

Mass Immunization

USER GUIDE

- ✓ **School Planning in Panorama**
- ✓ **Creating a Mass Immunization Event**
- ✓ **Working with the Event Worksheet**
- ✓ **Preparing for Event Delivery**
- ✓ **Managing Event Delivery**
- ✓ **Event Follow-up and Closure**

August 2026

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Introduction

Panorama Mass Immunization functionality allows an authorized user to create and manage a planned mass immunization service. The mass immunization functionality and screens have been implemented to support targeted grades as per the Provincial School Immunization Policy (PSIP).

It's important to follow the details found in the **PSIP TIMELINE** headers throughout this guide. Different event timelines may result in inaccurate or missing Panorama class lists, which will result in additional and duplicate work for the lead school nurse.

Ministry of Education Data

The Ministry of Health and the Ministry of Education (MoE) signed a Master Data Sharing Agreement with the associated Data Sharing Schedule PSIP-1A, which obliges all schools to share their Grades 1, 6, and 8 student information data (including phone numbers, address, etc.) to a public health nurse for the administration of the PSIP in a school.

School Data Upload Process

The eHealth Saskatchewan Panorama Support Team is responsible for uploading the MoE school registration extracts into Panorama, to be completed by the end of September. These uploads create an occupation record of "Student" for each client in Panorama matching a corresponding record in the MoE extract. The client's occupation is used to generate planning cohorts and mass immunization event client lists, discussed later in this document.

School Planning

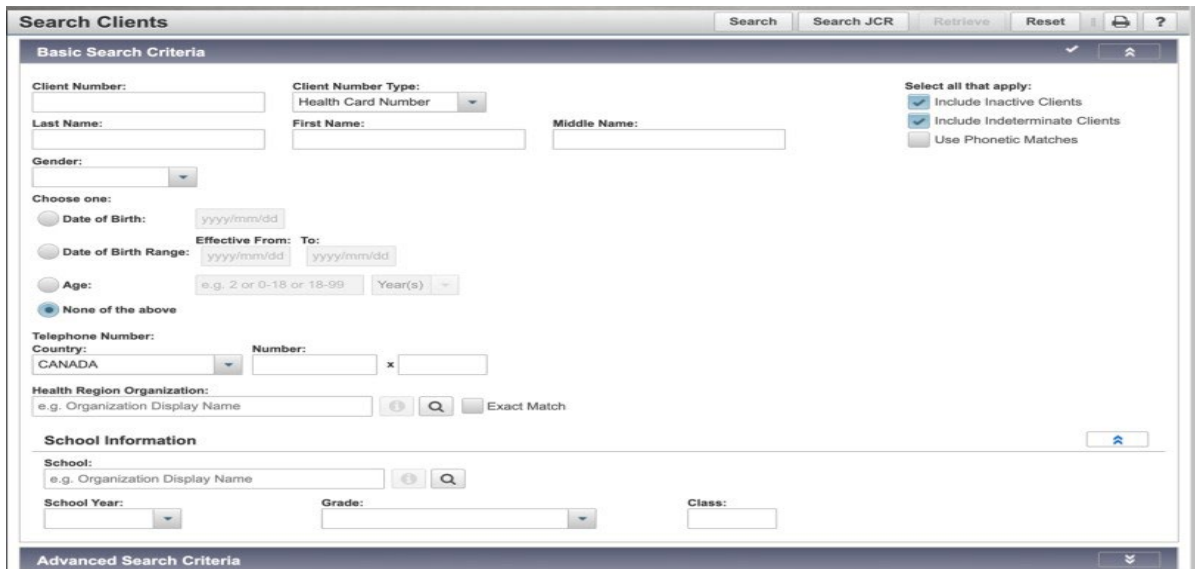
PSIP TIMELINE:

School Planning in Panorama involves generating the class list to support your work with the PSIP. Once the class list is available in Panorama, it can be used for several different purposes, including:

- ✓ Using the total client count of the class list to identify the required number of grade-specific consent forms for each class.
- ✓ Reviewing the Panorama Client records from the class list to prepare a general immunization consent form for those who are immunization delayed.

Viewing A Class List

1. From the **Left-Hand Navigation**, select **Search Clients**. The Search Clients screen will appear.



Search Clients [Search] [Search JCR] [Retrieve] [Reset] [Print] [Help]

Basic Search Criteria

Client Number: [Text Box] Client Number Type: [Health Card Number] [Dropdown]

Last Name: [Text Box] First Name: [Text Box] Middle Name: [Text Box]

Gender: [Dropdown]

Choose one:

- ☐ Date of Birth: [Text Box]
- ☐ Date of Birth Range: [Text Box] Effective From: [Text Box] To: [Text Box]
- ☐ Age: [Text Box] Year(s): [Text Box]
- ☒ None of the above

Telephone Number: Country: [CANADA] [Dropdown] Number: [Text Box] x [Text Box]

Health Region Organization: [Text Box] [Exact Match] [Search]

School Information

School: [Text Box] [Search]

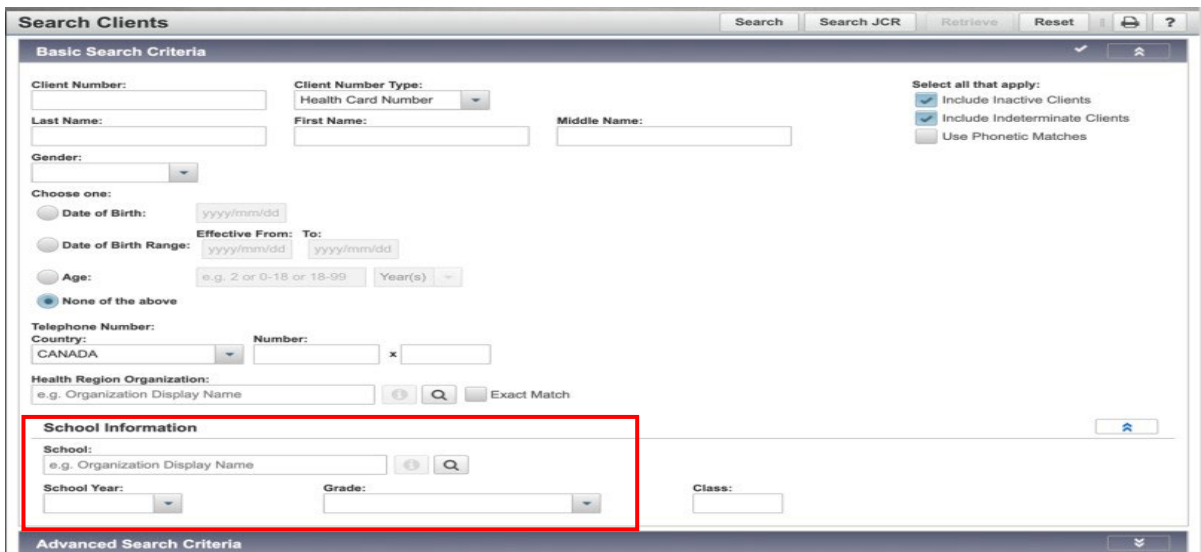
School Year: [Dropdown] Grade: [Dropdown] Class: [Text Box]

Advanced Search Criteria

Select all that apply:

- ☒ Include Inactive Clients
- ☒ Include Indeterminate Clients
- ☐ Use Phonetic Matches

2. Ensure the **Health Region Organization** field (found in the Basic Search Criteria section) is blank, as students may be listed in your school from other former Regional Health Authorities (RHAs).
3. Ensure that the client number type is left blank (presently it is prepopulated with Health Card).
4. Scroll down to School Information section.



Search Clients [Search] [Search JCR] [Retrieve] [Reset] [Print] [Help]

Basic Search Criteria

Client Number: [Text Box] Client Number Type: [Health Card Number] [Dropdown]

Last Name: [Text Box] First Name: [Text Box] Middle Name: [Text Box]

Gender: [Dropdown]

Choose one:

- ☐ Date of Birth: [Text Box]
- ☐ Date of Birth Range: [Text Box] Effective From: [Text Box] To: [Text Box]
- ☐ Age: [Text Box] Year(s): [Text Box]
- ☒ None of the above

Telephone Number: Country: [CANADA] [Dropdown] Number: [Text Box] x [Text Box]

Health Region Organization: [Text Box] [Exact Match] [Search]

School Information

School: [Text Box] [Search]

School Year: [Dropdown] Grade: [Dropdown] Class: [Text Box]

Advanced Search Criteria

Select all that apply:

- ☒ Include Inactive Clients
- ☒ Include Indeterminate Clients
- ☐ Use Phonetic Matches

5. Complete the relevant fields to generate the planning cohort. The School, School Year and Grade fields are required. The list of the students in a Grade cohort will not be divided into the different classrooms in Panorama.

School Class Lists

1. Type the name of the school into the School field. When the school name appears, select the school from the drop list (e.g., St. Catherine School, Regina).
2. Select the desired school year from the **School Year** field (e.g., 20XY- XZ).
3. Select the appropriate Grade from the **Grade** field. (e.g., Grade 6)
4. Scroll to bottom of list. Hit ALL to expand the class list beyond 20 students.
5. Click Search.

☐	☐	82223		Doe	Jacky	Female	2012 Feb 18	Regina Qu'Appelle RHA	Active
☐	☐	82220		Doe	Jane	Female	2012 Jul 03	Regina Qu'Appelle RHA	Active
☐	☐	82224		Doe	Jason	Male	2012 Mar 21	Regina Qu'Appelle RHA	Active
☐	☐	82222		Doe	Joe	Male	2012 Apr 08	Regina Qu'Appelle RHA	Active
☐	☐	82221		Doe	John	Male	2012 Mar 03	Regina Qu'Appelle RHA	Active
☐	☐	82225		Doe	Julie	Female	2012 May 14	Regina Qu'Appelle RHA	Active
Total: 118		1 2 3 4 5 6 20 ALL							

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Build: 3.0.1.1.20160621-1755

Students Not Registered with a School

1. Ensure the former regional health authority or First Nations Jurisdictions is selected from the Health Region Organization field (found in the Basic Search Criteria section).
2. Begin to enter the name of the school division into the School field. When the school division appears, select the desired option.
3. Select the desired school year from the School Year field.
4. Select the appropriate Grade from the Grade field.
5. Click the **Search** button from the top of the screen.
6. The screen will refresh, and the Search Results section will display. Clients displayed in the Search Results are Panorama Clients that match clients registered with the MoE for the desired school year.

Working with the Class List

Using the Search Results as the Class Count

1. From the Search Results section, note the number of results found. The total number of results represents the estimated size of the class list. Use this count as a substitute for the traditional class count obtained directly from the school, which can then be used to determine the number of blank grade-based consent forms required for the current grade.

