m-IMMS

User Guide

Contents

Contents

Revision History 6
Introduction – m-IMMS 7
Background 7
Purpose 7
Added Benefits 8
Format 9
Section A: m-IMMS Application 10
Registration and Login for m-IMMS 11
Users Roles and Login Information 11
MaaS360 11
Device and Application Timeouts 11
iPad device: 11
Creating a TouchID: 12
NEW iOS 14 and default settings – To be able to Download Security Token 12
NEW How to Generate a Security Token for m-IMMS 13
How to Delete Token from iPAD 20
Multiple Users per iPad 34
Missing Tablets 38
m-IMMS Functionality Overview 21
Roles –Functionality 3.1 21
Clinical – Nursing 21
Admin/Clerical Role –3.1 Functionality 22
Hybrid Mode – 3.1 Functionality Optional 22
Clinics 23
Pre-Clinic 23
Downloading Clinics 24
Sharing Downloaded Clinics 24

Clinic Day 27
Clinic Status Icon 28
Clinic Information Screen 29
Clinic Dashboard 29
Client List Screen 31
Service Status 32
Search Existing Client 33
Creating New Clients – PHIX Integration –3.2 Functionality 35
Wizard – Navigation 39
Demographics 41
Alerts 43
Immunization Assessment 45
Adding Historical Immunizations –3.1 Functionality 46
Forecast by Agent 48
Forecast by Disease 48
Consents 53
Adding a Consent 54
Consent 54
Administer Immunizations 55
Recording Immunizations in m-IMMS 57
Adding New Agent/Lot Number 58
Post-Clinic: 61
3.3 Functionality 61
Support – Features 61
Consent for Disclosure 61
View Suspensions 62
View Suspension Information 62
3.4 Functionality 63
Rescind Suspensions 63
Editing Clinical Notes 64

Advanced Search 65
Canadian Granular Addresses 67
5.0 Functionality (Compatibility with Panorama 3.1) 67
Features: 67
Special Considerations – new functionality: Download as per Panorama 3.1 67
Ability to add Special Considerations based on Agent 67
Special Considerations created with agent are now saved as agent and no longer broken down to antigens 67
Special Considerations list now reflect Agent/Antigen/Disease type 67
Fixes 67
5.1 Functionality 67
User Info and Application Info 67
Release 5.1.2 June 24, 2019 69
Release 5.2.129 October 2019 70
Release 5.3.133 December 16, 2019 71
Release 5.3.1 January 31, 2020: 72
Release 5.4 March 23, 2020: 73
Release 5.4 FIXES 73
Section B: m-IMMS Data Dictionary 74
Appendix A: m-IMMS Warning and Error Messages 88
Error Messages 88
Resources and Support: 92
Fixed defects 92
Support Contact Information 92

Copyright & Disclaimer

Government of Ontario reserves the right to make changes in the information contained in this publication without prior notice. The reader should in all cases consult the Document History to determine whether any such changes have been made.

©2015 Government of Ontario. All rights reserved.

Other product or brand names are trademarks or registered trademarks of their respective holders. This document contains proprietary and confidential information about Government of Ontario, disclosure or reproduction is prohibited without the prior express written permission from Government of Ontario.

Revision History

Date	Version	m-IMMS Release	Description
July 2016	1.0	1.0	Limited Production Release
November 2016	2.0	2.5	Release 2.5
March 2017	2.5	2.6	Release 2.6
July 2017	2.7	2.7	Release 2.7
October 2017	3.0	3.1	Release 3.1
October 23, 2017	3.2	3.2	Release 3.2
November, 2017	3.3	3.3	Release 3.3
December, 2017	3.4	3.4	Release 3.4
January, 2018	4.0	4.0	Release 4.0
October, 2018	5.1	5.1	Release 5.1
June 2019	5.2	5.2	Release 5.2
October 2019	5.2.129	5.2.129	Release 5.2.129
December 9, 2019	5.2.1(47)	5.2.1(47)	5.2.1(47)
January, 2020	5.3. 1	5.3.1	5. 3. 1
March 23, 2020	5.4	5.4	Release 5.4
Sept 28, 2020	5.5	New way to create security token	R5.5

Introduction – m-IMMS

Background

In Ontario, PHUs use Panorama as the province's immunization repository. Panorama is also designed to support PHU activities at point of service for immunization administration, for example mass immunization clinics. In some instances, internet connectivity may be unavailable or weak at offsite clinics held at places such as schools or remote locations. In response, the Public Health Solutions I&IT Branch (PHS) developed the Mobile Imms (m-IMMS) application as a seamless extension of Panorama that can be used regardless of internet connectivity.

The objectives of this project are to:

- Provide a secure electronic tool for PHUs to collect and enter immunization data at the clinic where there is a lack of internet connectivity.
- To reduce manual re-entry of immunization data.
- Clinic and client information streamlined.
- Displays client information in a logical order to assist the clinician with preforming a thorough assessment before administering and recording an immunization.

Purpose

The purpose of m-IMMS User Guide document is to outline establish common definitions, data entry practices and provide a non-technical guidance on how to best use m-IMMS as a tool for clinics. This document combines the following information:

- m-IMMS functionality
- Highlighted features (added benefits)
- Overview and scope
- Best practices recommendations
- Outlines system defects

*Note that the initial release of m-IMMS is intended for use at PHU clinics held at schools as per the *Immunization of School Pupils Act*, 1990 (ISPA), but has functionality that will support all clinic types.

Public Health Solutions I &IT Branch has evaluated the privacy features of m-IMMS to confirm that it provides sufficient support in protecting personal health information through the application.

*Note that the Privacy Impact Assessment (PIA) also applies to PHUs.

This document will be updated to support implementation of future PHIX Releases. For any questions or concerns, contact the Public Health Solution service desk at 1-866-272-2794 or PublichHealthSolutions@ontario.ca.

Added Benefits

Unlike the multi-purpose use of Panorama as an immunization repository and clinic tool, m-IMMS is exclusively designed for operational use as a data collection tool at a clinic. As a result, m-IMMS offers an enhanced user experience while working with Panorama data. In m-IMMS, users will see the following added benefits that support their operational needs.

Functionality	Description
Clinic searches	Cleaner results because m-IMMS only shows 2 weeks of active clinics created by the user's PHU
Improved client name searches	Allows users to search by first or last name rather than only by last name.
Clinical Note and Communication Log searches	Users can search both the Subject Line/Topic and body/comment of the note/communication log by keyword rather than just by the Subject Line.
Clients monitored in real time	The Service column on the ***Client List*** screen based on detailed logic that provides users with ability to track whether a client needs to be assessed or if a service has been provided during the clinic. Users can keep track in real time of how many clients have had services provided, or if the client is absent etc.
Tidier information for clinic assessment	m-IMMS removes "clutter" in Panorama since the app only displays client level information that a provider needs for clinic assessments. For example, m-IMMS only displays active exemption records rather than all exemption records (active and expired) that are linked to the client record.
Dynamic calculation for age	m-IMMS calculates the client's age based on today's date. The dynamic calculation allows the app to accurate display the age of a client who was born on a leap day. In Panorama, age is calculated by calendar year not in days.
Since Last Dose column	Shows the interval period between the previous dose and last dose for a multi-dose vaccine series for the same immunizing agent. This column is useful for PHUs that follow medical directives from the PHU's medical officers of health based on specific intervals.

Number of Required Doses	For multi-day clinics, the number of required doses is dynamically calculated, and based on forecast status. Unlike Panorama, m-IMMS takes into consideration whether a client's forecast changes between clinic dates.
Clinic Dashboard	Shows the upload/download success of each client, the number of clients immunized which agent was administered and the lot#, the service status for the total number of clients.

Format

The fields are described in the order in which they appear in the m-IMMS application, on a screen-by-screen basis. Recommended best practices are included within the respective sections. Note the use of the following icons:

Best Practice Recommendation

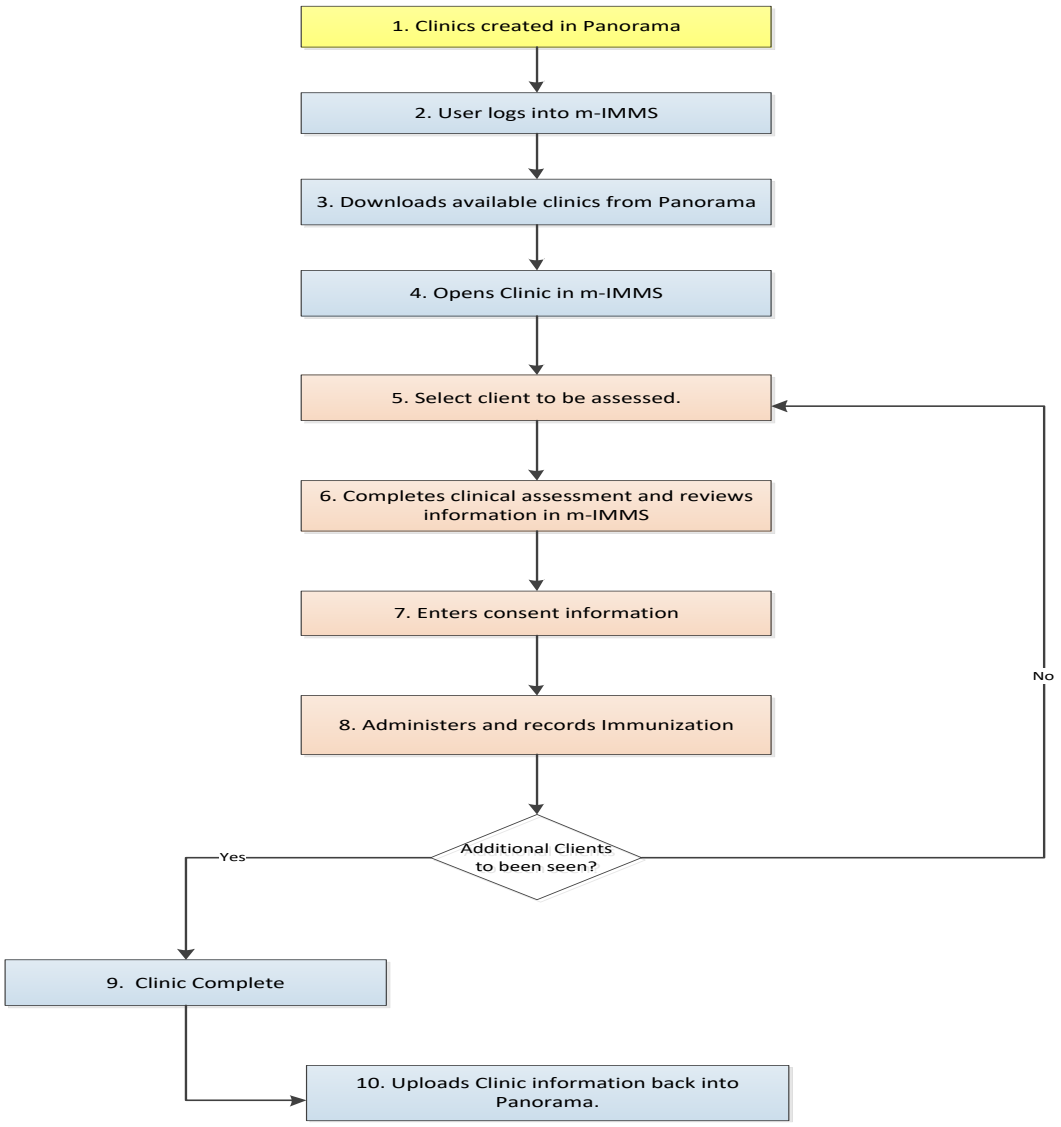
Tips and Tricks

Logged Defects

This document, along with relevant publications and notifications is accessible via the Directory of Networks (DoN).

Section A: m-IMMS Application

The process flow below provides a high level view of the steps required for utilizing the m-IMMS application.



	Panorama
	m-IMMS
	M-IMMS – Client Information Assessment

Registration and Login for m-IMMS

Users Roles and Login Information

Users must meet the following criteria to log into m-IMMS:

- An active Panorama ONEID account, AND
- A provider account linked to the Panorama account (this will be set up in the General Immunization Defaults page in Panorama), AND
- One of the three Panorama roles: Immunization Superuser, Immunization Provider, Immunization Full Clinical AND
- A security token for m-IMMS which is accessed via the Panorama dashboard via the External Reference Links
  Access m-IMMS Security Token
- Touch ID for security and ease of access.

MaaS360

Users also need to register with MaaS360, which is a device management tool that Public Health Solutions I&IT Branch (PHS) users to facilitate the management of iPads registered with the Ministry of Health. Note that MaaS360 is used to provide central control over remotely locking down and tracking iPads and wiping data if required. MaaS360 also enables PHS to push down documents and notifications directly to users.
For the purposes of the LPR, users have already been enrolled through MaaS360. The enrollment process will likely change for future releases of m-IMMS.

Device and Application Timeouts

m-IMMS app:

m-IMMS will timeout after 10 minutes of online (network) inactivity. Online activity is defined as an interaction with the Panorama database: logging in online, retrieve clinics, and uploading data. All of these actions result in an interaction with the Panorama database. If users do not interact with the Panorama database after a 10 minute period, the user is considered to be inactive. When this occurs, the m-IMMS will remain open but if users try to interact with the Panorama database by retrieving a clinic or uploading data, m-IMMS will prompt users to log back online.
There is no session timeout for using m-IMMS. The app will remain open for however long the user keeps it open.

