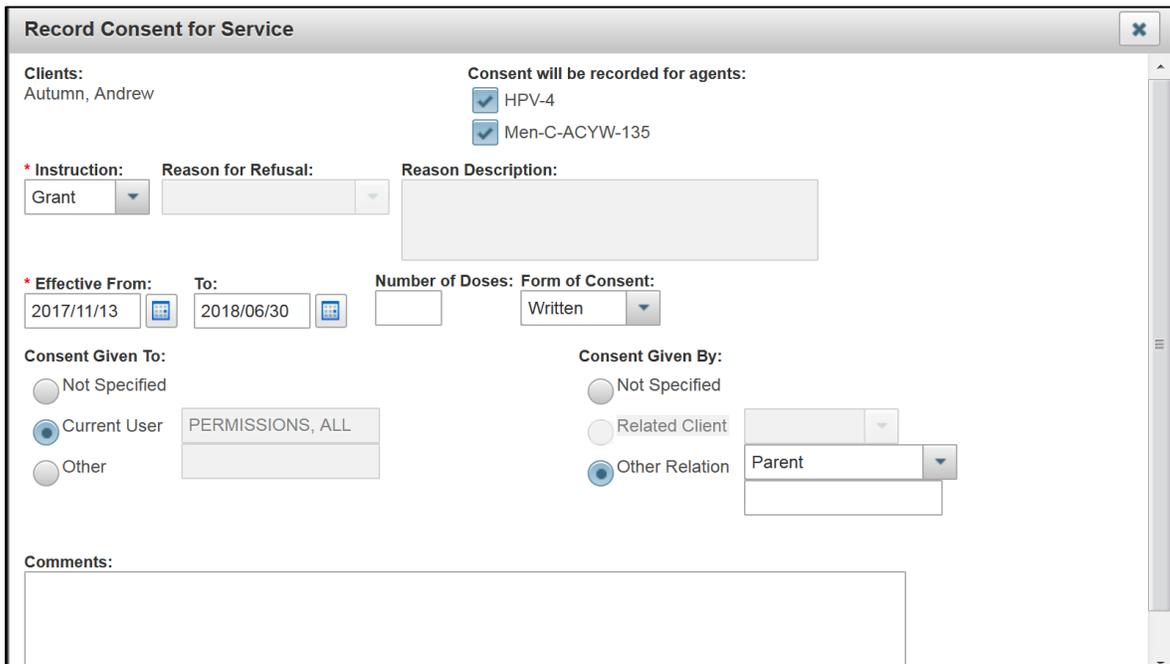
Displaying 7 out of 7 clients

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 checked="" type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	Men-C-ACYW-...	Due	Missing	---
<input checked="" type="checkbox"/>	43	Autumn, Andrew	2005 Sep 27	Male	HPV-4	Due	Missing	---

2. The **Record Consent for Service** screen is now displayed.



**Record Consent for Service**

Clients: Autumn, Andrew

Consent will be recorded for agents:
 

- HPV-4
- Men-C-ACYW-135

\* Instruction: Grant | Reason for Refusal: | Reason Description:

\* Effective From: 2017/11/13 | To: 2018/06/30 | Number of Doses: | Form of Consent: Written

Consent Given To:
 

- Not Specified
- Current User | PERMISSIONS, ALL
- Other

Consent Given By:
 

- Not Specified
- Related Client
- Other Relation | Parent

Comments:



3. Check/uncheck the desired Agents under **Consent will be Recorded for Agents** to which consent will be applied.
4. Complete the consent parameters as per NS and organizational policies.
  - In the **Consent Given By** section, select Parent or Guardian and do not add their name.
  - For **Consent Given To** section, select **Current User** (yourself).
  - In the **Comments** box, add any additional information as per NS or organizational policies.
  - The **Effective From** date should be the date you are entering the consent(s) in Panorama.
5. Click **Save**.



**Tip: Special Considerations**

**Special Considerations (Exemptions)** must be manually created on each individual client file by clicking on the check box next to the Client Name and then clicking **Assess and Immunize**, then **Actions**, and finally **Special Considerations**.