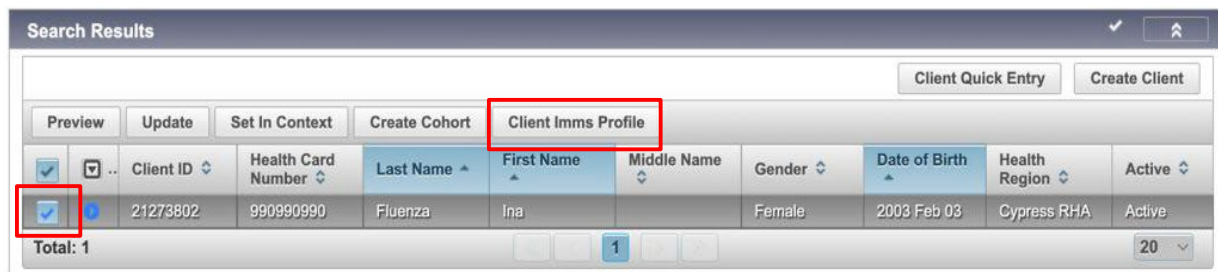


The screenshot shows the 'Search Results' window. At the top, there are buttons for 'Client Quick Entry' and 'Create Client'. Below these are tabs for 'Preview', 'Update', 'Set In Context', 'Create Cohort', and 'Client Imms Profile'. The 'Preview' tab is selected, displaying a table with the following columns: Client ID, Health Card Number, Last Name, First Name, Middle Name, Gender, Date of Birth, Health Region, and Active. A single record is shown with Client ID 21273802, Health Card Number 990990990, Last Name Fluenza, First Name Ina, Middle Name, Gender Female, Date of Birth 2003 Feb 03, Health Region Cypress RHA, and Active status. At the bottom left, 'Total: 1' is circled in red. At the bottom right, there is a pagination control showing '1' of 20 results.

TIP: Consider sending extra grade-based consent forms to your school in addition to the number listed in the Number of Clients field.

Using the Client Imms Profile Button to Review the Client's Record

1. From the Search Results section, select the desired Client record and click the **Client Imms Profile** button. The Client will be placed into context and the Update Client Immunization Profile screen will appear.



This screenshot is similar to the previous one, but with additional highlights. The 'Client Imms Profile' button is highlighted with a red rectangle. In the table, the first record is selected, indicated by a blue checkmark in the first column, which is also highlighted with a red rectangle. The 'Total: 1' and pagination controls remain the same.

2. From the Client Immunization Profile section, eligibility for any additional vaccines outside of the current grade-based schedule (resulting in a General Consent Form) will be displayed.
3. After reviewing the record, you need to re-enter your search criteria to obtain the class list again. **You can also click on retrieve, at the top menu bar and it will re-populate the school info.**

Creating a Mass Immunization Event

The Mass Immunization Event defines the date, location, providers, immunizing agents and clients that form the school immunization service. One Mass Immunization Event for each school and each Grade 1, 6 and 8 classes will be created. If there are multiple classes for your school and grade, the Mass Immunization Event will include all students in the Grade.

NOTE: A Mass Immunization Event should be created for each discrete school immunization service per year. For example, Grade 8, Grade 6 round 1, and Grade 6 round 2. If going back to catch up first round Grade 6 students, **do not create a new worksheet**. At this time, the previous Mass Immunization Event at the same school cannot be reused for catchups.

Once the Mass Immunization Event is created, it will automatically create and populate the Event Worksheet, which will be used to manage school immunization delivery and follow-up by all staff involved.

Creating the Mass Immunization Event in Panorama involves:

1. Creating a Base Mass Immunization Event.
2. Assigning a Class cohort (referred from this point on as the class list, or client list).
3. The Mass Immunization Event will remain in a status of “Open” once created, until the status has been manually changed to “Cancelled” or “Completed” (later in this User Guide).

Creating the Base Mass Immunization Event

1. From the **Left-Hand Navigation**, select **Immunizations > Mass Immunization Events**. The Search Mass Imms Event screen will appear.

Search Mass Imms Event

Search

Retrieve

Reset

Search Mass Imms Event

Event ID:

Event Title:

Status:

Open

Created By:

Event Type:

Event Date Range:

From:

yyyy/mm/dd

To:

yyyy/mm/dd

Organization:

Regina Qu'Appelle RHA, Regina, Saskatchewan

Exact Match

Service Delivery Location:

e.g. SDL Display Name

Search Results

Create

2. Click the **Create** button in the Search Mass Imms Event section. The Create Mass Imms Event screen will appear.

3. Complete the required fields in the Mass Immunization Event section.
 - a. Enter a title for the event in the **Event Title** field **following the format: [former RHA Acronym] [School Name] [Grade]**. For example, "SktnHR Lawson Heights School Grade 6".
 - b. Optionally enter a description of the event in the **Description** field (e.g., round 1).
 - c. Click the **calendar** button next to the **Event Date** field to add an event date.
 - d. Once a date is chosen, close calendar by clicking outside the calendar and the chosen date will populate in the box.
4. Repeat step C above to add multiple event dates, if necessary.
5. Select the appropriate grade from the **Event Type** field.
6. Ensure the **Organization** field is set to your current former HRO (e.g., Saskatoon Health Authority).
 - a. Type the school name into the **Service Delivery Location** field (e.g., Regina-St. Matthew School). If the school is not available from the list, contact your local Immunizations Key User.
7. Use Auto decrement box - click the box to auto decrement and ensure the holding point and the location are set for the office that vaccines are coming from.
8. Click the **Add** button next to the Immunizing Agents header to add an immunizing agent(s) that will be administered during the Mass Immunization event.

9. Complete the required fields in the Add Immunizing Agents section.
 - a. Select the appropriate agent from the **Immunizing Agent** field.
 - b. Select the appropriate lot number from the **Lot Number** field. If the lot number is not known, leave this field blank.

- c. From the **Route** field, select the appropriate route.
- d. From the **Reason for Immunization** field, select the appropriate reason. If the **Reason for Immunization** field is populated prior to entering a **Lot Number**, the original Reason for Immunization value may be removed. If this happens, simply re- add the original Reason for Immunization prior to saving the record.
- e. Click the **Apply** button to add the agent to the event. The agent will be added to the factory table.

- f. Repeat step 9 above to add additional agents to the event.

* Immunizing Agents						Add
Update Delete						
		Immunizing Agents ▲	Lot Number ⇅	Route ⇅	Reason for Immunization ⇅	
☐	☐	HB	AHBVC310AG	Intramuscular	Routine	
☐	☐	HPV-9	446Lot	Intramuscular	Routine	
☐	☐	Men-C-ACYW-135	M12106	Intramuscular	Routine	

10. Click the **Add** button next to the Event Providers header to add a provider to the Mass Immunization Event. At a minimum, one provider must be assigned to the event.
11. All providers offering immunization for that event must be added to this section by the event date for them to be able to document in the Mass Imms Events.

NOTE: It should be noted in the manual that any Public Health Nurse (PHN) who opens/updates an Event, must also be listed as a Provider (even if that PHN will not be a Provider on the date of immunization). If a PHN makes an update or creates an event and is not listed as a Provider, then the “record immunization” button becomes inactive, and no one can record.

- a. Add a provider by entering the last name of the provider into the **Provider** field. When the correct provider appears in the drop list, select the provider.
- b. Click the **Apply** button to add the provider to the event.

Event Providers						Add
Update Delete						
	Provider ID ⇅	Provider ▲	Verification Status ⇅	Workgroup ⇅	User ⇅	
☐	556	Schembri, Kyle	Not Requested			
Total: 1						10

- c. Repeat Steps to add additional providers to the event.
12. Click the **Save** button from the top of the Create Mass Immunization Event screen.
The system will display a message that the Mass Immunization Event has been successfully created, and the Update Mass Immunization Event screen will appear.

Mass Immunization Event

Event ID: 1184

Event Title:

Description:

Event Date:

2022/06/24

2022/06/27

2022/06/28



Status:

Open

Event Type:

School Grade 6

Organization:




Service Delivery Location:

Assigning the Class List to the Mass Immunization Event

The Client List section, found at the bottom of the Update Mass Immunization Event screen, allows users to manage the class list assigned to the Mass Immunization Event. After creating a base Mass Immunization Event, the Client List section will be empty. Click the **Search Clients** button from the Client List section. The Search Clients screen will appear.

Client List

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

Cohort: **RQHR St Andrew School Grade 6** **Schedule Forecast**

Client List: **RQHR St Andrew School Grade 6**

Attached on:

The oldest forecast within this group of clients: 2021 Jan 1 00:00 CST

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

Next Scheduled Forecasts for Client List:

Client List Content

Client List: **RQHR St...** Client: Search Type: **Add**

Remove **Preview Client** **Update**

TIP: Do not select the **Search Clients** button from the **Left-Hand Navigation**, as the left-hand navigation will not maintain the event context.

Search Clients

Search Search JCR Retrieve Reset

Basic Search Criteria

Client Number: Client Number Type: **Health Card Number**

Last Name: First Name: Middle Name:

Gender:

Choose one:

☐ Date of Birth:

☐ Date of Birth Range: Effective From: To:

☐ Age: Year(s):

☒ None of the above

Telephone Number: Country: **CANADA** Number:

Health Region Organization: ☐ Exact Match

School Information

School:

School Year: Grade: Class:

Advanced Search Criteria

Scroll to the School Information section. Complete the relevant fields to generate the class list. The School, School Year and Grade fields are required.

1. Type the name of your school into the School field. When the school name appears, select the desired option.
2. Select the desired school year from the School Year field. For example, 2025/2026
3. Select the appropriate Grade from the Grade field. For example, "Grade 6".
4. Ensure the former Health Region Organization field (found in the Basic Search Criteria section) is blank, as students may be listed in this school from other former RHAs.
5. Ensure that the client number type is left blank (presently it is prepopulated with Health Card).
6. Click the **Search** button from the top of the screen.

TIP: You can add students at any time by following the steps under the Adding or Removing Clients from the Mass Immunization Client List section.

School Class List

The screen will refresh and the Search Results section will display. Clients displayed in the Search Results are Panorama Clients that match clients registered with the MoE for the desired school year.

Search Clients

Search

Search JCR

Retrieve

Reset

Cancel

Client Quick Entry

Create Client

Preview

Select and Return

Client Imms Profile

☐	☒	Client ID	Health Card Number	Last Name	First Name	Middle Name	Gender	Date of Birth	Health Region	Active
☐	☒	54470			Spring		Female	2010 Aug 04	Regina Qu'Appelle RHA	Active
☐	☒	64526			Shalynne		Female	2010 Dec 18	Regina Qu'Appelle RHA	Active
☐	☒	31838			Abdul-Same		Female	2011 May 04	Regina Qu'Appelle RHA	Active
☐	☒	24312			Dorian		Female	2011 Feb 15	Regina Qu'Appelle RHA	Active
☐	☒	8645			Dorian		Female	2011 Feb 18	Regina Qu'Appelle RHA	Active

1. Expand the page at the bottom of screen to ensure you are seeing the whole class list, otherwise only 20 clients will be displayed and uploaded into the Mass Imms Event. Using the Search Results section, select which Clients will be included in the Mass Immunization Event Client List. More than one can be selected at a time will upload.
2. Click the **Select and Return** button. The Update Mass Immunization Event screen will appear. The Client List, found near the bottom of the screen, will now display the class list.

Search Clients

Search

Search JCR

Retrieve

Reset

Cancel

?

Basic Search Criteria

Advanced Search Criteria

Search Results

Client Quick Entry

Create Client

Preview

Select and Return

Client Imms Profile

☐	☐	Client ID	Health Card Number	Last Name	First Name	Middle Name	Gender	Date of Birth	Health Region	Active
☐	☐	54470			Spring		Female	2010 Aug 04	Regina Qu'Appelle RHA	Active
☒	☐	64526			Shalynne		Female	2010 Dec 18	Regina Qu'Appelle RHA	Active
☐	☐	31838			Abdul-Same		Female	2011 May 04	Regina Qu'Appelle RHA	Active
☒	☐	24312			Dorian		Female	2011 Feb 15	Regina Qu'Appelle RHA	Active
☐	☐	8645			Dorian		Female	2011 Feb 18	Regina Qu'Appelle RHA	Active
☐	☐	58580			Sugi		Female	2010 Sep 24	Regina Qu'Appelle RHA	Active
☐	☐	54203			Odelina		Female	2010 Jul 28	Regina Qu'Appelle RHA	Active
☐	☐	53002			Rosaria		Female	2011 Jan 18	Regina Qu'Appelle RHA	Active
☐	☐	47252			Pearlie		Female	2011 Feb 20	Regina Qu'Appelle RHA	Active
☐	☐	63748			Alvarado		Female	2010 Aug 03	Regina Qu'Appelle RHA	Active

Total: 10

1

ALL

- Click the **Save** button at the top of the screen to save the Mass Immunization Event. The system will display a message confirming that the Mass Immunization Event was successfully updated.