Best Practice Recommendation: Closing m-IMMS application when not in use.

If a user is no longer using the m-IMMS application click on the user icon on at the top right hand corner of the screen and log out.
OR
To close out of the application double click on the home button on your iPAD and swipe the m-IMMS application up.

iPad device:

All iPAD devices should have the timeout set at the maximum 10 minutes as per privacy and policy requirements. After 10 minutes of inactivity with the iPad, the device will lock. Users will need to enter their passcode/Touch ID to unlock the device.

Setting the iPad timeout to 10 minutes:

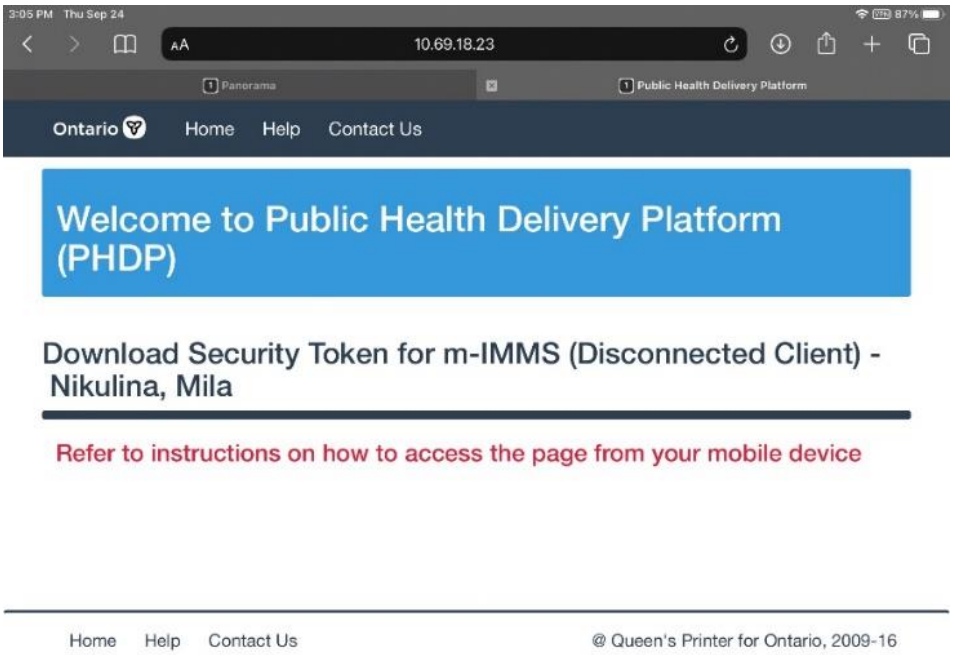
- Select the iPAD settings icon ( )
- Select the General icon ( )
- Select Auto-Lock
- Select 10 minutes

Creating a TouchID:

- Select the iPAD settings icon ( )
- Select the Touch ID & Passcode icon ( )
- Enter passcode
- Select Add a Fingerprint…
- Follow the steps until complete

NEW iOS 14 and default settings – To be able to Download Security Token

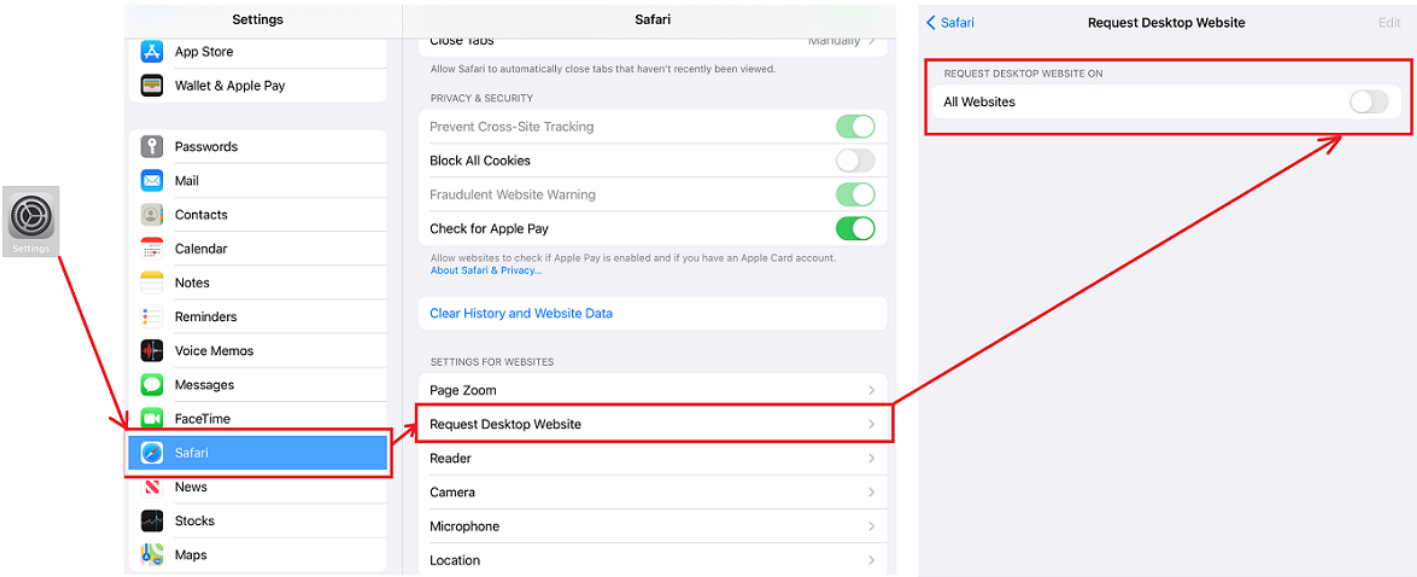
t



The release of iOS 14 has changed some of the default settings of the Safari browser on iPads. One of which is requesting a desktop version for all webpages, which makes the token download button disappeared from the Home page, as showed in the above screenshot. iPad users on iOS 14 trying to download a Security Token for the m-IMMS application would need to perform **addition steps below if they do not see the "Get m-IMMS Access Token" button on the Home page (showed above).**

1. On iPad home screen, go to iPad settings.
2. In the left menu, scroll down and tap Safari.
3. In the right menu, scroll down and tap the “Request Desktop Website” setting.
4. Disable the “All Websites” option by turning the toggle grey.
5. Go back to Safari and refresh the home page. The “Get m-IMMS Access Token” button should be there now.

You only need to perform these steps once and don’t need to do so every time when downloading token.



NEW How to Generate a Security Token for m-IMMS

1. Enter in the passcode for the iPAD or Touch ID - Scan Fingerprint.

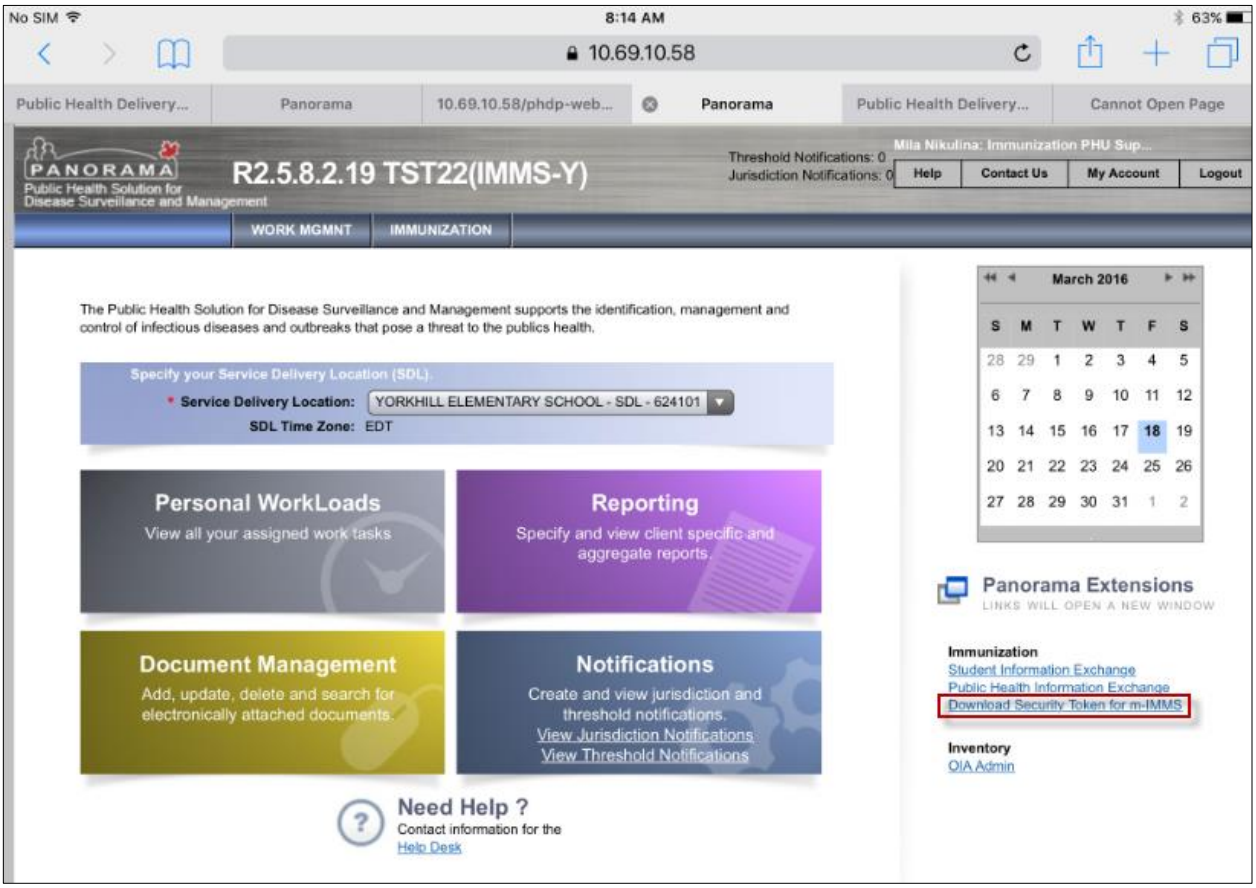
2. Open m-IMMS application. Message **Unable to access m-IMMS**. You will be redirected to Panorama to generate security token. In order to generate token select link **Download Security Token for m-IMMS**.

3. Select link **Get Token**.

4. Safari browser opens to Panorama login.

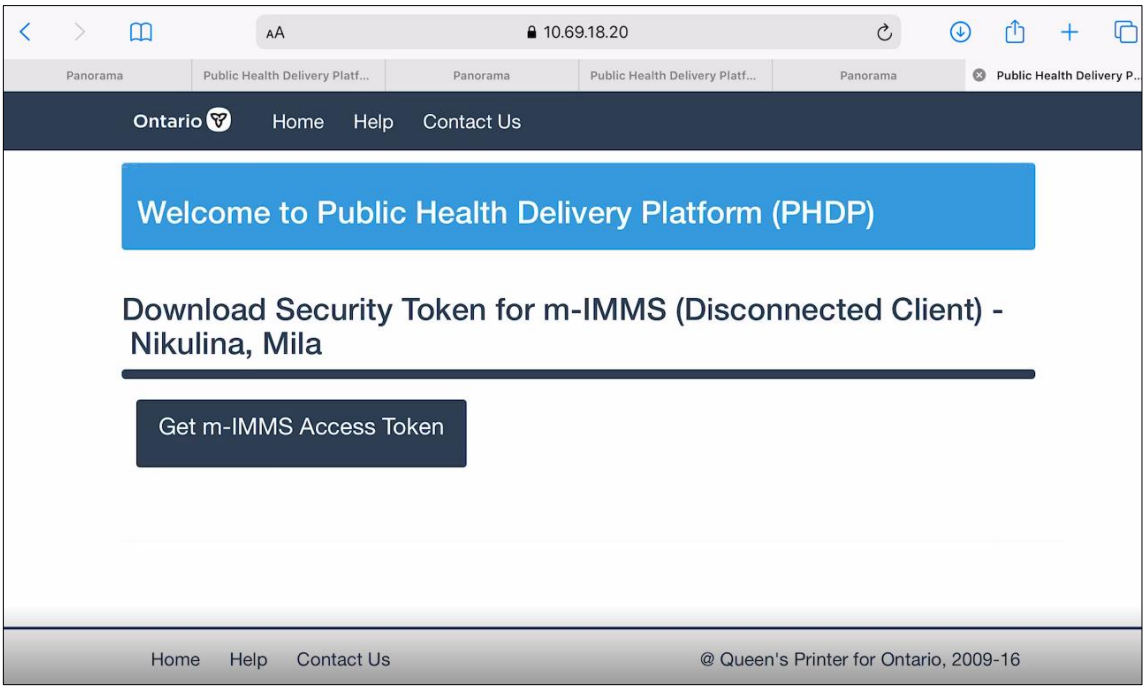
5. Enter Panorama username and password.

6. Select the link **Download Security Token for m-IMMS** (External Reference Links - Located on the Right hand side of the Panorama Dashboard under the calendar).