6. Once a Consent for Service is Granted, the **Consent Readiness** in the Worksheet changes from **Missing** to **Granted**.

<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	---



**Tip: Apply for All**

If all clients had provided a consent of Grant (or Refuse) then the User can simply check the checkbox at the top of the screen to select all clients at the same time. Select **Record Consent** and follow the same steps as above. This will record consent for all clients in the worksheet with fewer clicks.

## 2.8 Updating the Mass Immunizations Event Status

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. Note: once an event status is set it can not be set back to “-----” or changed through the Update Event Status button.

Event Worksheet									
<input type="button" value="Launch Report"/> <input type="button" value="Additional Actions"/> <input type="button" value="log"/> <input type="button" value="Print"/> <input type="button" value="Help"/>									
<input type="button" value="View Consent"/> <input type="button" value="Update Client"/> <input type="button" value="Generate Letters"/> <input type="button" value="Assess and Immunize"/>									
<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	---	
<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(s) 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
  - Immunization Deferred
  - Moved out of school
  - No parental consent
  - Previous immunization

**Event Worksheet** Launch Report ▼ Add

---

**Update Client Event Status** ✕

**Clients:**  
Autumn, Andrew  
Cloud, Rodney

**Client Event Status will be updated for:**

HPV-4  
 Men-C-ACYW-135

**\* Client Event Status:**

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

---

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

2. Click **Save**.

**Update Client Event Status** ✕

**Clients:**  
Autumn, Andrew  
Cloud, Rodney

**Client Event Status will be updated for:**

HPV-4  
 Men-C-ACYW-135

**\* Client Event Status:**

Client refusal

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

	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

## 2.9 Deferring a Client

Deferrals can also be documented into the event worksheet prior to or during the event individually or as a group.

1. To defer an immunization for a student or more than one student, the status must be changed to “deferred”. Click **Client Event Status**.

Displaying 8 out of 8 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	Consent Readiness	Event Status			
<input type="checkbox"/>				Filter	Filter	Filter	Filter	Filter			
<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. Under **Client Event Status**, select Immunization deferred. Click **Save**.

**Event Worksheet** Launch Report Addit...

---

**Update Client Event Status** ✕

Clients: Smith, Samuel

Client Event Status will be updated for:

HPV-4

Men-C-ACYW-135

\* Client Event Status:

Immunization deferred ▼

3. The status changes to Immunization deferred.

<input checked="" type="checkbox"/>	48	Smith, Samuel	2005 Nov 01	Male	Men-C-ACYW-...	Due	Missing	Immuniza... deferred
-------------------------------------	----	---------------	-------------	------	----------------	-----	---------	----------------------

4. To create a deferral, select one or more students with the same type of deferral related to the same agent then click **Deferral**.

Displaying 8 out of 8 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	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	---			

5. Check the applicable agents, 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:**   **To:**

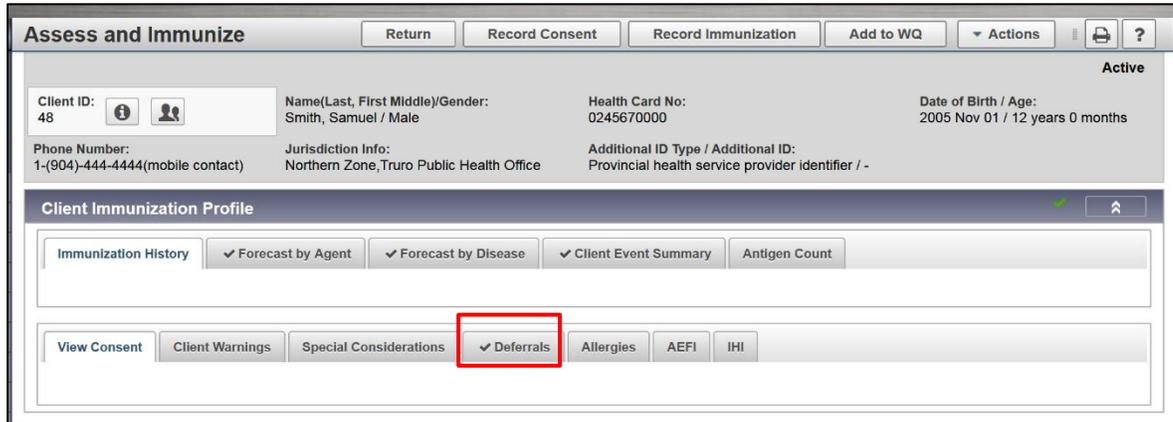
**\* Reason:**

**Comment Text:**

(2000 characters remaining.)