Client List

Search by Forecast Query

Search Clients

Search Cohort

Search Client List

Upload Client List

Remove Client List

Cohort: [RQHR St Andrew School Grade 6](#)

Schedule Forecast

Client List: [RQHR St Andrew School Grade 6](#)
Attached on: 2023 Jul 28
The oldest forecast within this group of clients: 2020 Jul 28 00:00 CST
All the clients in this event were last forecasted as a group on:
Next Scheduled Forecasts for Client List:

Client List Content

Client List:

Client:

Search Type:

RQHR St ...

Client Last Name or ID

Q

Add

Remove

Preview Client

Update

Client ID	Client Name	Date of Birth	Gender
54470	. Spring	2010 Aug 04	Female
64526	. Shalynne	2010 Dec 18	Female
31838	. Abdul-Same	2011 May 04	Female
8645	. Dorian	2011 Feb 18	Female
24312	. Dorian	2011 Feb 15	Female
58580	. Sugi	2010 Sep 24	Female
54203	. Odelina	2010 Jul 28	Female
53002	. Rosaria	2011 Jan 18	Female
47252	. Pearlle	2011 Feb 20	Female
63748	. Alvarado	2010 Aug 03	Female

Total: 10

1

10

Accessing the Mass Immunization Event

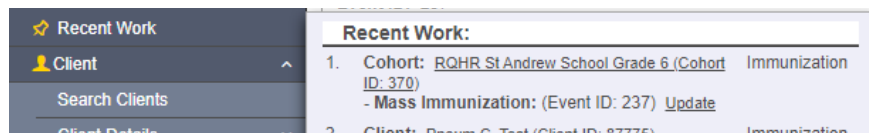
Once the Mass Immunization Event has been created, it's important to understand how best to access the event record if you navigate away in Panorama in two ways:

- A. Use the Recent Work tab.
- B. Use Mass Immunization Event from the left-hand navigation.

Recent Work Tab

The Recent Work tab is available from every screen in Panorama, which provides a quick way to access the Mass Immunization Event regardless of the current screen. The Mass Immunization Event will only appear in the Recent Work tab if it is within the last 10 clients noted.

1. From the **Left-Hand Navigation**, select **Recent Work** from the top.
2. From the top left, click the **Recent Work** tab. The Recent Work popup will appear.



3. From the Recent Work popup, click the **Update** hyperlink to go to the Update Mass Imms Event Screen.

Mass Immunization Event Search

If the Mass Immunization Event is not listed in the Recent Work popup, the Search Mass Imms Event screen will allow you to manually search for the event record.

1. From the **Left-Hand Navigation**, select **Immunization > Mass Immunization Events**. The Search Mass Immunization Event screen will appear. *You will get an error message stating "Too many search results found. Please refine the search criteria and try again."*



2. To search for the desired Mass Immunization Event, there are multiple search options:
 - a. Enter the event title into the **Event Title** field. The wildcard character % is accepted in this field both before and after your search text. The wildcard is recommended by the Panorama Support Team to provide easier searching.
 - i. For example, enter "%Lawson Heights%" if you are searching for an event with the title "SktnHR Lawson Heights Gr 6".
 - b. Select an appropriate type or status from the **Event Type** or **Status** fields.
 - c. Enter a date range matching the event date into the **Event Date Range** fields.
 - d. Select the event's Organization or Service Delivery Location from the **Organization** or **Location** fields.

- e. Select the creator of the event from the created by field.
Click the **Search** button at the top of the screen. The screen will refresh, and results will be displayed below.
3. If the desired Mass Immunization Event is available from the table, select the event and click the appropriate action button.

Search Mass Immunization Event Search Retrieve Reset ?

Search Mass Immunization Event

Event ID:

Event Title:

Status:

Created By:

Event Type:

Event Date Range:
From: 2017/02/27 To: 2017/03/01

Organization: ?

Service Delivery Location: ?

Search Results Create

Update View Delete Worksheet

	Event ID	Event Title	Event Date	Additional Dates	Client List	Provided By	Status
	1102	SktNHR Lawson Heights Gr 6	2017 Feb 28		Y	Schembri, Kyle	Open

Total: 1 1 50

- a. Click the **Update** button to access the Update Mass Immunization Event screen and make changes.
- b. Click the **View** button to view the Mass Immunization Event screen.
- c. Click the **Worksheet** button to access the Event Worksheet screen.
- d. The **Delete** button is "greyed out" and not functional by design, deletion is not available to USERS.

Create

Update View Delete Worksheet

	Event ID	Event Title	Event Date	Additional Dates	Client List	Provided By	Status
	1330	fRQHR Regina St. Thomas elementary school Gr. 6	2023 Jan 16	2023 Jan 18	Yes	Provider, Regina / Witzel-Garnhum, Heather	Open
	1184	fRQHR Marion McVeety Grade 6	2022 Jun 24	2022 Jun 27 , 2022 Jun 28	Yes	Provider, Regina	Open
	1182	RQHR St. Matthew Elementary school Grade 6	2022 Jun 23	2022 Jun 24	Yes	Provider, Regina / Provider, Sunrise / Provider, Bill	Open
	1176	fRQHR St. Matthew elementary school grade 6	2022 Jun 23		Yes	Provider, Regina / Provider, Mamawetan / Provider, Sunrise	Open

Total: 4 1 20

Adding or Removing Clients from the Mass Immunization Client List

There may be situations where the Ministry of Education data in Panorama does not match the actual class list. The Event Worksheet provides functions to either add or remove clients manually to reconcile the electronic worksheet with the paper class list.

Scroll down to the Client list section.

Manually Add a Client to the Mass Immunization Event

1. Perform a client search to find the desired client. After searching for the client, the Search Results section will appear.
2. From the Search Results section, select the desired client and click the Add button to the right of the name.

The oldest forecast within this group of clients: 2022 Jun 23 12:03 CST
All the clients in this event were last forecasted as a group on: 2023 Jan 16 09:33 CST
Next Scheduled Forecasts for Client List:

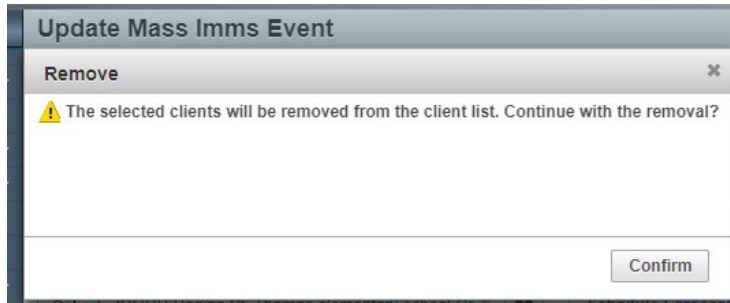
3. The Update Mass Immunization Event screen will reappear, and the system will display a message indicating the client has been successfully added to the client list. Click Save to save the client.

Manually Remove a Client from the Mass Immunization Event

1. To remove a client from the Client List, select the desired client from the Client List section and click the Remove button. Only clients with no event status can be removed from the Mass Immunization Event.

Client ID	Client Name	Date of Birth	Gender
75226	Backenstose, Tia	2000 Jan 02	Female
62881	Baugh, Jens	2011 Nov 09	Male
31333	Baugh, Johnnavius	2011 Aug 23	Male
39899	Brighenti, Boris	2011 Jun 21	Female
86361	white, Star	2011 Feb 15	Female

The system will display a popup asking to confirm removal of the client. Click **Confirm** to remove the client from the Client List



2. The system will display a popup stating - Where applicable, the selected clients have been successfully removed from the client list. Click the **Confirm** button.
3. Scroll to the top of the page and click on SAVE.

Recording Consent Directives and Client Follow-up Using the Event Worksheet

As completed consent forms are returned to the lead school nurse, the client's record can be reviewed and updated from the Event Worksheet. Document Consent Directives. Any required follow-up can be documented in the form of a Communication Event.

ALERT: If consent directives are documented after the immunization event, the Mass Imms work sheet **WILL NOT** re-date the consent readiness. The consent readiness will not change to grant or refusal and continue to state "missing".

Accessing the Event Worksheet

From the **Left-Hand Navigation**, select **Immunization > Mass Immunization Event**.

1. The Search Mass Immunization Event screen will appear.
2. Search and Select the desired event from the Search Results.
3. See Accessing the Mass Immunization Event for detailed steps on how to access the Mass Immunization Event.
4. Select the desired mass imms event by clicking on the radio button next to it. Click on the work sheet button.

Event Worksheet

Cohort ID: 370 Cohort Name: RQHR St Andrew School Grade 6 Encounter Group(s): Immunization Client List Name/ ID: RQHR St Andrew School Grade 6 / 417

Event Title: RQHR St Andrew School Grade 6 Event Date: 2016 Oct 19 , 2016 Oct 20 Event Type: School Grade 6 Event ID: 237 Location: Saint Andrew School Status: Open Created By: Training, User M Dr

Displaying 5 out of 5 available clients

Client List: RQHR St ... Client: Client Last Name or ID Search Type: Add

Alerts Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Generate Letters

Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
☐	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---
☐	76668	Cavness, Noemie	2011 Jan 01	Female	MMR-Var	Overdue	Refused	---

Using the Event Worksheet Filters

From the Event Worksheet section, filters are available to easily sort and navigate between clients in the Mass Immunization Event.

1. Optionally click a column header to automatically sort the table by the selected column.

Event Worksheet

Event Title: RQHR St Andrew School Grade 6 Event Date: 2016 Oct 19 , 2016 Oct 20 Event Type: School Grade 6 Event ID: 237 Location: Saint Andrew School Status: Open Created By: Training, User M Dr

Displaying 5 out of 5 available clients

Client List: RQHR St ... Client: Client Last Name or ID Search Type: Add

Alerts Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Generate Letters

Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
☐	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---

- Optionally enter the client's last name into the **Client Name** column header field to filter the table by the client's name.

Event Worksheet ✓ ⬆

Event Title: RQHR St Andrew School Grade 6
Event Date: 2016 Oct 19 , 2016 Oct 20
Event Type: School Grade 6

Event ID: 237
Location: Saint Andrew School
Status: Open
Created By: Training, User M Dr

Displaying 5 out of 5 available clients

Client List: RQHR St ... Client: Client Last Name or ID Search Type: [v] [i] [Q] [Add]

Alerts Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Generate Letters
Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immunizi... Agent	Forecast Status	Consent Readiness	Event Status
	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---

- Optionally select the **Filter** field (if available) in the column header to show or hide rows based on the displayed value in the column.

Event Worksheet ✓ ⬆

Event Title: RQHR St Andrew School Grade 6
Event Date: 2016 Oct 19 , 2016 Oct 20
Event Type: School Grade 6

Event ID: 237
Location: Saint Andrew School
Status: Open
Created By: Training, User M Dr

Displaying 5 out of 5 available clients

Client List: RQHR St ... Client: Client Last Name or ID Search Type: [v] [i] [Q] [Add]

Alerts Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Generate Letters
Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immunizi... Agent	Forecast Status	Consent Readiness	Event Status
	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---

- For example, click the **Filter** field under the Consent Readiness header and select "Granted" to only show clients who have grants as consent directives.