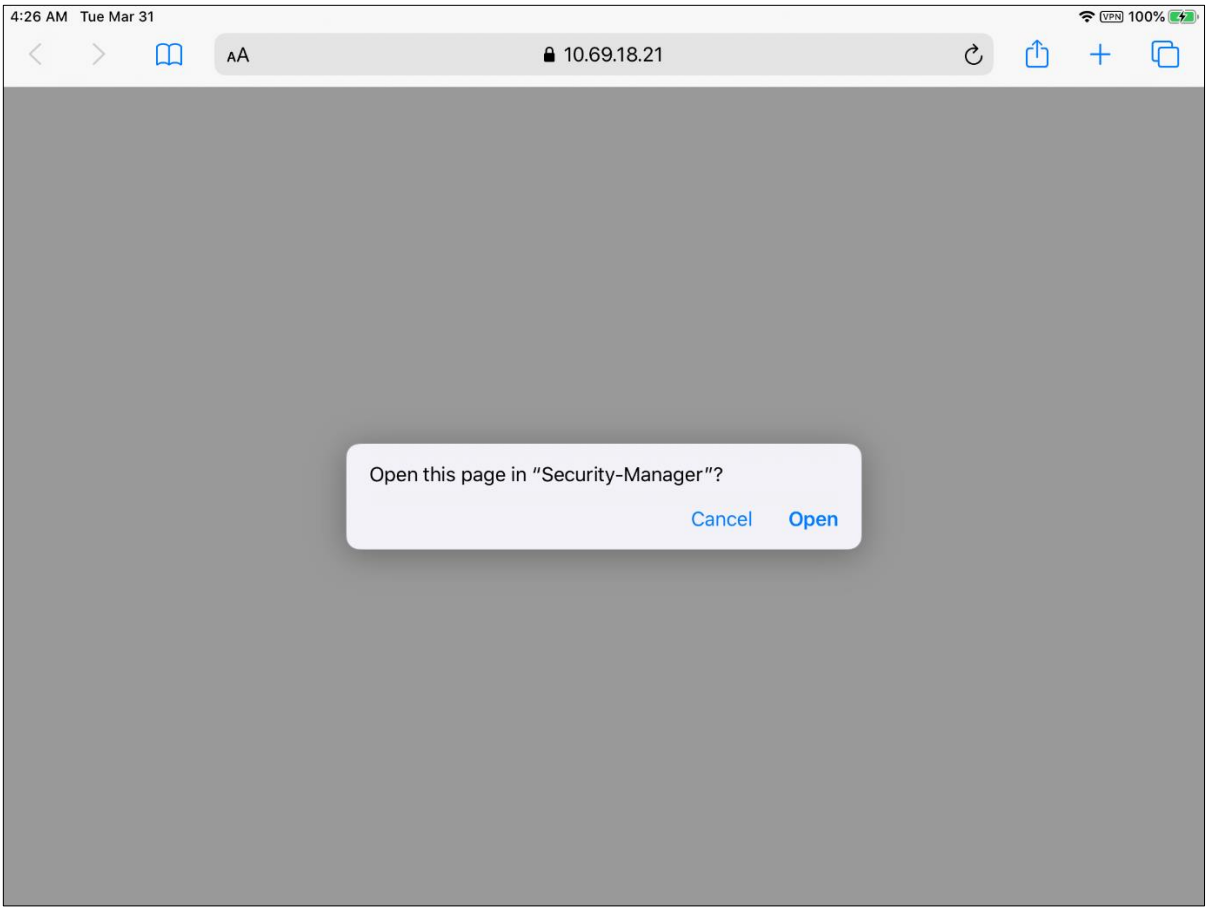


7. Once link is selected the below screen will appear.

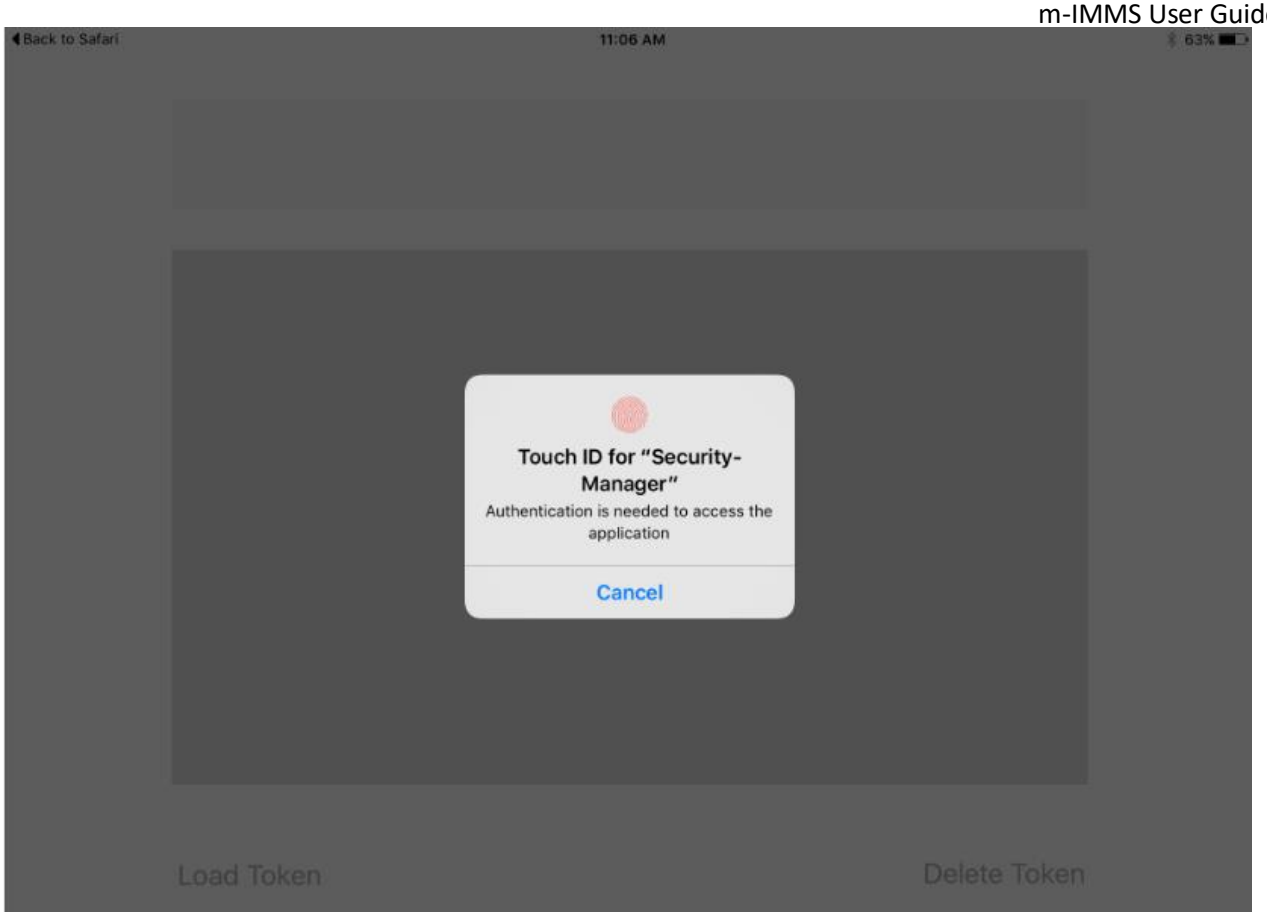
8. Select button **Get m-IMMS Access Token.**



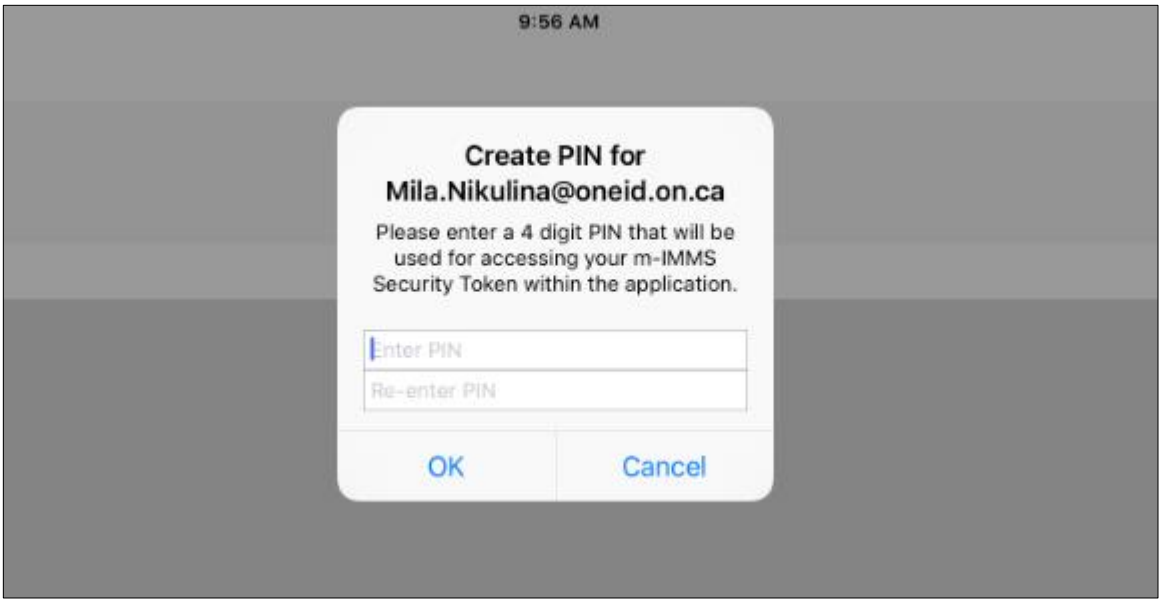
9. Click **Open** on the pop-up window **Open this page in Security-Manager ?**



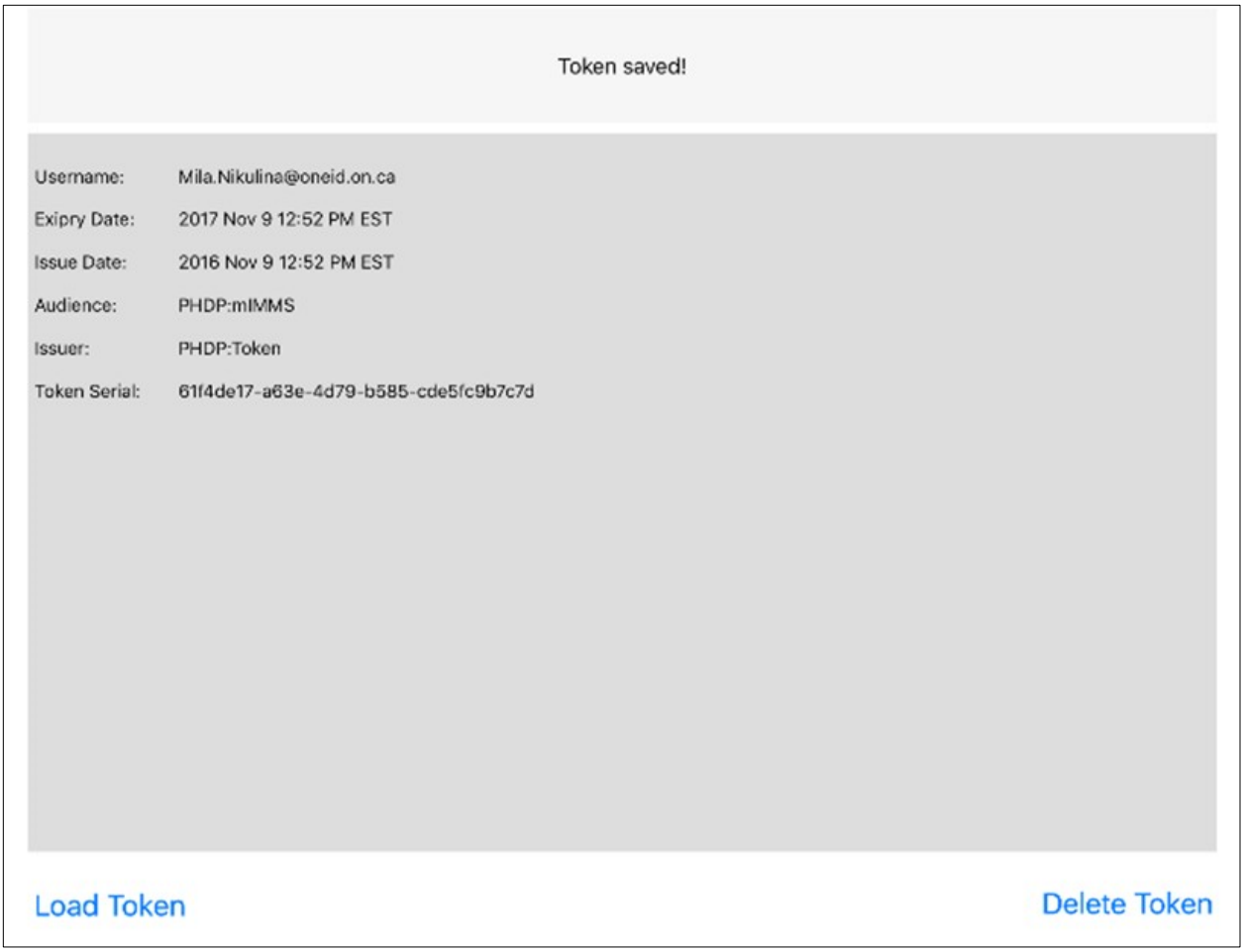
10. Authentication required to access - Touch ID



11. Enter in a 4 digit PIN that will be used for accessing your m-IMMS security token within the application.


9:56 AM
Create PIN for
Mila.Nikulina@oneid.on.ca
Please enter a 4 digit PIN that will be used for accessing your m-IMMS Security Token within the application.
Enter PIN
Re-enter PIN
OK
Cancel

12. Once the PIN is entered and OK is selected a message **Token Saved** will appear and the token information will be displayed.