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

<input type="checkbox"/>	48	Smith, Samuel	2005 Nov 01	Male	Men-C-ACYW-...	Due	Missing	NA
--------------------------	----	---------------	-------------	------	----------------	-----	---------	----



**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

## 2.10 Recording Immunizations

Users can record an immunization for an individual student or a group of students with the same parameters at one time.

There are two ways to record immunization:

1. Select **Record Immunization** for one or multiple clients
2. Select **Assess and Immunize** for one client at a time



### **Tip: Recording Multiple Immunizations**

*Users have the option of applying multiple immunizations at once, or completing each agent application individually (e.g. Add immunizations for all students receiving Men-C-ACYW-135 vs adding Tap and Men-C-ACYW-135 at the same time).*

#### **2.10.1 Recording Immunizations for one or multiple clients at a time**

1. On the Worksheet, click the checkbox beside the students that will be having their immunization recorded. 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

<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
<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	---
<input checked="" type="checkbox"/>	46	Storm, Henry	2005 Mar 21	Male	Men-C-ACYW-...	Due	Granted	---
<input checked="" type="checkbox"/>	46	Storm, Henry	2005 Mar 21	Male	HPV-4	Due	Granted	---

- On the Record Immunization screen, select each immunizing agent in the list that appears, enter **Date Administered**, **Time**, **Site**, and **Provider** then click **Save**.

**Record Immunization**

Clients: Spring, May  
Storm, Henry

\* 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.

<input checked="" type="checkbox"/>	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 those students will now show up in their **Event Status** column as **Immunized**.

Event Worksheet											
Event Title: TruroJRH5_Grade7_November2017					Event ID: 9						
Event Date: 2017 Nov 13 , 2017 Nov 14					Location: Truro Junior High School						
Event Type: School Immunization					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		
<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 type="checkbox"/>		41	Spring, May	2005 Nov 15	Female	Men-C-ACYW-...	Due	Granted	Immunized		
<input type="checkbox"/>		41	Spring, May	2005 Nov 15	Female	HPV-4	Due	Granted	Immunized		
<input type="checkbox"/>		46	Storm, Henry	2005 Mar 21	Male	Men-C-ACYW-...	Due	Granted	Immunized		
<input type="checkbox"/>		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** or **Special Considerations**.



**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**. In the event the User was recording an immunization on behalf of another provider, then this should be recorded as a **Non-Provider Recorded Immunization**. The **Provider** dropdown list will then be activated and the User can select the appropriate **Provider**. See **IMMS 101 – Single Immunization** for details on Provider Recorded and Non-Provider Recorded Immunizations.

### 2.10.2 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 immunized 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	<b>Assess and Immunize</b>				
<input type="checkbox"/>	Client ID	Client Name	Date of Birth	Gender	Immunizing Agent	Forecast Status	Consent Readiness	Event Status
<input checked="" type="checkbox"/>	42	Winter, Wanda	2005 Feb 24	Female	Men-CACYW...	Due	Missing	---

2. The **Assess and Immunize** screen now displays with the individual student In Context.

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

**Client ID:** 42 **Name (Last, First Middle):** Winter, Wanda / **Gender:** 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** [Up Arrow]

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

[View Consent] [Client Warnings] [Special Considerations] [Deferrals] [Allergies] [AEFI] [IHI]



**Tip: Actions from Assess and Immunize**

If the selected student is absent, the User can easily update the student's **Event Status** to Absent. Click **Actions** at the top of the screen, then clicks **Client Event Status**.