Recording Consent Directives

- From the Event Worksheet screen, select the desired Client, ensuring their information matches the student's consent form information. The **Row Actions** found in the table header will become active.

Event Worksheet Update Event More log print ?

Cohort ID: 1308 info Cohort Name: Rob Test 001 Encounter Group(s): Immunization Client List Name/ ID: Rob Test 001 / 1337

Event Worksheet ✓ ↑

Event Title: Rob Test 001 Event ID: 1153
 Event Date: 2018 Oct 10 Location: Lloydminster Alta-Sask Wellness
 Event Type: School Grade 6 Status: Open
 Created By: Hayes, Rob

Displaying 60 out of 60 available clients

Client List: Rob Test 001 Client: Client Last Name or ID Search Type: info Q Add

Alerts **Record Consent** **Record Immunization** **Client Event Status** **Client Event Summary** **Deferrals** **Generate Letters** **Ethnicities**

Clear Filters **View Consent** **Preview Client** **Update Client** **Assess and Immunize** **Client Imms Profile** **Clinical Notes**

☐	Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
☒		69378	[REDACTED]	2014 Feb 01	Female	HB	Up To Date	Granted	Immunized
☐		69378	[REDACTED]	2014 Feb 01	Female	HPV-9	Up To Date	Missing	Immunized
☐	!	36572	[REDACTED]	2014 Mar 17	Female	HB	Not Forecasted	Missing	Immunized

- Click the **Assess and Immunize** button. The Assess and Immunize screen will appear.

Assess and Immunize Return Record Consent Record Immunization More print ?

Client ID: 76667 info Name (Last, First Middle) / Gender: Cavness, Mozella / Male Preferred Alternate Name: Health Card No: -
 Date of Birth / Age: 2005 Mar 22 / 18 years 4 months EST Phone Number: Address: Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client Immunization Profile ✓ ↑

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

Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
HB	2016 Mar 29	11y 0m	Valid		ENGERIX ADULT	Left arm	1 mL
HB	2016 May 16	11y 1m	Invalid		ENGERIX ADULT	Right arm	1 mL
Men-P-ACYW-135	2016 May 16	11y 1m	Valid		MENOMUNE	Left arm	0.5 mL
MMR-Var	2016 Mar 23	11y 0m	Valid		PRIORIX-TETRA	Left arm	0.5 mL
Tdap	2016 Apr 27	11y 1m	Valid				
Tdap	2016 Apr 27	11y 1m	Invalid				
Total: 6							

- Review the Client's Panorama Immunization Profile. The Assess and Immunize screen provides a summary of the Client's Panorama Immunization Profile. A checkmark will be placed next to the tab title to indicate data exist.

Assess and Immunize Return Record Consent Record Immunization More print ?

Alerts **Comm Log** Active

Client ID: 75228 info Name (Last, First Middle) / Gender: Backenstose, Tia / Female Preferred Alternate Name: Health Card No: -
 Date of Birth / Age: 2000 Jan 02 / 23 years Phone Number: Address: Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client Immunization Profile ✓ ↑

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

Agent	Date Administered	Age at Administration	Status	Revised Dose	Trade Name	Body Site	Volume
HB	2023 Jan 16	23y	Valid		ENGERIX ADULT	Left arm	1 mL
HPV-9	2023 Jan 16	23y	Invalid (dose)		GARDASIL9	Right arm	0.5 mL

4. Prior to entering consent directives for a student, it is important to review the client record for Client Warnings, Special Considerations, Risk Factors, Immunization History, Immunization History Interpretation, etc. **NOTE: The Immunization Forecast is not a reliable tool as vaccine forecasting rules may not be up to date or inactivated. Clinical assessment is required!**

Directive ID	Directive Status	Antigen	Instruction	Effective From	Effective To	Created by Organization
35383	Confirmed	Hepatitis B (HB-regular)	Grant	2023 Jan 13		Regina Qu'Appelle RHA
35384	Confirmed	HPV-9	Grant	2023 Jan 13		Regina Qu'Appelle RHA

5. Once a review of the client's record has been completed, following regional standard work practices, click the Record Consent button.

Assess and Immunize [Return] [Record Consent] [Record Immunization] [More] [Print] [Help]

Client ID: 76667 [Info] Name (Last, First Middle) / Gender: Cavness, Mozella / Male Preferred Alternate Name: Health Card No: Date of Birth / Age: 2005 Mar 22 / 18 years 4 months EST Phone Number: Address: Additional ID Type / Additional ID: Provincial health service provider identifier / -

6. The Record Consent for Service section will display all Immunizing Agent(s) associated to the Mass Immunization Event.

Assess and Immunize [Return] [Record Consent] [Record Immunization] [More] [Print] [Help]

Record Consent for Service

Clients: Blackburn, Kulbart

Consent will be recorded for agents: ☐ HB ☐ HPV-9 ☐ Men-C-ACYW-135

Number of Doses: []

* Instruction: [Grant] Reason for Refusal: [] Reason Description: []

* Effective From: [2023/08/17] To: [yyyy/mm/dd] Form of Consent: []

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

Consent Given To: ☒ Not Specified ☐ Name [] [Current User]

Comments: []

[Save] [Reset]

7. Complete the required fields for an informed consent grant or refusal in the Record Consent for Service section.
 - a. Ensure that **only the applicable Agent(s) the student is eligible for are selected** (i.e., if completed a HB series at a younger age).
 - b. Document a grant or refusal.
 - c. Ensure the **Effective From Date** is the date the parent or guardian signed the returned consent form.
 - d. Document if verbal or written consent directives have been provided.
 - e. Ensure the **Consent Given By** field includes the parent's or guardian's first and last name, and **Consent Given To** includes the Lead School Nurse's first and last name.
8. Click the **Save** button to save the Consent Directive. The screen will refresh, and the system will display a message that the consent directives have been successfully updated. The View Consent readiness tab will also be updated.

Event Worksheet
Update Event
More
log
?

Event Worksheet

Event Title: RQHR St Andrew School Grade 6
Event Date: 2016 Oct 19 , 2016 Oct 20
Event Type: School Grade 6
Event ID: 237
Location: Saint Andrew School
Status: Open
Created By: Training, User M Dr

Displaying 5 out of 5 available clients

Client List: RQHR St... Client: Client Last Name or ID Search Type: Add

Alerts Record Consent Record Immunization Client Event Status Client Event Summary Deferrals Generate Letters
Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---
	76668	Cavness, Noemie	2011 Jan 01	Female	MMR-Var	Overdue	Refused	---

9. The consent directive details for a student can be viewed by returning to the Assess and Immunize Client screen. To view the details of the consent, click on the left side arrows.

View Consent Client Alerts Special Considerations Deferrals Allergies AEFI IHI Risk Factors

Directive ID	Directive Status	Antigen	Instruction	Effective From	Effective To	Created by Organization
35363	Confirmed	Hepatitis B (HB-regular)	Grant	2023 Jan 13		Regina Qu'Appelle RHA
35364	Confirmed	HPV-9	Grant	2023 Jan 13		Regina Qu'Appelle RHA

Total: 2
1
10

10. The immunizer can view the required fields for the specific consent

View Consent Client Alerts Special Considerations Deferrals Allergies AEFI IHI Risk Factors

Directive ID	Directive Status	Antigen	Instruction	Effective From	Effective To	Created by Organization										
35363	Confirmed	Hepatitis B (HB-regular)	Grant	2023 Jan 13		Regina Qu'Appelle RHA										
<table> <thead> <tr> <th>Given By</th> <th>Given To</th> <th>Form of Consent</th> <th>Comments</th> <th>Document</th> </tr> </thead> <tbody> <tr> <td>Guardian: Backenstose, Patricia</td> <td>Heather Witzel-Garnhum</td> <td>Written</td> <td></td> <td></td> </tr> </tbody> </table>							Given By	Given To	Form of Consent	Comments	Document	Guardian: Backenstose, Patricia	Heather Witzel-Garnhum	Written		
Given By	Given To	Form of Consent	Comments	Document												
Guardian: Backenstose, Patricia	Heather Witzel-Garnhum	Written														
35364	Confirmed	HPV-9	Grant	2023 Jan 13		Regina Qu'Appelle RHA										
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Given By	Given To	Form of Consent	Comments	Document												
Guardian: Backenstose, Patricia	Heather Witzel-Garnhum	Written														

Total: 2
1
10

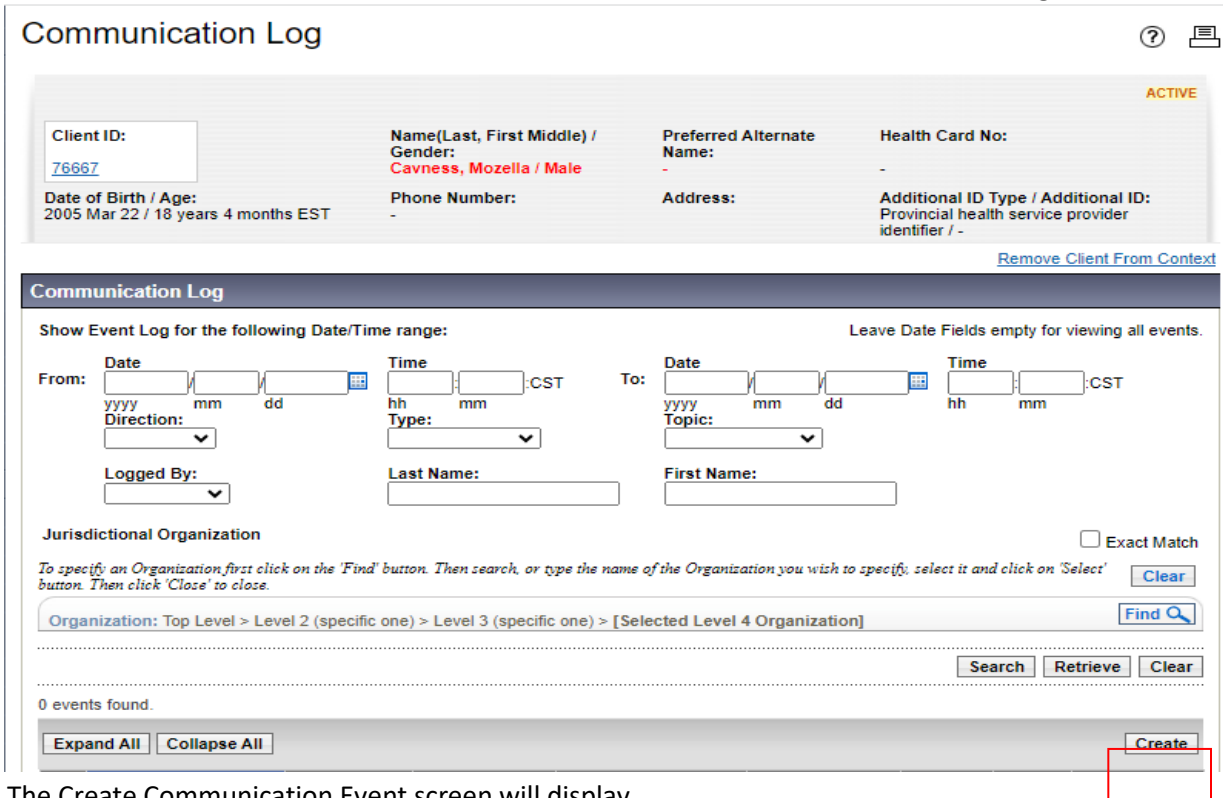
11. If a consent grant was erroneously documented by a nurse, expire the grant by placing client in context from the worksheet; then go to consent directive, add effective to date, and write 'consent was granted in error' in comments and save.
12. Update consent directives as 'refusal', if indicated.