Token Expiry

The security token will expire 1 year form the date that it was created.

Warning messages:

A message will notify the user 14 days prior to the token expiring and will present the user a link to return to Panorama to generate a new token.

If a new token has not been generated 14 days after the token has expired the system will automatically delete the expired token. Once the user tries to open the m-IMMS application a message **No token found** will appear. User must select the **Get Token** option to be able to access m-IMMS.

****Note**

Access to m-IMMS is via your iPAD only. Your iPad password or Touch ID will allow you to open m-IMMS directly. It is important not to share your password with anyone as this is the only authentication that is required to access m-IMMS.

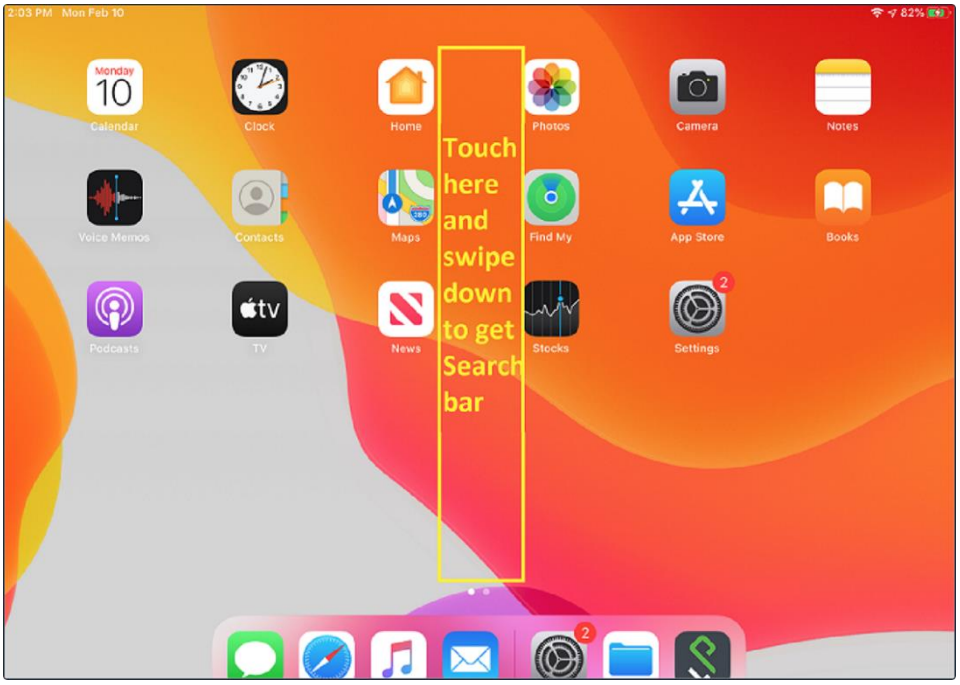
Best Practice Recommendation: Clear downloaded file once token is created

After users have finished the process of getting a token, ensure that you have pressed the clear on your downloads to ensure that the that the token is has been removed from your download list. See screen below.

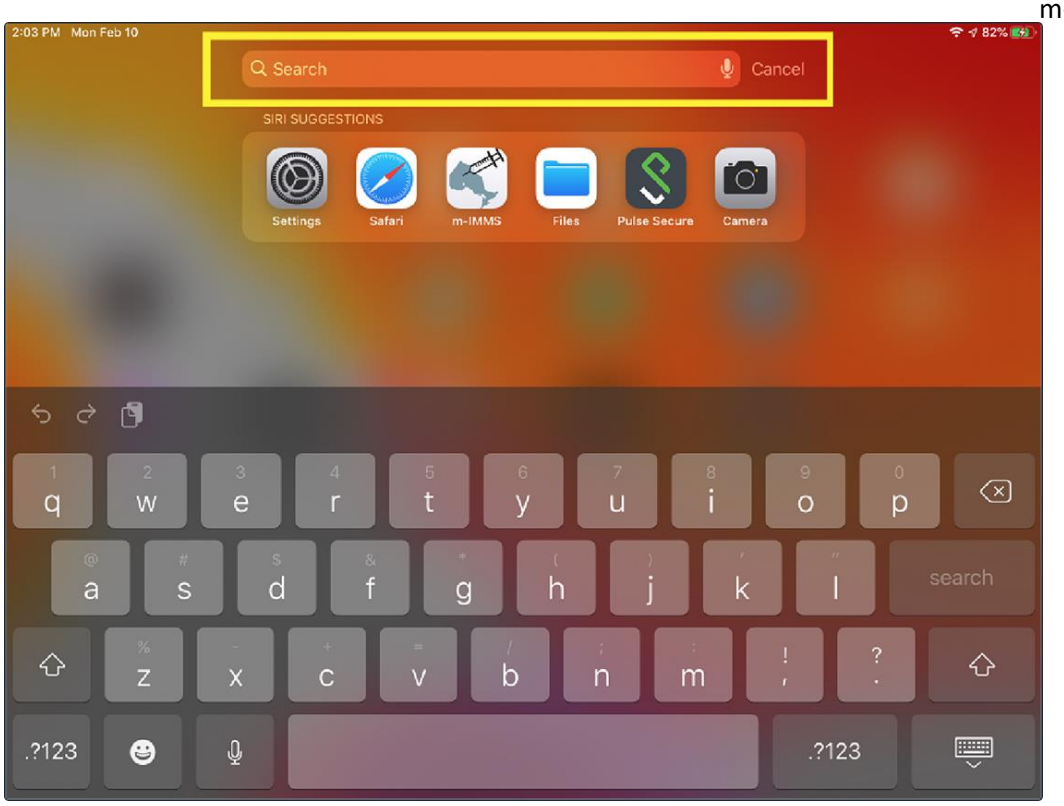
How to Delete Token from iPAD

1. By default, the token is saved to the iPad **Download** folder. To see this folder, open **Files** application by swipe down from the middle of the home screen to bring up the

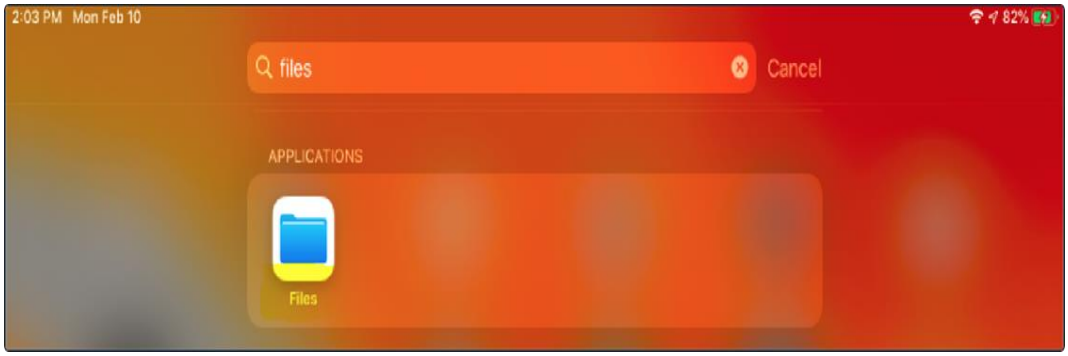
Search bar, as showed below.



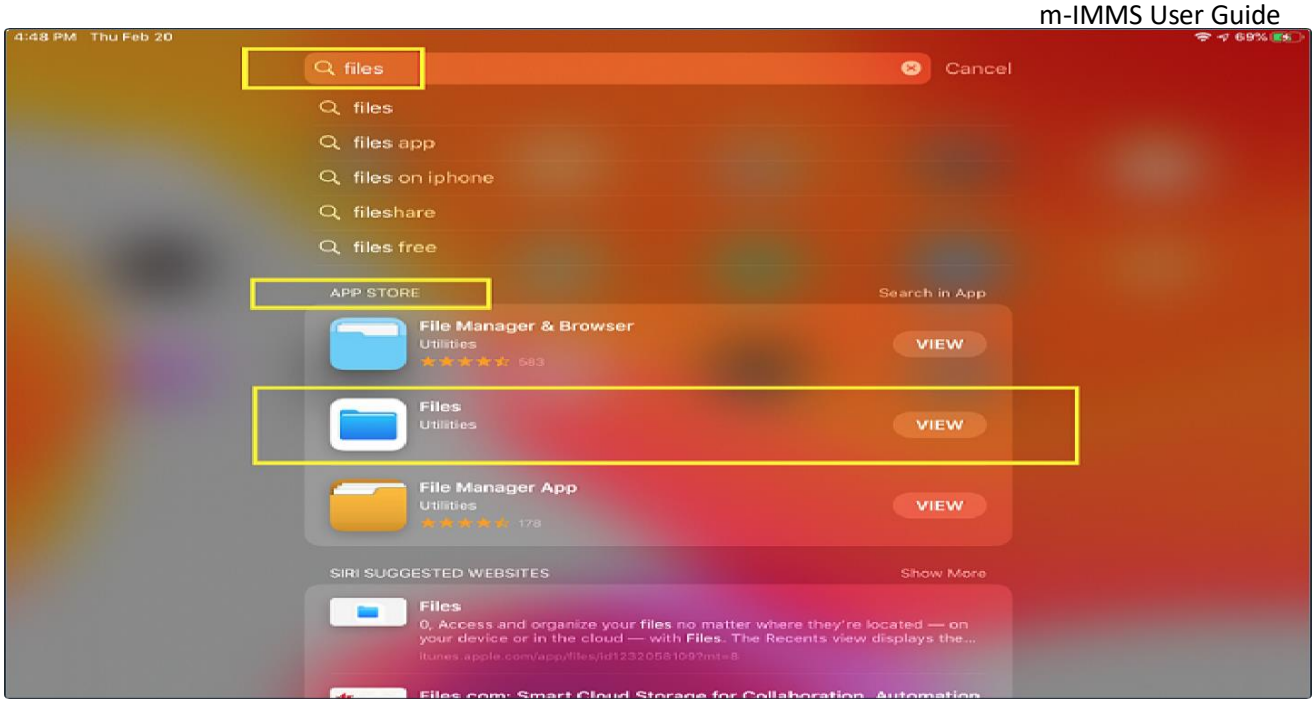
2. **Search** bar is shown. Enter **Files**



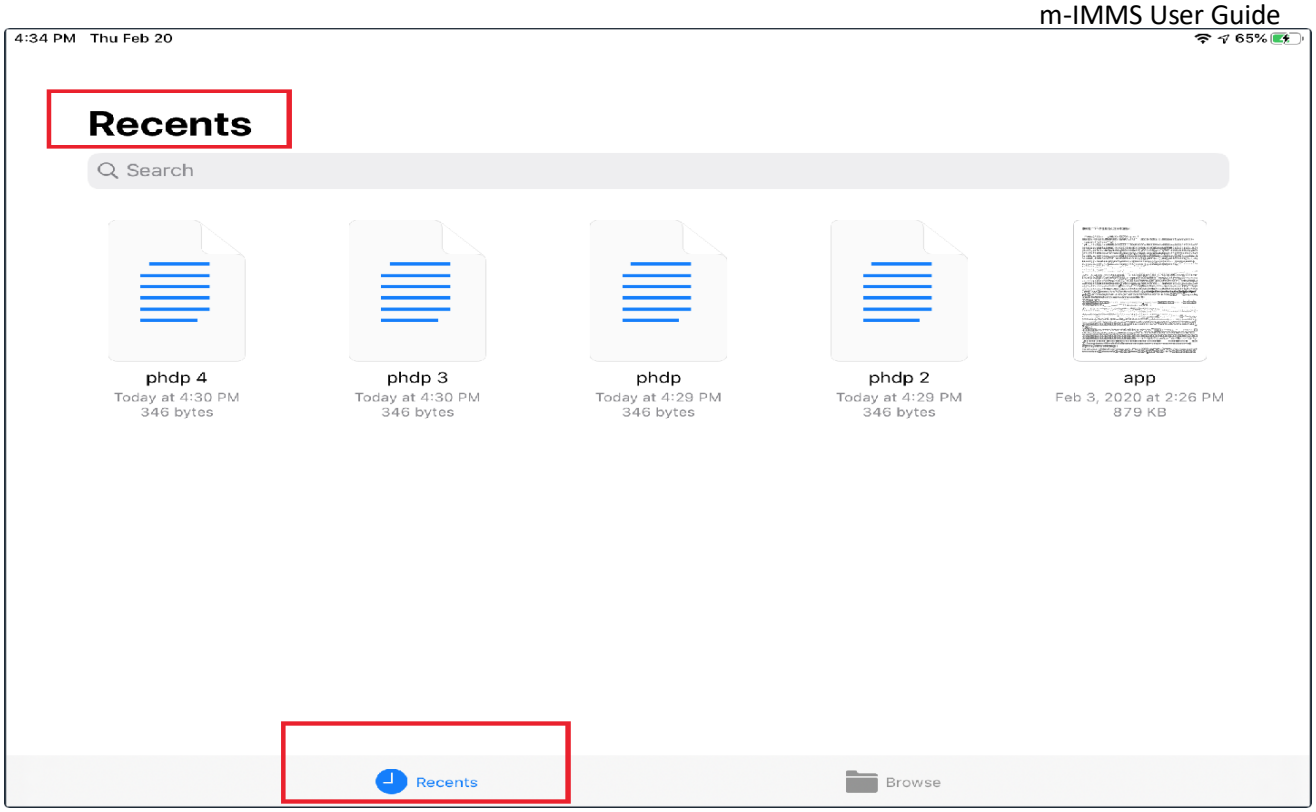
3a. The **Files** application shows as below under the **APPLICATIONS** section. Tap to open.