3. If the student presents to the User with a signed paper consent at the event, the User can easily record the consent by clicking the **Record Consent** button at the top the screen.
4. The information is recorded the same way for individuals and groups from the Event Worksheet. When completed, click **Save**.
5. Once the User has established the student's presence, consent for services are documented, and no other assessment parameters prevent the student from receiving the event immunizations, the User can now proceed to provide the consented immunizations and then record the immunizations within **Assess and Immunize**.
6. **Record Immunization(s)** - With the student in context within the **Assess and Immunize** screen, click **Record Immunization** at the top of the screen. The immunizing agents that are covered by a consent are checked. Select the **Site** from the dropdown menu then select the Provider name (your name), if not defaulted, from the **Provider** dropdown. Click **Save**.

**Record Immunization**

Clients: Autumn, Andrew  
 \* Date Administered: 2017 Nov 13  
 Time Administered:  
 Leave blank  
 Enter time: hh:mm  
 Use current time

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

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

- Returning to the Event Worksheet, the User can see the student's event status has been updated to **'Immunized'**.

**Event Worksheet**

<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	---
<input type="checkbox"/>	45	Cloud, Rodney	2005 Aug 05	Male	HPV-4	Due	Granted	Client refusal
<input type="checkbox"/>	41	Spring, May	2005 Nov 15	Female	Men-C-ACYW-...	Due	Granted	Immunized
<input type="checkbox"/>	41	Spring, May	2005 Nov 15	Female	HPV-4	Due	Granted	Immunized
<input type="checkbox"/>	46	Storm, Henry	2005 Mar 21	Male	Men-C-ACYW-...	Due	Granted	Immunized
<input type="checkbox"/>	46	Storm, Henry	2005 Mar 21	Male	HPV-4	Due	Granted	Immunized
<input type="checkbox"/>	40	Summer, Susan	2005 Jan 06	Female	Men-C-ACYW-...	Due	Granted	---
<input type="checkbox"/>	40	Summer, Susan	2005 Jan 06	Female	HPV-4	Due	Granted	---
<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	Granted	Immunized
<input type="checkbox"/>	42	Winter, Wanda	2005 Feb 24	Female	HPV-4	Due	Granted	Immunized

- The User now moves onto the next student repeating the above **Assess and Immunize** process.

## 2.11 Managing Vaccine Wastage

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.

## 2.12 Client Pick Ups

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A custom report will be available to identify students who missed at least one dose of a school vaccine after a round of school immunizations. The **Pick-Up List** report will list students with overdue vaccines, as well as the specific vaccines they missed. It will support the planning and delivery of missed doses.

The Mass Immunization Event functionality also supports client pick-ups through the ability to add an event date to a Mass Immunizations Event, rather than create a separate Mass Immunization Event for pick-ups. This allows the students requiring pick-up doses to be included in the original Mass Immunization Event for reporting purposes.

## 2.13 Mass Immunization Event Report

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A custom report called the **Mass Immunization Event Report** may be generated. This report provides a summary of immunizations planned versus administered, and includes a count by client event status for a specific Mass Immunizations Event. See **PNS IMM 104**.

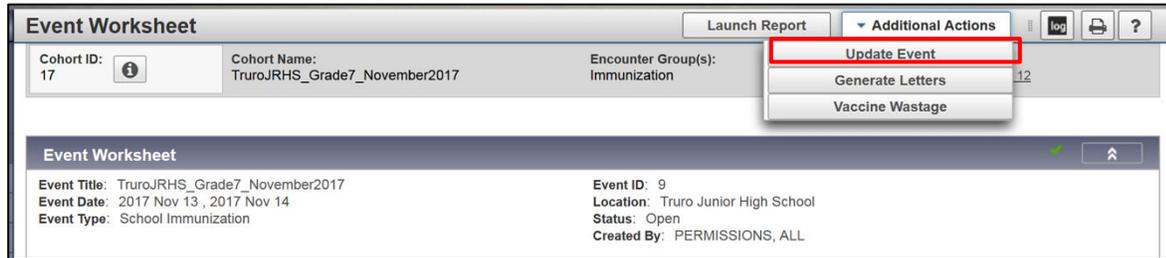
## 2.14 Closing the Event

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Once it has been determined the Mass Immunization Event is complete, the User can update the **Event's Status** to **Complete**.