Recording Follow-Up as a Communication Log Event

1. SIM [Chapter 4](#) Appendix 4.2 *Where do I document?* has general scenarios.
2. From the Event Worksheet, select the desired Client and click the **Update Client** button to place the Client into context.
3. From the **Left-Hand Navigation** select **Communications Log**.
4. The Communication Log screen will appear. From this screen, existing Communication Log Events can be retrieved, or new Communication Log Events can be created.

NOTE: Once you access the Communication Log from the Left-Hand Navigation, the Mass Immunization Event will no longer be in context.

5. Click the **Create** button near the bottom of the screen to create a new Communication Log Event.



Communication Log

Client ID: 76667
 Name (Last, First Middle) / Gender: Cavness, Mozella / Male
 Preferred Alternate Name: -
 Health Card No: -
 Date of Birth / Age: 2005 Mar 22 / 18 years 4 months EST
 Phone Number: -
 Address: -
 Additional ID Type / Additional ID: Provincial health service provider identifier / -

[Remove Client From Context](#)

Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: Date: yyyy/mm/dd Time: hh:mm.CST To: Date: yyyy/mm/dd Time: hh:mm.CST
 Direction: [v] Type: [v] Topic: [v]
 Logged By: [v] Last Name: [] First Name: []

Jurisdictional Organization ☐ Exact Match
 To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close. [Clear](#)

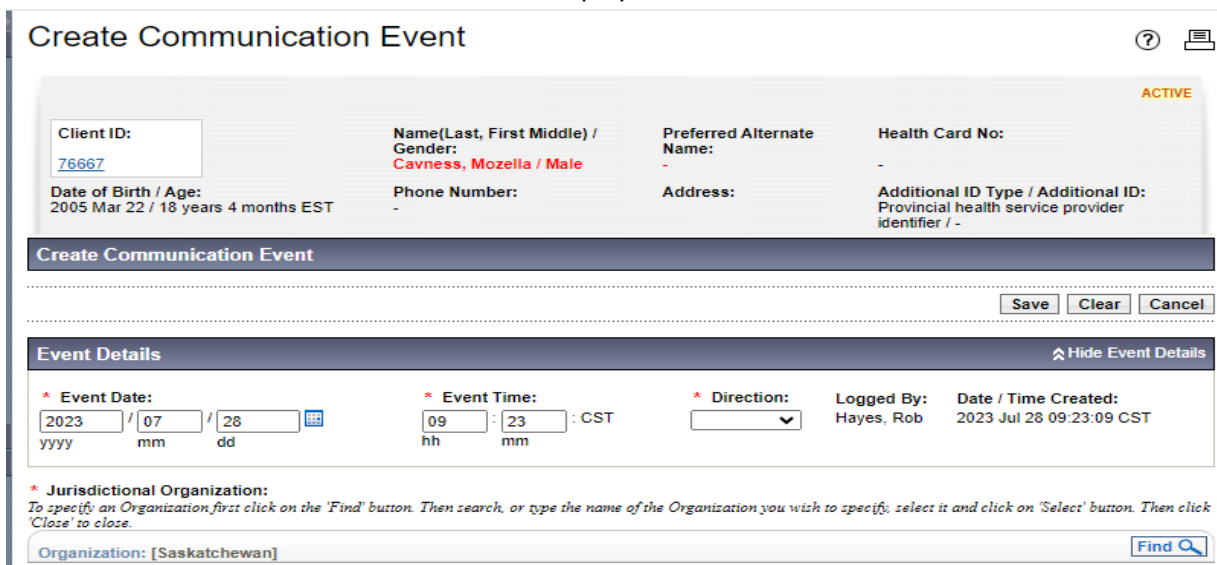
Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] [Find](#)

[Search](#) [Retrieve](#) [Clear](#)

0 events found.

[Expand All](#) [Collapse All](#) [Create](#)

6. The Create Communication Event screen will display.



Create Communication Event

Client ID: 76667
 Name (Last, First Middle) / Gender: Cavness, Mozella / Male
 Preferred Alternate Name: -
 Health Card No: -
 Date of Birth / Age: 2005 Mar 22 / 18 years 4 months EST
 Phone Number: -
 Address: -
 Additional ID Type / Additional ID: Provincial health service provider identifier / -

[Save](#) [Clear](#) [Cancel](#)

Event Details [Hide Event Details](#)

* Event Date: 2023 / 07 / 28 yyyy/mm/dd * Event Time: 09 : 23 : CST hh:mm * Direction: [v] Logged By: Hayes, Rob Date / Time Created: 2023 Jul 28 09:23:09 CST

* Jurisdictional Organization:
 To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close.
 Organization: [Saskatchewan] [Find](#)

7. Complete the required fields found in the Event Details section.
8. Enter the date the event occurred in the **Event Date** field. The current date will be displayed as the default.
9. Enter the time of the event in the **Event Time** field. The current time will be displayed as the default. The recommendation is to document within 24 hours. Revise the date and time if required.
10. Select an appropriate direction from the mandatory **Direction** field.
 - I. **Both**: Conversation between parties occurred at a point in time.
 - II. **Inbound**: Client initiated communication to Public Health.
 - III. **Outbound**: Public Health initiated communication to the client, parent or guardian.

Create Communication Event

Save

Clear

Cancel

Event Details

* Event Date:

2023

/

07

/

28

yyyy

mm

dd

* Event Time:

09

:

23

:

CST

hh

mm

* Direction:

Logged By:

Hayes, Rob

Date / Time Created:

2023 Jul 28 09:23:09 CST

Hide Event Details

* Jurisdictional Organization:

To specify an Organization, first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify; select it and click on 'Select' button. Then click 'Close' to close.

Organization: [Saskatchewan]

Find

Client Information:

Show Person Details

Communication Details

Hide Communications Details

* Communication Type:

* Topic:

Outcome(s):

Follow-Up Required

No Follow-Up Required

Title (Description of communication):

Comments:

(4000 characters)

Add

Date/Time

Comments

Recorded By

Save

Clear

Cancel

Page 25

11. Since the Client record is already in context, the Client Information section will be completed with the client's demographics.

Create Communication Event

Save

Clear

Cancel

Event Details

Hide Event Details

* Event Date:

2023

/

07

/

28

yyyy

mm

dd

* Event Time:

09

:

23

:

CST

hh

mm

* Direction:

Logged By:

Hayes, Rob

Date / Time Created:

2023 Jul 28 09:23:09 CST

* Jurisdictional Organization:

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify; select it and click on 'Select' button. Then click 'Close' to close.

Organization: [Saskatchewan]

Find

Client Information:

Show Person Details

Communication Details

Hide Communications Details

* Communication Type:

* Topic:

Outcome(s):

Follow-Up Required

No Follow-Up Required

Title (Description of communication):

Comments:

(4000 characters)

Add

Date/Time

Comments

Recorded By

Save

Clear

Cancel

12. Complete the required fields found in the Communication Details section.
- Select the type of communication from the mandatory **Communication Type** field.
 - Select the appropriate topic from the mandatory **Topic** field.
 - Select the appropriate outcome from the **Outcome** field. Outcome is not a mandatory field, however for second or third Communication Event attempts, Follow Up Required or No Follow Up Required may be selected.
 - Enter an appropriate title/topic for the Communication Event in the **Title** field.
 - Enter appropriate comments in the **Comments** field that are objective and succinct.
 - Click the **Add** button to add the comments to the Communication Event.
13. Click the **Save** button to save the Communication Log Event. The Communication Event Details screen will appear. A message will be displayed at the top indicating the Communication Event was successfully created.

NOTE: Once the Communication Log Event has been saved, the Details screen will display an option to assign a task and attach a document to the Communication Log Event. These functions are currently not supported by Panorama.

14. Click the **Cancel** button to navigate back to the Communication Log.
The Communication Log screen will appear.

Communication Log

[Comm Log](#) ACTIVE

Client ID:
76667

Name (Last, First Middle) / Gender:
Cavness, Mozella / Male

Preferred Alternate Name:
-

Health Card No:
-

Date of Birth / Age:
2006 Mar 22 / 18 years 4 months EST

Phone Number:
-

Address:
-

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

[Remove Client From Context](#)

Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: **Date** **Time** CST **To:** **Date** **Time** CST

Direction: **Type:** **Topic:**

Logged By: **Last Name:** **First Name:**

Jurisdictional Organization ☐ Exact Match

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

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] [Find](#)

[Search](#) [Retrieve](#) [Clear](#)

1 events found. To view an event, click on the Event Date/Time.

[Expand All](#) [Collapse All](#) [Create](#)

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
2023 Jul 28 09:23 CST	Outbound	Hayes, Rob	Cavness, Mozella	Phone call	Consent	Attempt to get consent	

Total: 1 [Page 1 of 1](#) [Jump to page:](#)

15. To view the Communication Log, click the hyperlinked Communication Log on top of the Panorama screen.

Deleting a Communication Log Event

1. From the LHN menu select the Communication Log Tab.
2. Click on the blue “hyperlink” under the Event Date/Time column for the event you wish to delete.

Communication Log

Show Event Log for the following Date/Time range: Leave Date Fields empty for viewing all events.

From: Date: / / Time: : : CST To: Date: / / Time: : : CST

yyyy mm dd hh mm yyyy mm dd hh mm

Direction: Type: Topic:

Logged By: Last Name: First Name:

Jurisdictional Organization ☐ Exact Match

To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close. Clear

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization] Find

Search Retrieve Clear

1 events found. To view an event, click on the Event Date/Time.

Expand All Collapse All Create

Event Date/Time	Direction	Logged By	Client Information	Comm Type	Topic	Title	Documents
2023 Aug 15 08:35 CST	Outbound	Hayes, Rob	Bennetts, Barnabas	Phone call	Contact Attempt	Attempt to get consent	

Total: 1 Page 1 of 1 Jump to page:

3. Under the Communication Event Details header, click on the drop list next to the “delete” button.

Panorama

efq-services.ehealthsask.ca/CommEventLogging/pages/celSearch.xhtml

Apps eConnect eHealth Saskatchewan Pan PROD Pan EFD Pan EFQ R1Q Pan R1D EFQ - App Launch P... Sharepoint - eH

Jurisdiction Notifications: Hayes, Rob: IMMUNIZATION_PROVIDE... for Saskatchewan Help Contact Us My Account Change Role Logout

PANORAMA Public Health Solution for Disease Surveillance and Management

WORK MGMT IMMUNIZATION

Recent Work

Client

Search Clients

Client Details

Client Warnings

Client Relationships

Client Households

Consent Directives

Allergies

Risk Factors

Travel History

Imms History

Interpretation

Upload Clients

Cohort

Immunizations

Lab

Upload Data

Notes

Document Management

Communication Templates

Reporting & Analysis

Notifications

Communication Log

Communication Event Details

Client ID: 69378 Name (Last, First Middle) / Gender: Bennetts, Barnabas / Female Preferred Alternate Name: Health Card No: -

Date of Birth / Age: 2014 Feb 01 / 9 years 6 months Phone Number: - Address: Regina, Saskatchewan, Canada Additional ID Type / Additional ID: Provincial health service provider identifier / -

Communication Event Details

Event Details

Event Date: 2023 Aug 15 Event Time: 08:35:00 CST Direction: Outbound Logged By: Hayes, Rob Date / Time Created: 2023 Aug 15 08:36:28 CST

Jurisdictional Organization: To specify an Organization first click on the 'Find' button. Then search, or type the name of the Organization you wish to specify, select it and click on 'Select' button. Then click 'Close' to close. Organization: Saskatchewan > SHA > [Regina Qu'Appelle RHA] Find

Client Information

Last Name: First Name:

Assign Task Save Duplicate Entry Entered in error Information determined to be incorrect Entered in error Delete Cancel Hide Event Details

4. Select “Entered in Error” from the list.
5. Click the “Delete” Button, you will see a warning message that you are about to delete from the Event Log.
6. Click “OK”, you will see a confirmation message that the Communication Event was successfully

deleted.