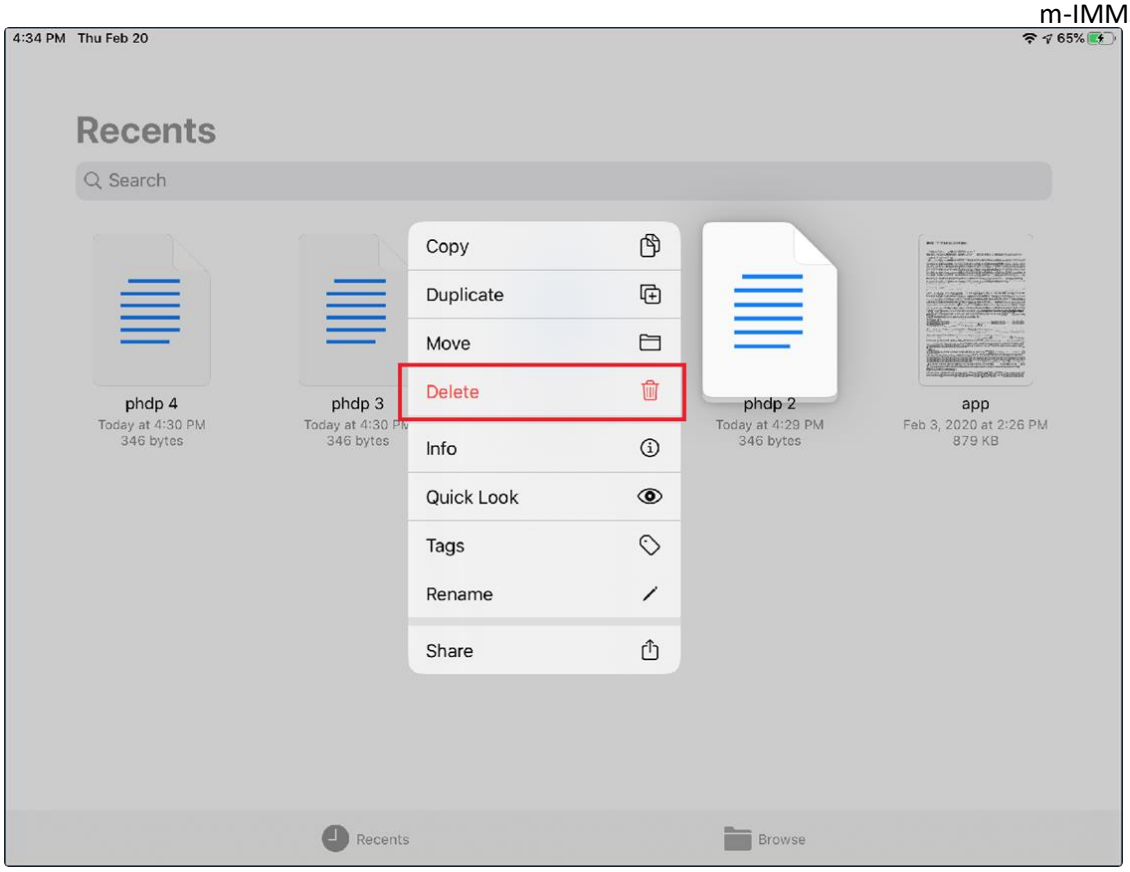
3b. If not installed on your iPad, it can be found in the **APP STORE** section. Tap and install **Files** application to your iPad. This needs WIFI connection to the Internet.



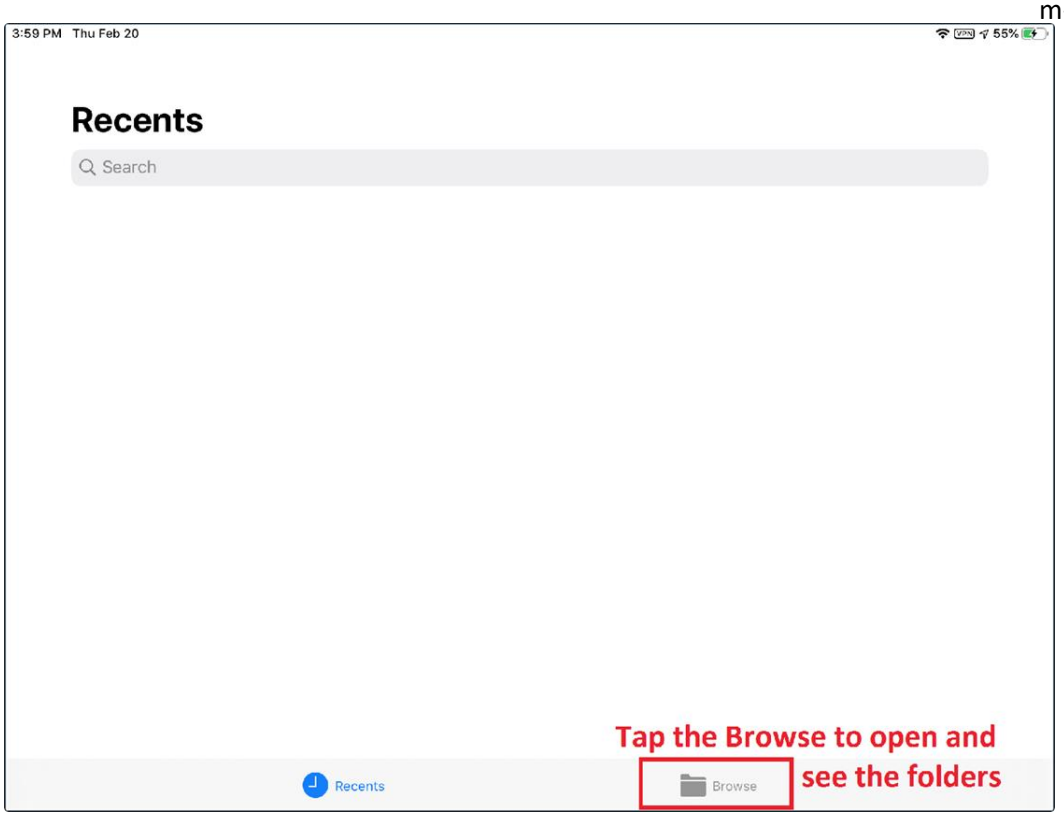
4. After the **File** application is launched, under **Recents** screen and there may be one or more tokens.



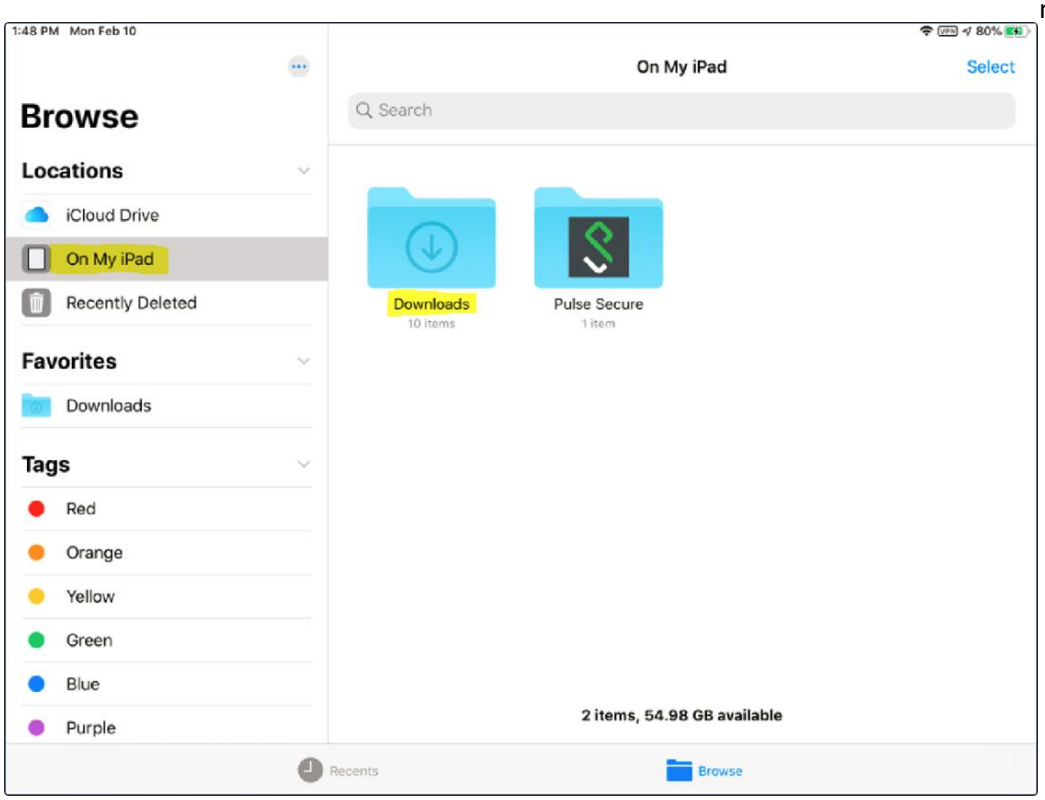
5. Tap the token and hold until the small menu window shows. Tap **Delete** to delete the selected token. Please delete all the tokens displayed in **Recents** screen.



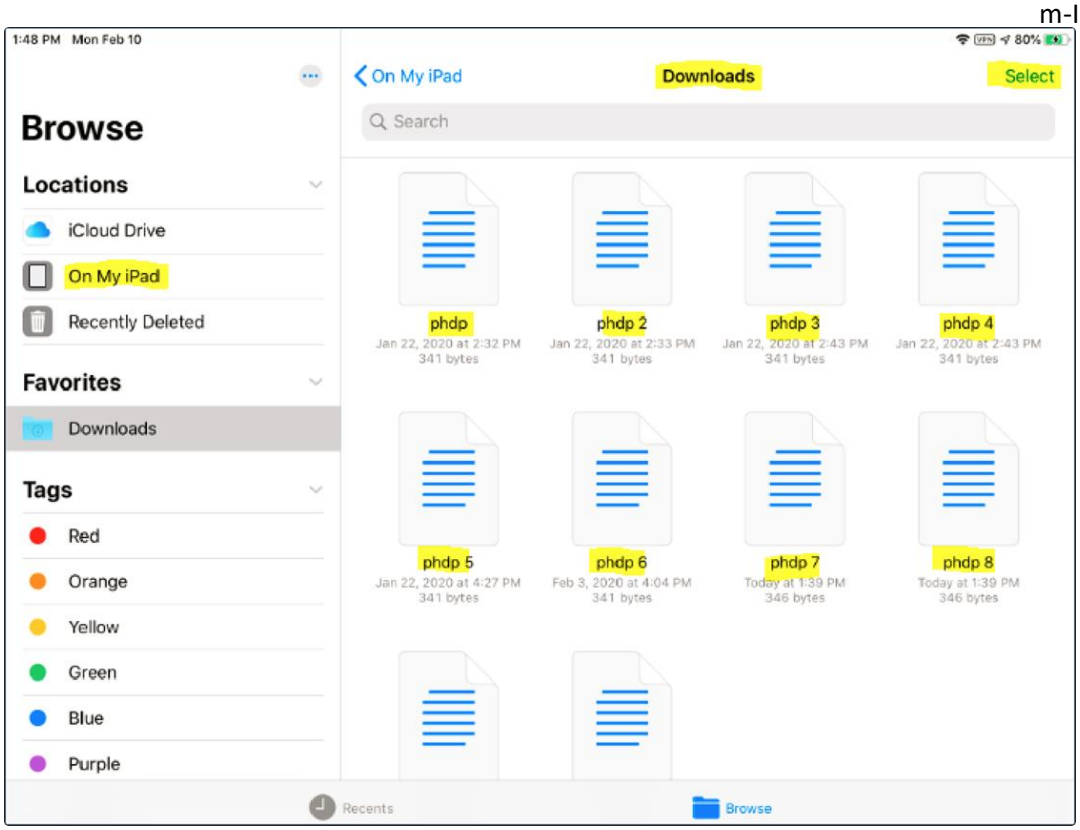
6. The **Recents** screen should have no token displayed. Then tap the **Browser** button at the right bottom to open and see the folders, to check if there are any more tokens in the **Downloads** folder.