Events can be closed when all students are immunized and their immunization status is changed to Immunized. Occasionally, there may be situations where not all students will be immunized as scheduled (due to absence or deferrals). In this case, the school clinic should be left open until all students are immunized through pick-ups or until the next round of school clinics are scheduled.

1. After ensuring all clients' **Event Statuses** have been updated, click on **Additional Actions** at the top of the page to access the **Update Mass Immunization Event** screen.



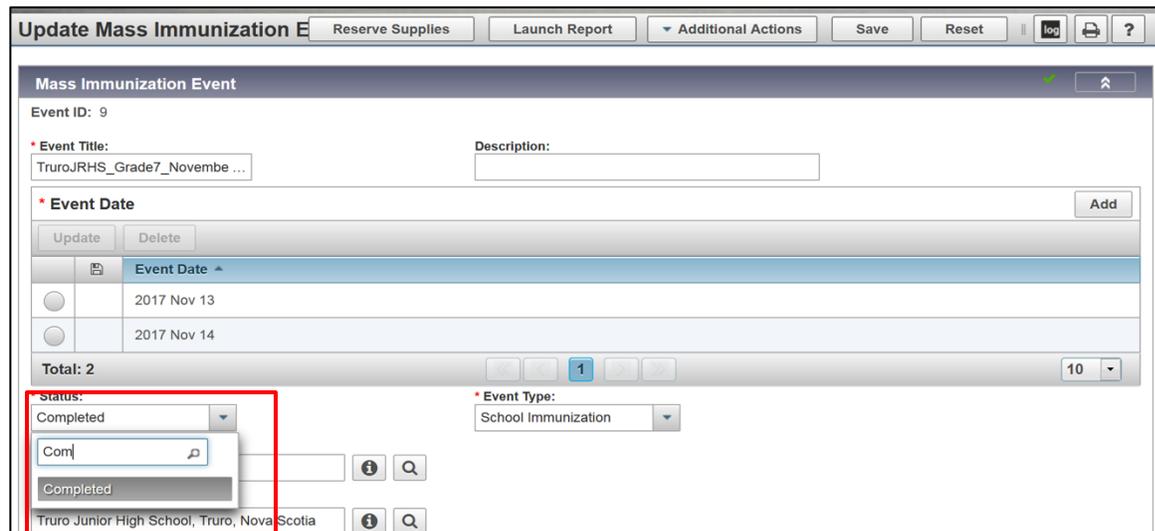
**Event Worksheet**

Cohort ID: 17    Cohort Name: TruroJRHS\_Grade7\_November2017    Encounter Group(s): Immunization

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

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

- From the **Update Mass Immunization Event** screen, select **Completed** from the **Status** dropdown menu. Click **Save**.



**Update Mass Immunization Event**

Event ID: 9

Event Title: TruroJRHS\_Grade7\_Novembe ...    Description:

Event Date

Event Date
2017 Nov 13
2017 Nov 14

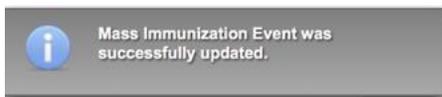
Total: 2

Status: Completed (highlighted in red box)

Event Type: School Immunization

Truro Junior High School, Truro, Nova Scotia

- Panorama will display a message, “Mass Immunization Event has been successfully Updated”. All fields in this event can no longer be changed once the status is updated. Note that they are now greyed out.



**Mass Immunization Event**

Event ID: 9

**Event Title:** TruroJRHS\_Grade7\_Novembe ... **Description:**

**\* Event Date** Add

Update Delete

	Event Date
<input type="radio"/>	2017 Nov 13
<input type="radio"/>	2017 Nov 14

Total: 2 10

**\* Status:** Completed **\* Event Type:** School Immunization

**\* Organization:** Truro PHO i Q

**\* Service Delivery Location:** Truro Junior High School, Truro, Nova Scotia i Q