Communication Log



ACTIVE			
Client ID: 69378	Name(Last, First Middle) / Gender: Bennetts, Barnabas / Female	Preferred Alternate Name: -	Health Card No: -
Date of Birth / Age: 2014 Feb 01 / 9 years 6 months	Phone Number: -	Address: Regina, Saskatchewan, Canada	Additional ID Type / Additional ID: Provincial health service provider identifier / -

Communication Event was successfully deleted.

[Remove Client From Context](#)

Communication Log

Show Event Log for the following Date/Time range:

Leave Date Fields empty for viewing all events.

From:	Date	Time	To:	Date	Time
	yyyy mm dd	hh mm :CST		yyyy mm dd	hh mm :CST
	Direction:	Type:		Topic:	
	Logged By:	Last Name:		First Name:	

Jurisdictional Organization

☐ Exact Match

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

[Clear](#)

Organization: Top Level > Level 2 (specific one) > Level 3 (specific one) > [Selected Level 4 Organization]

[Find](#)

[Search](#) [Retrieve](#) [Clear](#)

Accessing the Update Mass Immunization Event Screen

Updating the Client's Event Status

The Client Event Status will be used to track follow-up progress, including the number of attempts made to retrieve consent, absent clients and clients that have moved.

- From the Event Worksheet screen, select the desired Client. The **Row Actions** found in the table header will become active.

Event Worksheet

Cohort ID: 1308 Cohort Name: Rob Test 001 Encounter Group(s): Immunization Client List Name/ ID: Rob Test 001 / 1337

Event Title: Rob Test 001 Event Date: 2018 Oct 10 Event Type: School Grade 6 Event ID: 1153 Location: Lloydminster Alta-Sask Wellness Status: Open Created By: Hayes, Rob

Displaying 60 out of 60 available clients

Client List: Rob Test 001 Client: Client Last Name or ID Search Type: Add

Alerts Record Consent Record Immunization **Client Event Status** Client Event Summary Deferrals Generate Letters

Clear Filters View Consent Preview Client Update Client Assess and Immunize Client Imms Profile Clinical Notes

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
	40	Merge1, Client1	2014 Jan 01	Female	HB	Not Forecasted	Granted	---
☒	40	Merge1, Client1	2014 Jan 01	Female	HPV-9	Up To Date	Missing	---
☐	61	Branyon, Torie	2014 Jan 07	Male	HB	Not Forecasted	Refused	---

- Click the **Client Event Status** button. The Update Client Event Status section will appear.

Update Client Event Status

Clients: Cavness, Mozella

Client Event Status will be updated for:

☒ MMR-Var

* Client Event Status:

Absent for Immunization

Consent Attempt 2

Consent Attempt 3

Moved out of School

To Be Seen at PHO

Reset

- Select the appropriate option from the **Client Event Status** field options shown above.
- Select the appropriate agent(s) that the status applies to from the **Client Event Status will be updated for** field. More than one agent can be selected.

- Click the **Save** button to save the new Client Event Status. The system will display a message that the Client Event status has been updated successfully.

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
	69378	Bennetts, Barnabas	2014 Feb 01	Female	HB	Up To Date	Granted	Immunized
	69378	Bennetts, Barnabas	2014 Feb 01	Female	HPV-9	Up To Date	Missing	Immunized
	36572	Berendzen, Sommer	2014 Mar 17	Female	HB	Not Forecasted	Missing	Immunized
	36572	Berendzen, Sommer	2014 Mar 17	Female	HPV-9	Up To Date	Missing	Immunized
	67917	Bernat, Oris	2014 Mar 06	Female	HB	Up To Date	Missing	Immunized
	67917	Bernat, Oris	2014 Mar 06	Female	HPV-9	Up To Date	Missing	Immunized
	21247	Berri, Marlene	2014 Feb 08	Male	HB	Up To Date	Missing	Immunized
	21247	Berri, Marlene	2014 Feb 08	Male	HPV-9	Up To Date	Missing	Immunized
	21255	Berri, Marlene	2014 Feb 15	Male	HB	Up To Date	Missing	Immunized

Clients to Be Seen at the Public Health Office – Create a Client Warning

If a client's immunization will be given at the Public Health Office, the client's Event Status can be updated accordingly. Revise the Client MI Event Status to **"To Be Seen at PHO"**, and create a **Client Warning** (e.g., "will attend health centre for school-age vaccines. Consent may be obtained at that time").

- Select the appropriate client from the Event Worksheet and click the Client Event Status button. The Update Client Event Status section will appear.

Event Worksheet

Event Title: RQHR St Andrew School Grade 6
 Event Date: 2016 Oct 19, 2016 Oct 20
 Event Type: School Grade 6

Event ID: 237
 Location: Saint Andrew School
 Status: Open
 Created By: Training, User M Dr

Displaying 6 out of 6 available clients

Alerts	Client ID	Client Name	Date of Birth	Gender	Immuniz... Agent	Forecast Status	Consent Readiness	Event Status
	76666	Bueckers, Varya	2016 Feb 01	Female	MMR-Var	Up To Date	Missing	---
	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---
	76668	Cavness, Noemie	2011 Jan 01	Female	MMR-Var	Overdue	Refused	---
	76670	Cavness, Sacha	2015 Apr 27	Male	MMR-Var	Overdue	Missing	---
	76671	Cavness, Sharline	2011 May 05	Male	MMR-Var	Overdue	Missing	---
	76669	Cavness, Vanna	2015 Jun 02	Male	MMR-Var	Overdue	Missing	---

- Complete all required fields in the Update Client Event Status section.
 - From the Client Event Status field, select the appropriate Event Status: "To Be Seen at PHO".
 - From the Client Event Status will be updated for field, select which Agent(s) this Event Status applies to.
 - Click the Save button to save the Client Event Status.
- Select the client and click the Assess and Immunize button to place the client into context. With the client in context, a Client Warning can be created to document that this client will be seen at the Public Health Office.
- From the Left-Hand Navigation, select Client Warnings.

5. Click the Add button.

The screenshot shows a web application window titled "Client Warnings". At the top, there is a toolbar with buttons: "Add to WQ", "Save", "Reset", "log", a printer icon, a help icon, and a close icon. Below the toolbar is a sub-header "Client Warnings" with an upward arrow icon. The main content area is titled "Add Client Warning" and contains the following fields and controls:

- Effective From:** A date input field with the value "2023/07/28" and a calendar icon.
- To:** A date input field with the placeholder "yyyy/mm/dd" and a calendar icon.
- High Priority:** An unchecked checkbox.
- Message:** A large text area for entering a warning message. Below the text area, it says "(250 characters remaining.)".
- Buttons:** "Apply", "Reset", and "Add" buttons are located at the bottom right of the form.

At the bottom of the window, there is a footer message: "To create a new record click Add." and an "Add" button.

6. Enter an appropriate warning message into the Message field.
7. Click the Submit button to save the new Client Warning.

Updating the Mass Immunization Event

- As close to the Mass Imms event as possible, ensure that all details for a Mass Imms Event are correct!
- Use the Update Mass Immunization Event screen to update the details (i.e., providers, SDL, date change, lot number change) of any Mass Immunization Event with an “Open” status.

Accessing the Update Mass Immunization Event Screen

1. From the **Left-Hand Navigation**, select **Immunization > Mass Immunization Event**. The Search Mass Immunization Event screen will appear.
2. In the Search Results Mass imms event section, enter appropriate search criteria to find your event. Once you have found the desired mass imms event, click the radio button next to the event and click on the Update button.

Updating Mass Immunization Event Agents

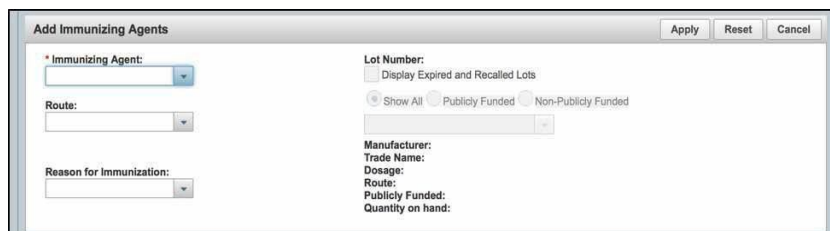
1. Scroll to the Immunizing Agents section on the Update Mass Immunization Event screen. From this section, **agents** and **lot numbers** can be updated, added or removed.



Update Mass Immunization Event				
* Immunizing Agents				
	Immunizing Agents	Lot Number	Route	Reason for Immunization
☐	DTaP-IPV-Hib	A20CB601Z	Intramuscular	Routine
☐	HB	AH8VC234BQ	Intramuscular	Routine
☐	HPV-4	H914657	Intramuscular	Routine

Total: 3

2. **To update** an existing Immunizing Agent, select the desired agent from the table and click the **Update** button. The Update Immunizing Agent section will display.
 - a. Update the fields as required.
 - b. Click the **Apply** button for your changes or click the **Cancel** button to cancel.
 - c. Click Save to save the changes.
3. **To add** a new Immunizing Agent, click the **Add** button. The Add Immunizing Agent section will display.
At a minimum, the **Immunizing Agent** field is required. If the **Lot Number** field is selected, the remaining fields will also be required.



Add Immunizing Agents

* Immunizing Agent:

Route:

Reason for Immunization:

Lot Number:

☐ Display Expired and Recalled Lots

☒ Show All ☐ Publicly Funded ☐ Non-Publicly Funded

Manufacturer:

Trade Name:

Dosage:

Route:

Publicly Funded:

Quantity on hand:

Buttons: Apply, Reset, Cancel

4. Click the **Apply** button to save the new agent or click the **Cancel** button to cancel.
5. Click Save to save the changes.
6. **To remove** an existing Immunizing Agent, select the desired agent from the table and click the **Delete** button.

- The system will display a popup asking to confirm removal of the agent. Click **Confirm** to remove the Immunizing Agent. Click Save to save the changes.

The screenshot shows a table titled "Immunizing Agents" with columns for Agent, Route, and Reason for Immunization. A confirmation dialog box is displayed over the table, asking to confirm the deletion of the agent "HB". The dialog box has a "Confirm" button.

Agent	Route	Reason for Immunization
DTaP-IPV-Hib	Intramuscular	Routine
HB	Intramuscular	Routine
HPV-4	Intramuscular	Routine

- NOTE: if you do not enter your lot numbers, the record immunization button will be greyed out. You will not be able to enter your immunizations at your mass imms event. It is important to check this prior to going out to your mass imms event.**

Updating Mass Immunization Event Providers

Any user may view an existing Mass Immunization Event; however, only providers registered to the Mass Immunization may record Immunization Events.