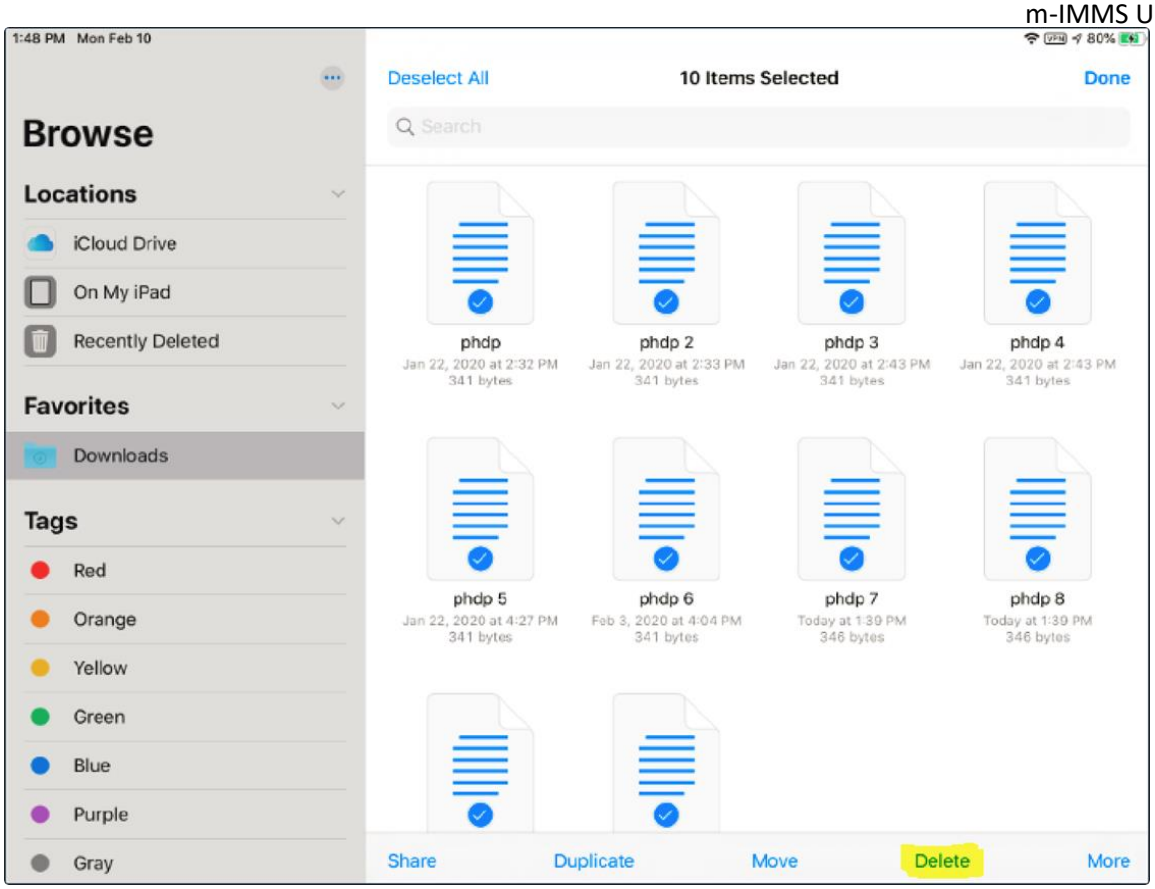
7. All the tokens are by default saved in the **On My iPad** -> **Downloads** folder. In the below example screenshot the **Downloads** folder contains 10 items. Tap to open the **Downloads** folder. Note: if no token displayed in **Downloads** folder, then go to step 13 below to find out where downloaded items are saved. Also check every folder in **On My iPad** or in **iCloud Drive**, to ensure tokens have been delete for security purpose.



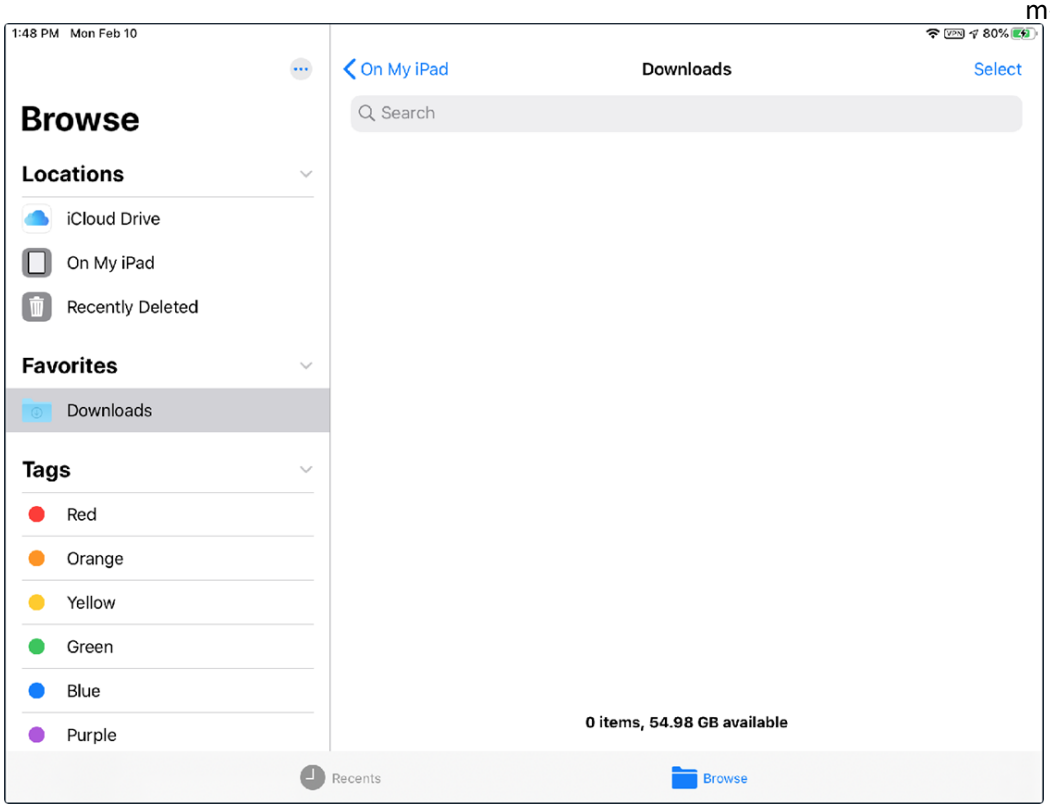
8. To delete all the tokens, tap the **Select** button on the top right.



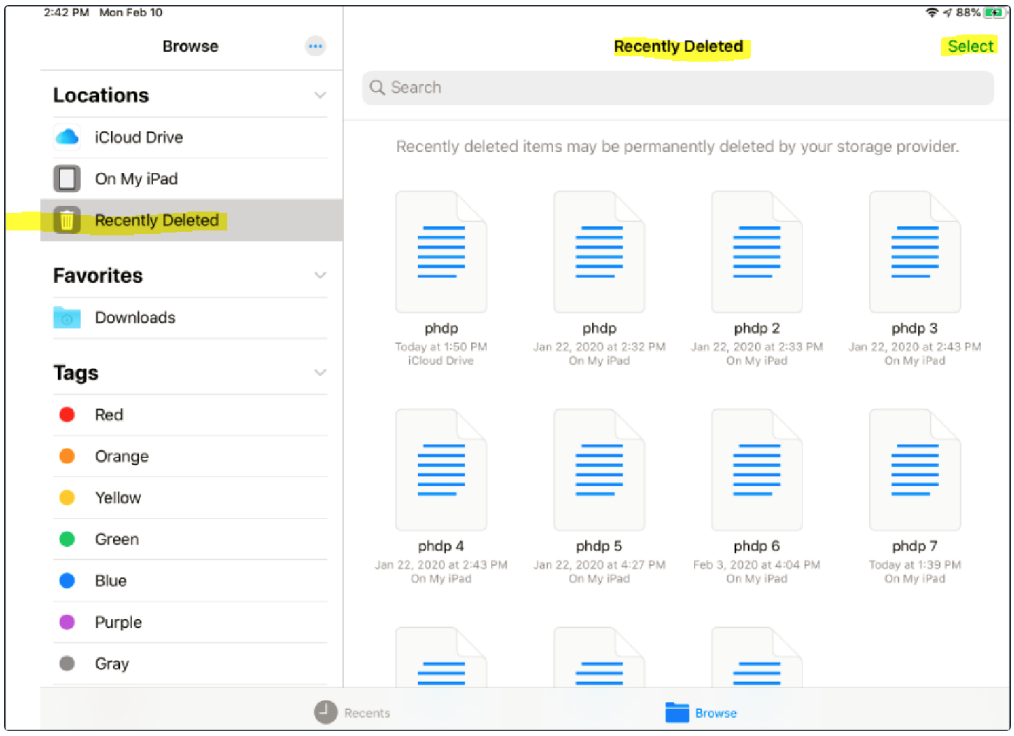
9. Tap the token to select. After all the tokens are selected as below, tap the **Delete** button below to delete all the 10 tokens.



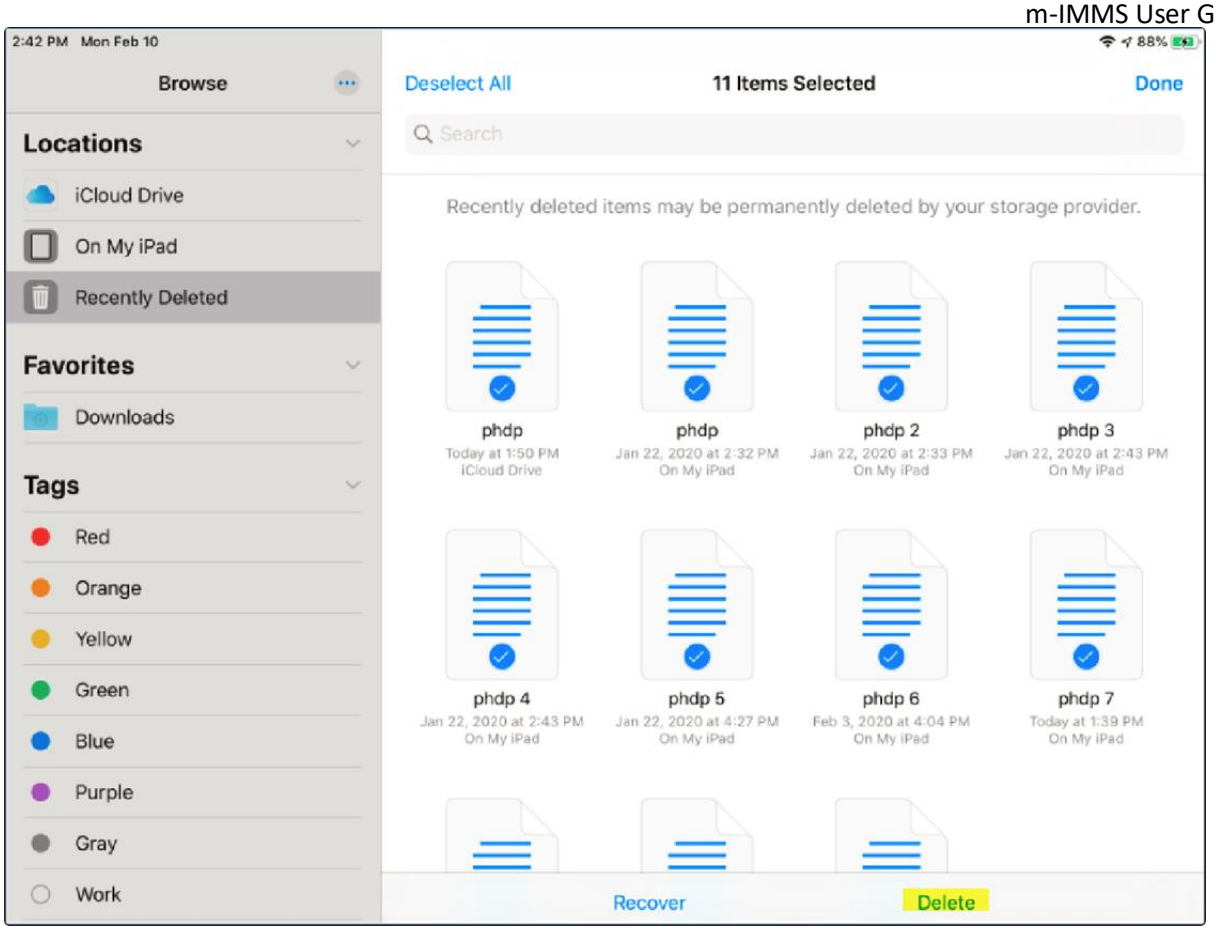
10. All tokens are deleted.



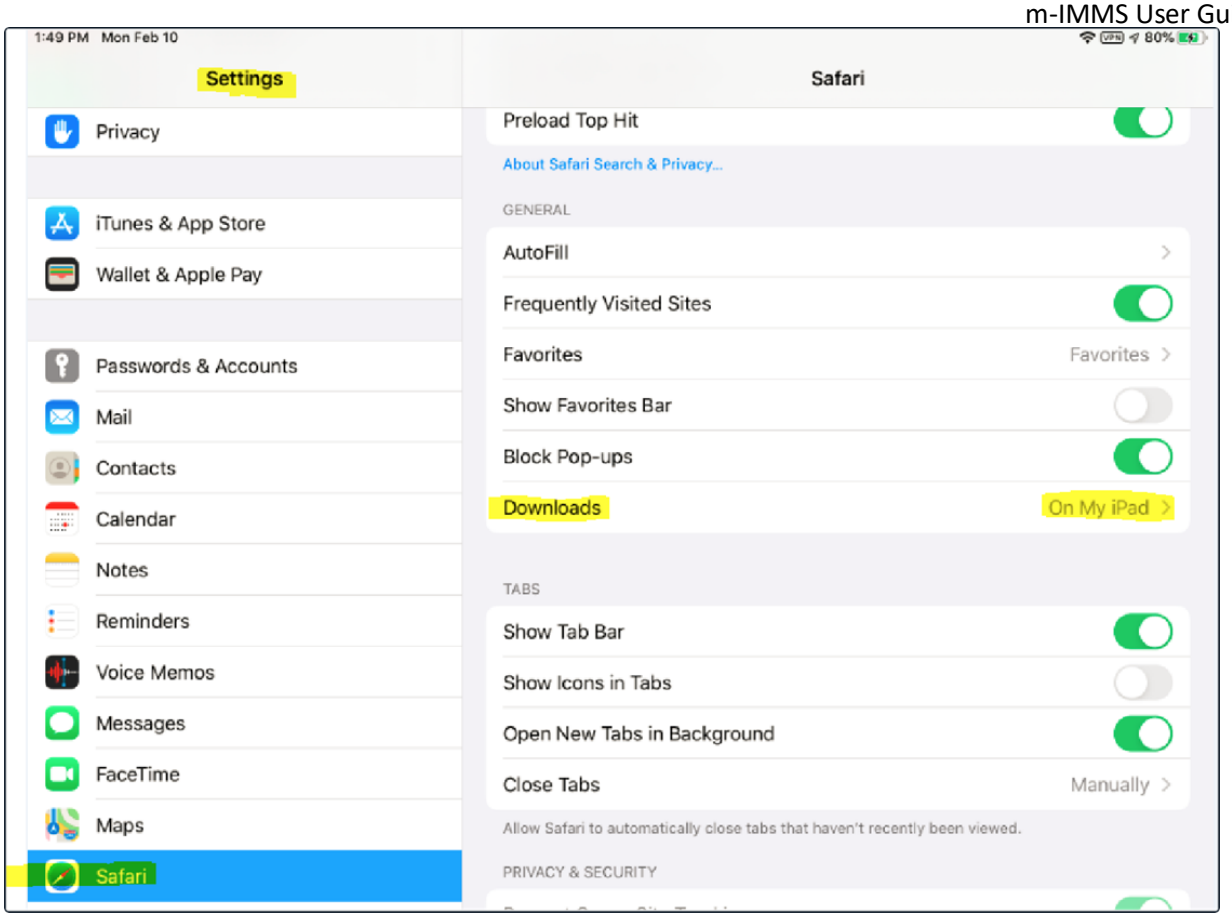
11. Tap **Recently Deleted** on the left menu list and tap **Select** on the top right.



12. Select all the tokens by tapping. Then tap **Delete**, bottom right. All tokens selected will be deleted completely from the iPad.



13. If you do not find the tokens in **On My iPad** -> **Downloads** folder in the **File** application, then go to iPad **Settings** -> (swipe down to)**Safari** -> **Downloads**, as showed below, to find out which folder the iPad is using to save the downloaded files. Go to that folder in **Files** application to delete all tokens. Then follow from Step 13 and 14 to delete all tokens from **Recent Deleted**.



Token Expiry
The security token will expire 1 year form the date that it was created.
Warning messages:
A message will notify user 14 days prior to the token expiring and will present the user a link to return to Panorama to generate a new token.
If a new token has not been generated 14 days after the token has expired the system will automatically delete the expired token. Once the user tries to open the m-IMMS application a message 'No token found' will appear. User must select the 'Get Token' option to be able to access m-IMMS.
Access to m-IMMS is via your iPAD only. Your iPad password or Touch ID will allow you to open m-IMMS directly. The user must also use the PIN that they created to access m-IMMS. It is important not to share your password with anyone as this is the only authentication that is required to access m-IMMS.

Best Practice Recommendation: First time using m-IMMS

All users prior to using m-IMMS for the first time should ensure that they are able to log into the m-IMMS application and download a clinic. Once the clinic has been downloaded open the clinic and ensure that the list of clients appears.

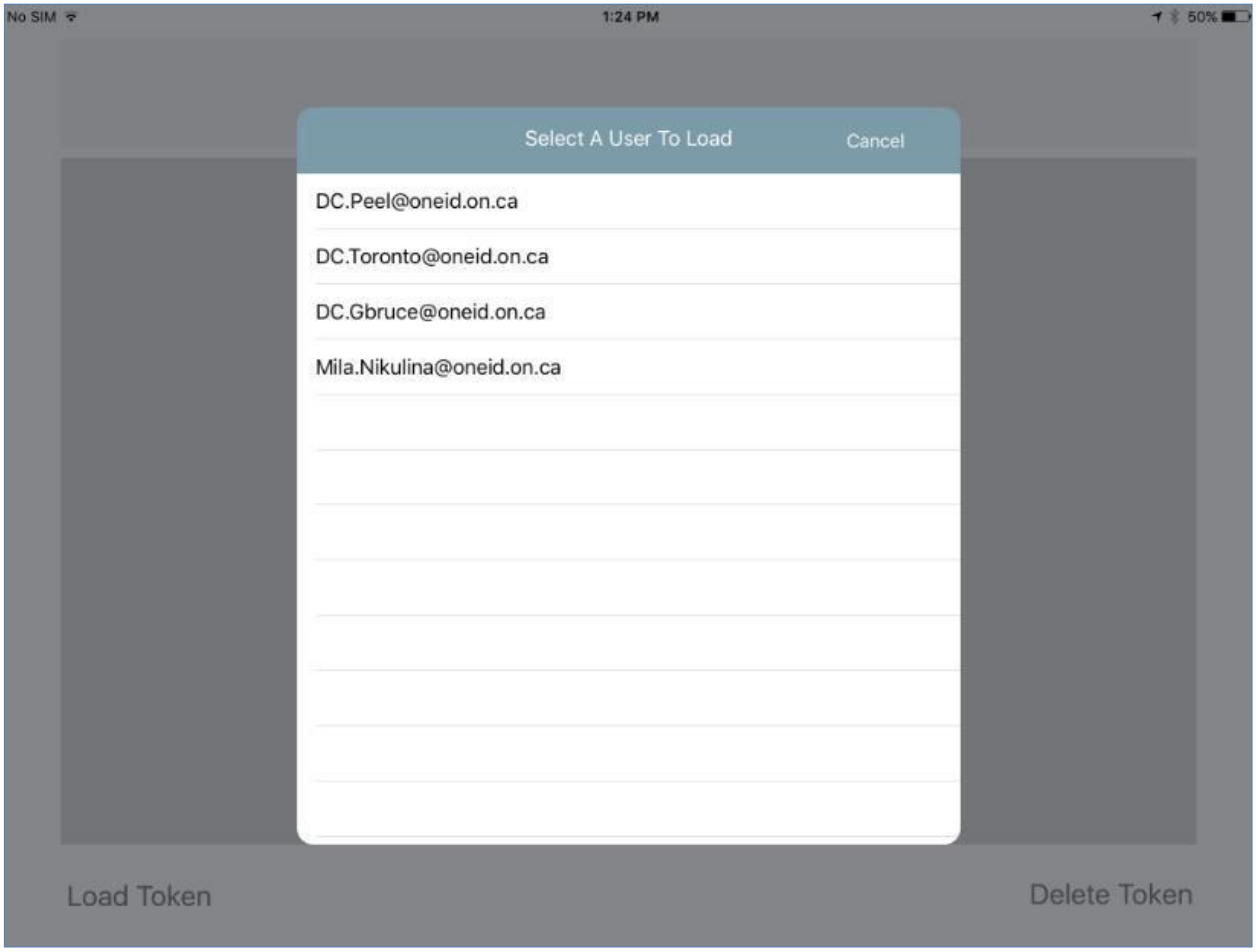
Multiple Users per iPad

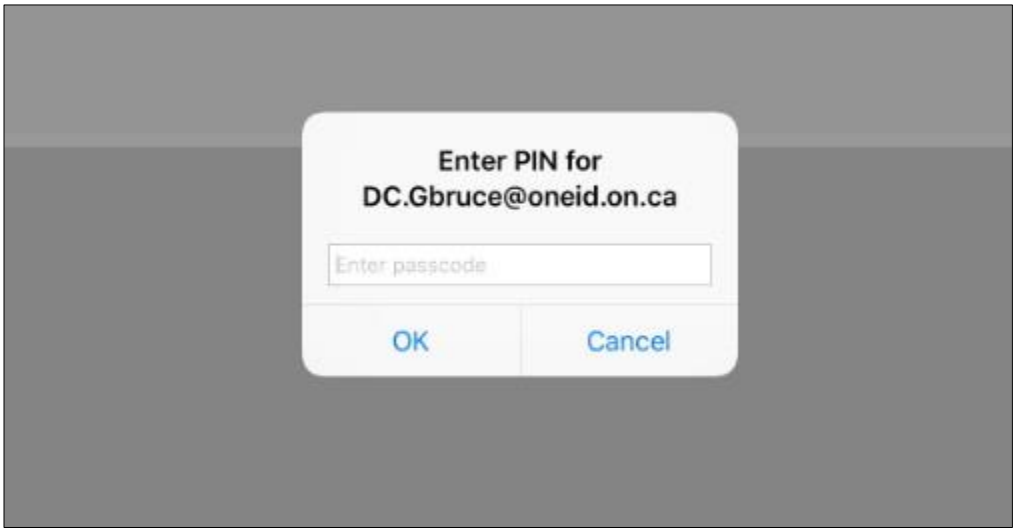
Multiple security tokens can be generated and stored on the device. Users will have to select the correct m-IMMS users prior to login into m-IMMS.

The following updates have been made to m-IMM to support multiple users

Security Manager

- All users who are authenticated on a particular iPad will be listed in Security Manager;
  - By selecting “Load Token” a model entitled “Select User” will appear
  - Tap on user name to select desired user
  - PIN will be required to further authenticate user


No SIM
1:24 PM
50%
Select A User To Load
Cancel
DC.Peel@oneid.on.ca
DC.Toronto@oneid.on.ca
DC.Gbruce@oneid.on.ca
Mila.Nikulina@oneid.on.ca
Load Token
Delete Token



m-IMMS Application

User Pick List

- All authenticated users will be presented in a pick list in m-IMMS
- Users must select their name
- Users must enter their m-IMMS 4 digit PIN
- If users are not shown in the select users pick-list, they can select the “Add User” link which will direct the user to the Panorama login screen to create a new token for this user

Touch ID Model

- The selected users name will now appear in the “Touch ID” model
- User must use “Touch ID” functionality to authenticate themselves

Touch ID Model – Whenever m-IMMS requests a user to authenticate themselves by using Touch ID, the users ONEID information will appear in the model

Missing Tablets

What to do if your tablet is missing:

1. If the device is missing, the end user should report immediately to their PRC or perform the following steps themselves if their PRC is not available.
2. The PRC/end user should inform the Panorama Service Desk at 1-866-272-2794 or panoramasupport@ontario.ca.
3. The Panorama Service Desk will open a service ticket.
4. If the PRC/end user is certain that the iPad was stolen or taken from the end user against their will (i.e. by force), then proceed to step 9.
5. If the PRC/end user is unsure of why the iPad is missing, the Panorama Service Desk will complete the following steps:

- Step 1 – Lock the iPad via MaaS360
- Step 2 – Try to locate the iPad via MaaS360
- Step 3 – Try to send a "Buzz" signal to the device and add a message in the "Buzz" to contact the Panorama Service Desk.

6. If the iPad is found, the PRC/end user will contact the Panorama Service Desk to unlock the device.
7. The Panorama Service Desk will unlock the device and close the service ticket. No further action is required.
8. If the device is not found by the end of the following business day, proceed to the next step. **Note - The PRC or designate will be able to ask for a complete wipe at any time.
9. The PRC or designate will complete the following form to instruct the Panorama Service Desk to perform a "Complete Wipe" of the iPad.
    a. A "Complete Wipe" will remove all information from the iPad, m-IMMS, photos, any other application that is on that iPad.

****Immunization data that was not uploaded prior to the device wiped will be lost. ****

10. The Panorama Service Desk will perform a "Complete Wipe" of the iPad and close the service ticket.

Best Practice Recommendation: Closing Safari Browser and Pages Once Token Created

Once the security token has been saved make sure to log out of Panorama and close the Safari browser page by clicking on the (x).

Best Practice Recommendation: Log Out of m-IMMS when not in use

***Always* log out of the application if not in use.** Users can log out of m-IMMS via the person icon and selecting log out or by double clicking the home button and swiping the m-IMMS application up.

m-IMMS Functionality Overview

The following section provides details on current m-IMMS functionality as it fits within typical PHU workflow at a clinic (school based or booked). The information below corresponds to the features that users will see in our limited production release.

Roles –Functionality 3.1

m-IMMS now supports both Clinical and Admin/Clerical Roles

All m-IMMS users must have the following:

- An active Panorama ONEID account

Clinical – Nursing

- All clinical/nursing accounts must be linked to the Panorama account (this will be set up in the General Immunization Defaults page in Panorama)
- Must have one of the two clinical Panorama roles: Immunization Provider, Immunization Full Clinical
- All clinicians will have full m-IMMS functionality and Navigation

- All documentation completed in a client's record by a clinician will become a part of the clinical notes sections in m-IMMS. Example if a nurse creates a note when create a precaution under alerts this will become a part of the clinical note section of the client record. The precaution comment will be populated with see clinical notes and the date for further details.