- It should be noted that **any PHN who opens/updates an Event, must also be listed as a Provider (even if that PHN will not be a Provider on the date of immunization)**. If a PHN makes an update or creates an event and is not listed as a Provider, then the "record immunization" button becomes inactive, and no one can record.
- Scroll to the Event Providers section on the Update Mass Immunization Event screen.
 - From this section, Providers can be added or removed from the Mass Immunization Event.

The screenshot shows the "Update Mass Immunization Event" screen. The "Event Providers" section is visible, showing a table with columns for Provider, Verification Status, Workgroup, and User. The table contains one provider: "Schembri, Kyle" with a "Not Requested" status. The "Add" button is visible in the top right corner of the section.

Provider	Verification Status	Workgroup	User
Schembri, Kyle	Not Requested		

Adding a Provider

- To add an additional Event Provider, click the **Add** button.

The screenshot shows the "Event Providers" section. The "Add" button is highlighted with a red box. The table below shows two providers: "Provider, Regina" and "Provider, Sunrise", both with "Not Requested" status.

Provider ID	Provider	Verification Status	Workgroup	User
2	Provider, Regina	Not Requested		
10	Provider, Sunrise	Not Requested		

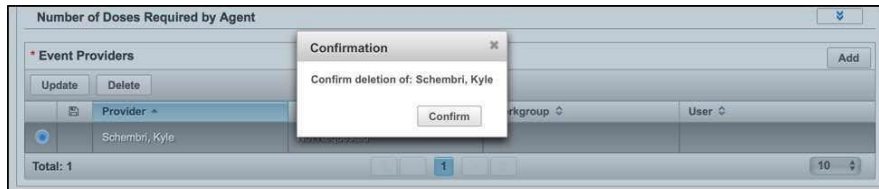
- Enter the first three letters (or more) of the Provider's last name into the **Provider** field. The system will automatically populate the dropdown list. Select the desired Provider from the dropdown menu.

The screenshot shows the "Add Event Providers" dialog box. The "Provider" field has "schembri" entered, and a dropdown list of providers is displayed. The list includes "Provider, Anna, Public Health Nurse", "Provider, Athabasca, Public Health Nurse", "Provider, Bill, Public Health Nurse", "Provider, Bob, Public Health Nurse", "Provider, Janet, Public Health Nurse", "Provider, LTC, Public Health Nurse", "Provider, Mamawetan, Public Health Nurse", "Provider, Pharmacist, Pharmacist", "Provider, Regina, Pharmacy", "Provider, Regina, Public Health Nurse", "Provider, Saskatoon, Public Health Nurse", and "Provider, Sunrise, Public Health Nurse".

3. After selecting the desired Provider, click the **Apply** button to save your selection.
4. Scroll to the top of the Update Mass Immunization Event screen and click the **Save** button to save the Mass Immunization Event.

Removing a Provider

1. To remove a provider, select the provider from the table and click the **Delete** button.
2. The system will display a popup asking to confirm removal of the provider. Click **Confirm** to remove the Event Provider.



3. Scroll to the top of the Update Mass Immunization Event screen and click the **Save** button to save the Mass Immunization Event.

Preparing for Mass Immunization Event Delivery

PSIP TIMELINE:

As close as possible before the school event, prepare for the Mass Immunization Event, as several reports must first be printed. These reports include backup client history in the event of computer or connectivity failure (Offline Cohort/ Client Profile Report), which includes individualized Notice of Immunization (NOI) reports that can be provided to the client after their vaccination. The *Notice of Immunization Report* allows the user to select “the date of immunization” and this date will display on the report.

Accessing the Event Worksheet

1. From the **Left-Hand Navigation**, select **Immunization >Mass Immunization Event**. The Search Mass Immunization Event screen will appear. Enter the appropriate search criteria in the search mass imms event page and click on the Search button.
2. Select the desired event from the Search Results section and click the **Worksheet** button. See Accessing the Mass Immunization Event for detailed steps on how to access the Mass Immunization Event.

Offline Cohort and Client Profile Reports

The Offline Cohort Profile Report will automatically prepare and print client history and the NOI reports for each client in the Mass Immunization Event. The client history produced in this report can be used in the event of computer or connectivity failure.

1. Client information in the Offline Cohort and Client Profile Reports include:

a) Immunization History	g) Precautions
b) Immunization Forecast	h) Warnings
c) Invalid Immunization Summary	i) Risk Factors
d) Deferrals	j) Consent Directive Summary
e) Contraindications (e.g., Special Populations)	k) Clinical Notes
f) Exemptions	l) Communication Log
	m) Notice of Immunization

2. The Offline Cohort Profile Report can be generated by following the steps below:
 - a. From the Event Worksheet, click the **More** button and then **Launch Report** button. The **Launch Report** pop-up box will appear.

Client ID	Client Name	Date of Birth	Gender	Immunization Agent	Forecast Status	Consent Readiness	Event Status
78666	Bueckers, Vanya	2016 Feb 01	Female	MVR-Var	Up To Date	Missing	---
78667	Cavness, Mozella	2005 Mar 22	Male	MVR-Var	Not Forecasted	Granted	---
78668	Cavness, Noemie	2011 Jan 01	Female	MVR-Var	Overdue	Refused	---
78670	Cavness, Sacha	2015 Apr 27	Male	MVR-Var	Overdue	Missing	---
78671	Cavness, Sharline	2011 May 05	Male	MVR-Var	Overdue	Missing	---
78669	Cavness, Vanna	2015 Jun 02	Male	MVR-Var	Overdue	Missing	---

- b. Select **SK011** from the drop-down box and click the **Confirm** button. The Report Filters screen will appear.

- c. The Cohort ID from the Mass Immunization Event in context will automatically be populated. Click the **Generate Report** button to generate the report.

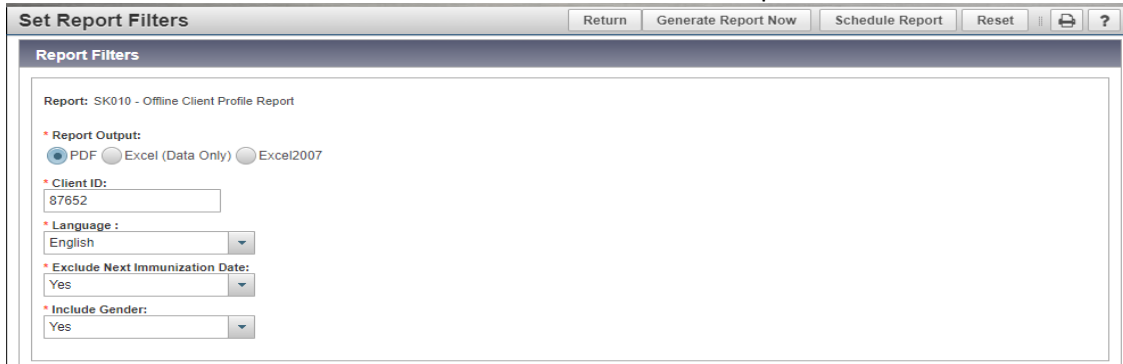
Generating an Individual Offline Client Profile Report

There may be situations where a client was added to the Mass Immunization Event after the Offline Client Profile Report was generated. An individual Offline Client Profile Report can be generated by following the steps below.

1. Before starting, make note of the Client ID, which can be found on the Event Worksheet screen under the Client ID column.
2. From the **Left-Hand Navigation**, select **Reporting & Analysis > Reports**.
3. The Select Reports screen will appear.

4. Click the immunization down arrow to expand the Immunization section.

5. From the Immunization section, click the hyperlink for **SK010 - Offline Client Profile Report**. The Report Filters screen will appear.
 - a. Two reports will be available from this section. SK010 is an individual report, whereas the SK011 report will generate one report for each client in your Mass Immunization Event.
 - b. Enter the noted Client ID into the **Client ID** field found in the Report Filters section.



6. Click the **Generate Report** button.

Notice of Immunization (NOI)

The PHNF401-2-Cohort-Notice of Immunization report in Panorama will automatically prepare and print **NOTE:** The steps to generate the NOI report **do not need to be completed** if you have already generated the Offline Client Profile Report.

all NOI reports for each client in the Mass Immunization Event. This is the same report that is usually provided to the client post-immunization at the school. **The Notice of Immunization Report allows the user to select “the date of immunization” and this date will display on the report.** Ensure the Event Worksheet screen is displayed.

1. From the **Left-Hand Navigation** select **Reporting & Analysis > Standard Reports**. The Select Report Type screen will appear.
2. Click the immunization down arrow to expand the Immunization section.
3. Two PHNF401 reports will be available.
 - PHNF401-2-Cohort is the NOI report that will print out multiple reports for each client in the class list.
 - The single PHNF401 report will print out a single NOI report for a client currently in context.
4. To print the Cohort, click the **PHNF401-2-Cohort-Notice of Immunization** hyperlink from the expanded Immunization section.
5. The Report Filters screen will appear and the cohort ID will automatically be populated.



6. To print off the NOI **for 1 client**, click on the radio button next to their ID, while on the work sheet. Click on the UPDATE client button (they are now in context) and then go to the LHN and click on reporting and analysis –report **PHNF401-Notice of Immunization**. **The Notice of Immunization Report allows the user to select “the date of immunization” and this date will display on the report.**
7. Click the **Generate Report** button. **NOTE:** The NOI cohort reports will appear for printing and include a NOI report for each student on the class list. The client’s demographics will be added to the first field. It is the nurse’s responsibility to complete the remaining fields at the Mass Immunization Event once the client has been vaccinated.

Managing Mass Immunization Event Delivery

PSIP TIMELINE: Day of the event

- Delivery of the Mass Immunization Event will be managed directly from Panorama and the Mass Immunization Event Worksheet screen.
- The Mass Immunization Event Worksheet will enable quick access to the client's record to review history as required and quick data-entry functions to record the Immunization Event at the time of service. As clients present for service, follow the steps below under the Individual Client Review and Entry section.
- If the client is not immunized at the Mass Immunization Event, follow the steps below under the Clients to Be Seen at the Public Health Office or Missing Clients and Deferrals sections.

TIP: To minimize data re-entry, users should always validate Lot Numbers, Providers, Dates for immunization, and Service Delivery Location prior to the Mass Immunization.

Accessing the Event Worksheet

1. From the **Left-Hand Navigation**, select **Immunization > Mass Immunization Event**.
2. The Search Mass Immunization Event screen will appear.
3. On the Search Mass Imms event page enter the appropriate search criteria to find your event.
4. Select the desired event from the Search Results section and click the Worksheet button.
5. See Accessing the Mass Immunization Event above for detailed steps on how to access the Mass Immunization Event.

Individual Client Review and Entry

As students are brought to the immunizing station, the Immunizing Nurse can select the desired Client record from the Event Worksheet to complete the steps below. The steps can then be repeated for each presenting Client.

1. Select the appropriate client and click the **Assess and Immunize** button. The Assess and Immunize screen will appear.



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

Client ID: 80882 [i] Name (Last, First Middle) / Gender: Chow, Billy / Male Health Card No: - Date of Birth / Age: 2005 Apr 01 / 11 years 11 months **Active**

Phone Number: -(-) Jurisdiction Info: Saskatchewan, Saskatoon Regional Health Authority Additional ID Type / Additional ID: Provincial health service provider identifier / -

Client Immunization Profile [v] [u]

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

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

ID	Directive Status	Antigen	Instruction	Effective From	Effective To	User's Organization
28967	Expired	Diphtheria (D)	Grant	2017 Mar 13	2017 Mar 11	Saskatchewan
28968	Expired	Haemophilus influenzae type b (Hib)	Grant	2017 Mar 13	2017 Mar 11	Saskatchewan

2. The Assess and Immunize screen provides an overview of the client's profile. The client is placed into context when the Assess and Immunize screen appears. **NOTE: If you navigate to the Left-Hand Navigation, the user is no longer in the Mass Immunization Event.**

Review the Client Profile and Confirm Consent Directives

1. Perform the client review as including their:
 - a. Immunization History
 - b. Special Considerations
 - c. Client Warnings
 - d. Clinical Notes (for migrated SIMS data)
 - e. Risk Factors
 - f. Immunization History Interpretation records
 - g. Pertinent Consent Directives

NOTE: The Immunization Forecast is not a reliable tool as vaccine forecasting rules may not be up to date or inactivated. Clinical assessment is required!

Recording the Mass Immunization Event

Alert: DO NOT enter any vaccines listed on your worksheet via the LHN!

NOTES:

- If the client is eligible for the vaccine, and the client has been immunized, continue to the step below to record the Immunization Event in Panorama.
- If the client is not eligible for the vaccine, complete any Panorama follow-up required in your region and repeat the steps above for the next presenting client.

ID	Directive Status	Antigen	Instruction	Effective From	Effective To	User's Organization
28967	Expired	Diphtheria (D)	Grant	2017 Mar 13	2017 Mar 11	Saskatchewan
28968	Expired	Haemophilus influenzae type b (Hib)	Grant	2017 Mar 13	2017 Mar 11	Saskatchewan

1. From the top of the screen, click the **Record Immunization** button.
2. Complete all required fields in the **Immunization Data Entry – Provider Recorded** heading. All Immunizing Agent(s) assigned to this Mass Immunization Event will be listed, regardless of the client's current forecast.
3. Select the current date from the **Date Administered** field. Only dates available for the Mass Immunization Event will be listed. **If there is more than one date, ensure you have chosen the correct date.** You will not be able to save an immunization for a date in the future. Ensure that your dates are correct on the Mass imms worksheet. If you don't update it, you can save an immunization if the date has passed.
4. Select either **Enter Time** or **Use Current Time** under **Time Administered** to note the time that the Immunization was delivered. If **Enter Time** is selected, enter the appropriate time into the hh and mm fields. In most situations, the current time will be appropriate.
5. Select one or more **Immunizing Agent(s)** from the table. Multiple Immunization Events can be recorded at the same time.

IMPORTANT: Ensure the client is eligible for the vaccine before proceeding with the steps below. Immunization Events can be recorded for clients with a Missing Consent Status. In this situation, an Audit Log Entry is created that the User has chosen to ignore the requirement to obtain consent.

- A message is displayed when immunizing with no consent for the agent being administered. There is no option to cancel and is just a message for your awareness. You can still record consent if it was missed.

Return Record Consent Record Immunization More

Active

Client: Vincent Piquin

Preferred Alternate Name: Health Card No:

Address: Address:

The following immunizations have been recorded but consent was missing: A consent bypass with reason of Clinical has been issued on the immunization(s): 36119:MMR.

Forecast by Agent Forecast by Disease

6. Confirm the remaining pre-populated fields are correct for each Immunizing Agent, including the **Lot Number, Dosage, Site** and **Provider**. These options are limited to the options added when creating the Mass Immunization Event.

Event Worksheet Update Event More

Record Immunization

Clients: white, Star

* Date Administered:

Time Administered:

☐ Leave blank

☐ Enter time: hh:mm

☒ Use current time

☒ Provider Recorded ☐ Non-Provider Recorded

Immunizing Agent	Lot Number	Trade Name	Route	* Dosage	* Site	* Provider
☒ HB	AHBVC310AG Exp. 2025 Oct 31	ENGERIX ADULT	Intramuscular	1		Provider, Regina
☒ HPV-9	4ROB4CAST Exp. 2050 Jan 01	GARDASIL9	Intramuscular	0.5		Provider, Regina
☒ Tdap	OP12Tdap Exp. 2075 Jul 31	ADACEL	Intramuscular	0.5		Provider, Regina

Save Reset

7. Click the **Save** button to save the Immunization Event(s). The system will display a message that the Immunization records have been successfully created.
8. Click the **Return** button on the Assess and Immunize screen to return to the Event Worksheet.

Adding Additional Vaccines

REMINDER: Any vaccines entered via the Left-Hand Navigation, will not be populated on the Mass Immunization Event worksheet.

If your client requires additional vaccines not included in the Mass Immunization Event, you can navigate away from the Mass Immunization Event and complete this task via the **Left-Hand Navigation** by selecting **Immunizations > Immunization Profile**. They will not be populated on the Mass Imms event worksheet.

Mass Immunization Event Follow-Up

Follow-up after the event may be required for several reasons. Immunization Events may not have been recorded on-site, or consent forms may have been hand delivered during the event by a student. In both situations, these records must be transcribed into Panorama to become part of the client's Panorama record.

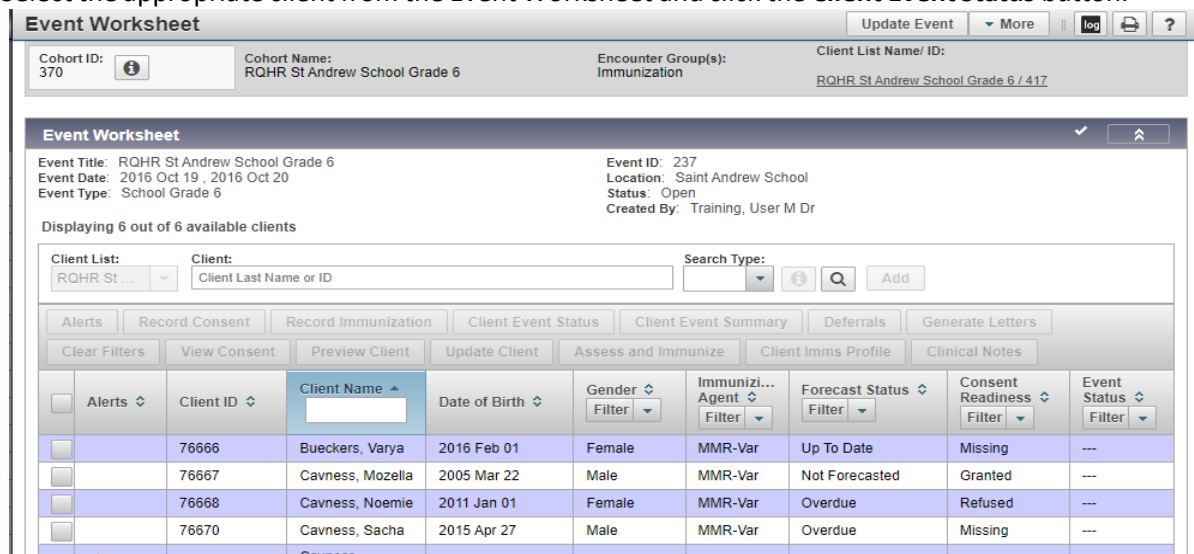
Follow-up Data Entry

1. From the Event Worksheet, select the first client requiring follow-up data entry.
2. Click the relevant action button to expand the desired data-entry section.

Missing Clients and Deferrals

If a client is absent during the Mass Immunization Event, the client's Event Status must be updated accordingly.

1. Select the appropriate client from the Event Worksheet and click the **Client Event Status** button.



Event Worksheet

Cohort ID: 370 Cohort Name: RQHR St Andrew School Grade 6 Encounter Group(s): Immunization Client List Name/ ID: RQHR St Andrew School Grade 6 / 417

Event Title: RQHR St Andrew School Grade 6 Event ID: 237
 Event Date: 2016 Oct 19 , 2016 Oct 20 Location: Saint Andrew School
 Event Type: School Grade 6 Status: Open
 Created By: Training, User M Dr

Displaying 6 out of 6 available clients

Alerts	Client ID	Client Name	Date of Birth	Gender	Immunization Agent	Forecast Status	Consent Readiness	Event Status
☐	76666	Bueckers, Varya	2016 Feb 01	Female	MMR-Var	Up To Date	Missing	---
☐	76667	Cavness, Mozella	2005 Mar 22	Male	MMR-Var	Not Forecasted	Granted	---
☐	76668	Cavness, Noemie	2011 Jan 01	Female	MMR-Var	Overdue	Refused	---
☐	76670	Cavness, Sacha	2015 Apr 27	Male	MMR-Var	Overdue	Missing	---

2. The Update Client Event Status section will appear.
3. Complete all required fields in the Update Client Event Status section.
 - a. From the **Client Event Status** field, select the appropriate Event Status: Absent for Immunization, consent attempt 2, consent attempt 3, moved out of school, or to be seen at PHO.
 - b. From the **Client Event Status will be updated for** field, select which Agent(s) this Event Status applies to.

4. Click the **Save** button to save the Client's Event Status.

NOTE: Each Client Event Status (e.g., Absent for Immunization) can only be captured once per antigen. To capture a subsequent Client Event Status for the same antigen, users can record this information in the Communication Log.

Event Worksheet

Update Client Event Status

Clients:
Blackley, Samara

Client Event Status will be updated for:

☒ HB

☒ HPV-9

☒ Men-C-ACYW-135

Client Event Status:

Absent for Immunization

Consent Attempt 2

Consent Attempt 3

Moved out of School

To Be Seen at PHO

Reset

Client Name

Blackburn, Kulbart

Mass Immunization Event Closure

- Mass Immunization Events can have multiple statuses, and it's important the correct status is selected to inform other Panorama Users of the Mass Immunization Event's current state.
- This section will explain how to update the Mass Immunization Events which can be done once the Mass Immunization Event has been delivered, or whenever one of the statuses listed below applies to the event.

Mass Immunization Event Status

- **Open:** The Mass Immunization Event is currently active, and the Lead Nurse or Immunizing Team is working on obtaining consent and preparing for immunization delivery, leave it open until finished completely (i.e., if changed to "complete," the reason will not be able to print your cohort profile reports.
- **Cancelled:** The Mass Immunization Event has been postponed indefinitely and will not occur in the future.
 - **Do not cancel if the date is just rescheduled or the date is postponed.** Typically, it would be cancelled if a work sheet was created in error. If it is cancelled, all the information will be lost.

NOTE: Events that have been rescheduled are not Cancelled events. Rescheduled events should remain Open and, instead, the Event Date field can be updated from the Update Mass Immunization Event Screen.

- **Completed:** The Mass Immunization Event has finished. The Mass Immunization Event will no longer be used to record data or follow-up; however, the Event Worksheet can still be reviewed. Note: Grade 6 round 1 will be completed prior to creating a new Mass Immunization event for Grade 6 round 2.

Accessing the Update Mass Immunization Event Screen

1. From the **Left-Hand Navigation**, select **Immunization > Mass Immunization Event**. The Search Mass Immunization Event screen will appear.
2. From the Search Mass Imms event screen, enter the appropriate search criteria to find your event. See Accessing the Mass Immunization Event on page 16 for detailed steps on how to access the Mass Immunization Event.

Changing the Mass Immunization Event Status

1. From the Update Mass Immunization Event screen, update the **Status** field as desired. For example, set the **Status** field to "Completed".

2. Click the **Save** button at the top of the screen.

IMPORTANT: This step cannot be undone. Once the status is updated, it cannot be changed back to Open. There is no time limit for updating a Mass Immunization Event's Status. Consider waiting until the very last moment to update the event.