Admin/Clerical Role –3.1 Functionality

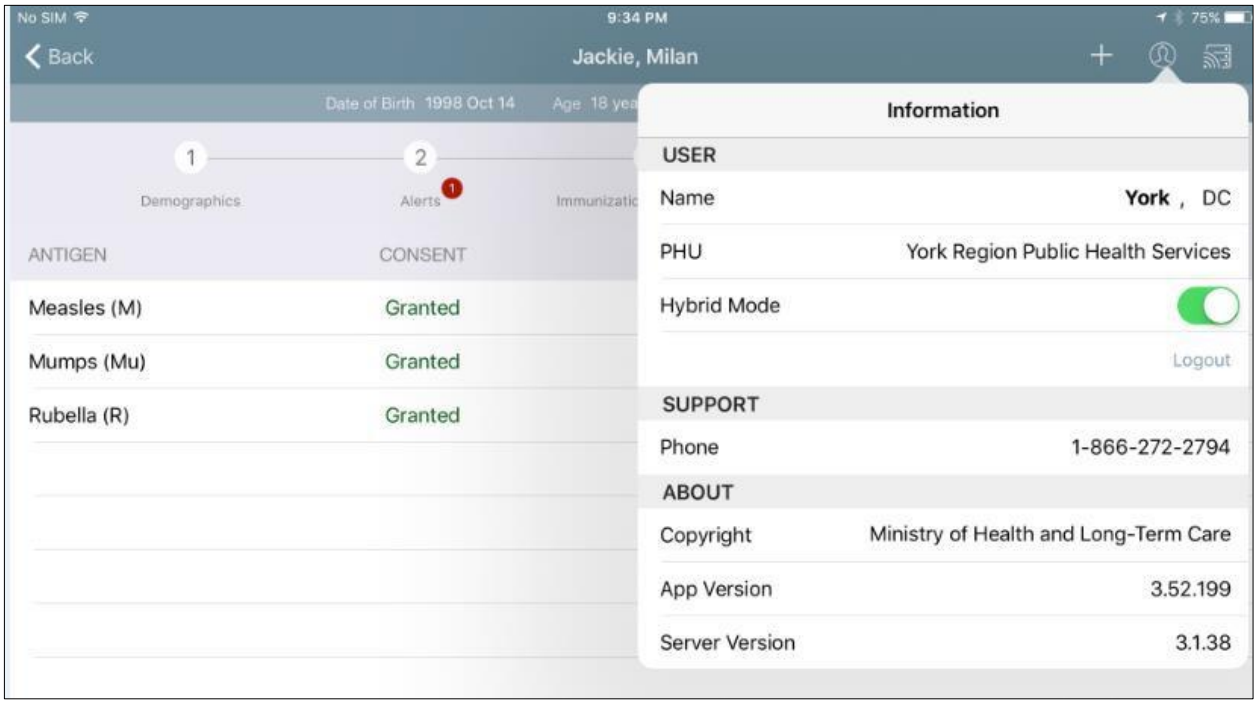
- Must have either the one of the two Administrative Panorama roles: Immunization Administrative, Immunization Full Administrative
- Admin/Clerical users will have partial m-IMMS functionality and navigation – Administer Immunizations will not be displayed (Nursing function only) .

- All documentation completed in a client's record by a admin/clerical will become a part of the communication event logs section in m-IMMS located within the notes section. Example if a admin/clerical user creates a note when adding an exemption under alerts this will become a part of the client communication event logs in client record. The comment will be populated with see communication event log and the date for further details.
- See Communication Event Logs for further information.

Hybrid Mode – 3.1 Functionality Optional

Hybrid mode is an optional functionality that was added to m-IMMS and allows information to be uploaded automatically to Panorama if the iPad is connected to wifi.

Select the person icon ( ) and turn the hybrid by swiping the toggle to the right.



Best Practice – Upload Clinic to Panorama Upon Completion of the Clinic

Users should upload information back up to Panorama at the end of the clinic regardless if they are using hybrid mode or not to ensure all data has been updated.

Clinics

Pre-Clinic

Users must create a Mass Imms Event in Panorama production in order to download the clinic to the iPad. Users can only retrieve clinics that are associated to the user's PHU, are active (have an Open status), and have clinic date(s) that are today or in the future.

Users must also have internet connectivity in order to retrieve the clinic list. Users can only select one clinic to download at a time. Users should download all relevant clinics to m-IMMS prior to the clinic day but as close to the clinic day as possible.

Best Practice Recommendation: Scheduling Forecast to Run

Users should follow the established best practices when scheduling forecast to run for clinics. Please refer to the Best Practice Recommendations –Scheduling Forecaster section in the Panorama Data Standards and Best Practices document available on the Knowledge Base.

Update Provider Information

Providers who are at the clinic do not need to be included in the clinic provider list prior to downloading the clinic. Providers will automatically be updated in the provider list once data has been entered by the provider.

Downloading Clinics

Users must select clinics they would like to download from Panorama. In order to do this select the ( ) icon located at the top right hand corner of the application.

Best Practice Recommendation: Downloading Clinics

PHUs should download the clinic to at least *one* iPad as close to the clinic day as possible. This ensures that the clinic has the most up-to-date information, including the scheduled forecast. Ideally, PHUs should download the clinic(s) to the device when they are sure that they have collected all the data.

Sharing Downloaded Clinics

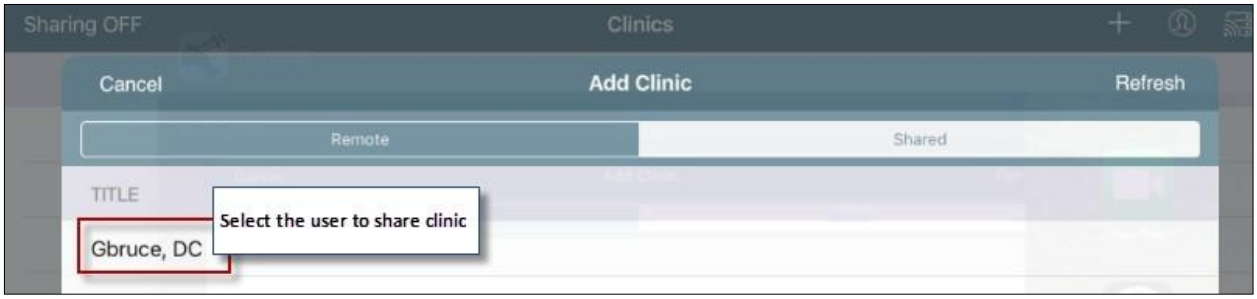
If the users at the clinic did not have an opportunity to download clinics prior to the clinic day they can now access a clinic from another iPad. Sharing of clinics can be done via WiFi/3G-4G/Bluetooth. In order for m-IMMS users to share clinics they must be from the same Public Health Unit, both have the m-IMMS application on their iPad and be within 30 feet of each other.

Bluetooth

If unable to access WiFi/3G-4G and Bluetooth is required to share a clinic ensure that Bluetooth is enabled by swiping up from the bottom of the iPad and selecting the ( ) icon.

User Sharing

1. By tapping on the Sharing icon users can turn the sharing function Off or On
2. A new toggle under the shareable column on the clinic page will determine which clinics can be shared.
3. User would need to select the users iPAD in which they would like to access in order to share a specific or number of clinics. User name would appear for example Jane.Doe@oneid.on.ca



4. Once sharing has been activated the user who would like to access an iPad will be required to enter a 4 digit PIN that will be required to be entered by the user who's iPad they are wanting to share clinics with.

5. Clinic can now be shared.

User who has the clinic(s)

1. Select the (+) icon to download clinic
2. Switch Clinic list from 'Remote' to 'Share'

3. Select the clinic you would like to access
4. Enter in the 4 digit PIN that was created in order to share clinic

5. Clinic will begin downloading. Wait until clinic has been downloaded before opening.

Best Practice Recommendation: Sharing Clinics

PHUs should download the clinic to at least *one* iPad as close to the clinic day as possible. This ensures that the clinic has the most up-to-date information, including the scheduled forecast. Ideally, PHUs should download the clinic(s) to the device when they are sure that they have collected all the data.

Best Practice Recommendation: Beginning

Clinics should be shared before any data is entered into m-IMMS. If a clinic is shared after data has been entered the data that was entered will also be shared. The clinic dashboard will represent the data at the time the clinic was shared and capture all the new data from the user who the clinic was shared with. This could result in discrepancies' when trying to close the clinic.

Uploading Shared Clinics

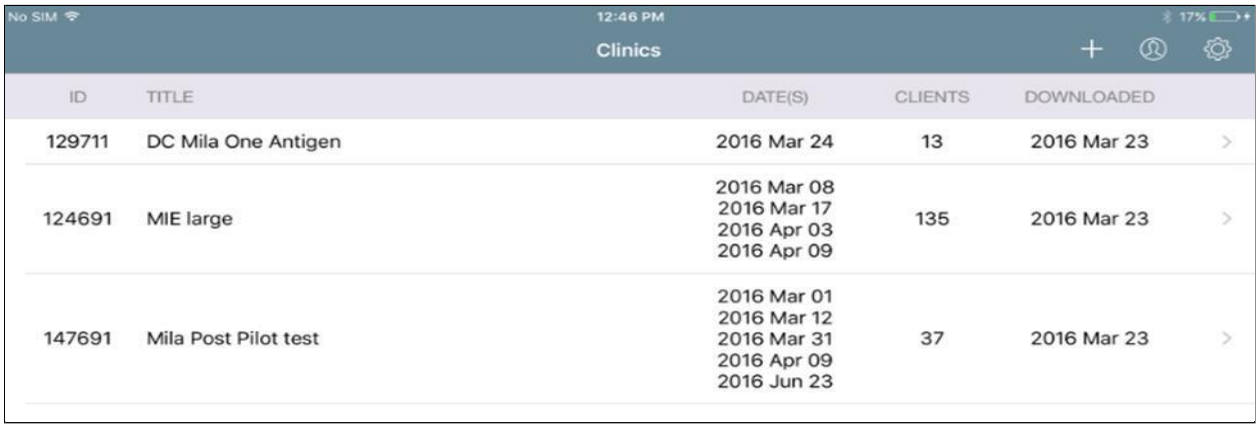
When clinics are shared from one iPad to another all users are required to still upload the data that has been entered into Panorama.

Clinic Day

Upon logging in to m-IMMS, users can see a list of clinics that have already been downloaded.

Additional clinics available from Panorama to download can be found by selecting the (+) icon.

Users can select the specific clinic that they want to work with or if additional clinic details are needed they can be found via the **Information** (ⓘ) icon.



Clinics Available for Download

m-IMMS will only display 2 weeks of active clinics available to download from Panorama. For multi day clinics at least one day must be within the 2 week range to be able to download.

Clinic Status Icon

For each clinic on the m-IMMS application a status icon will appear to inform the user that data has been entered and has not been uploaded to Panorama.

Black < 48 – New data has been entered

Green < 48 - New information has been added to the clinic over 48 hours ago and has not been uploaded to Panorama.

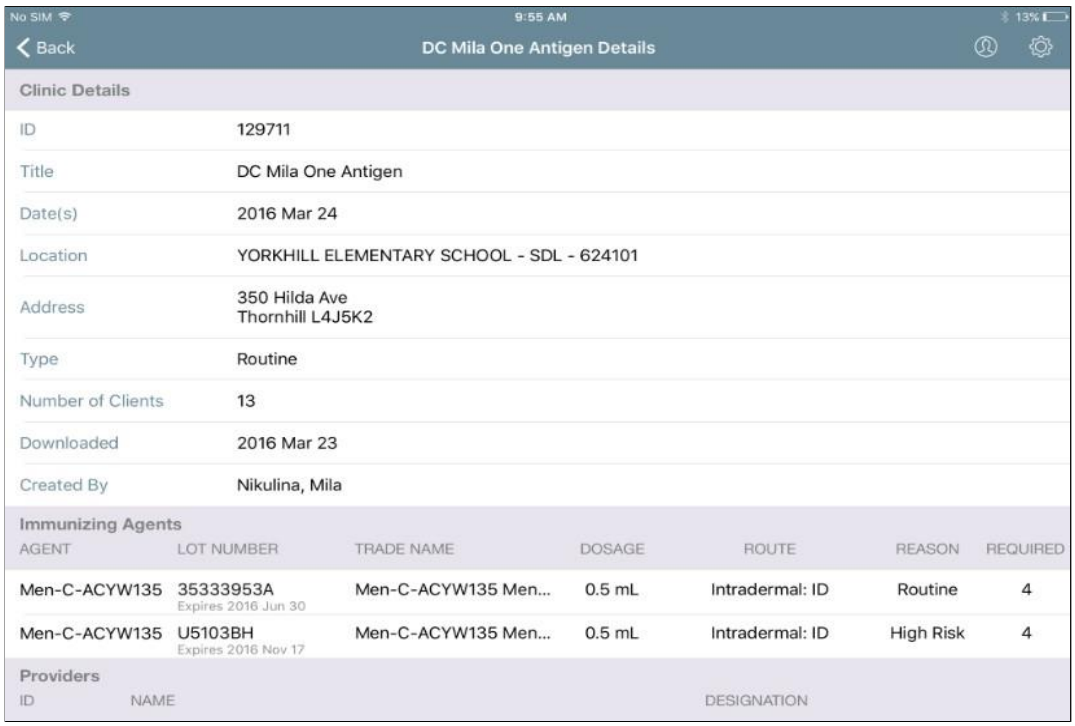
Amber >2 weeks - New information has been added to the clinic over 2 weeks ago and has not been uploaded to Panorama.

Red < 2 weeks - New information has been added to the clinic over 2 weeks ago and has not been uploaded to Panorama.

Best Practice Recommendation: Uploading Information

Clinic information should be uploaded as soon as possible once a secure connection is available.

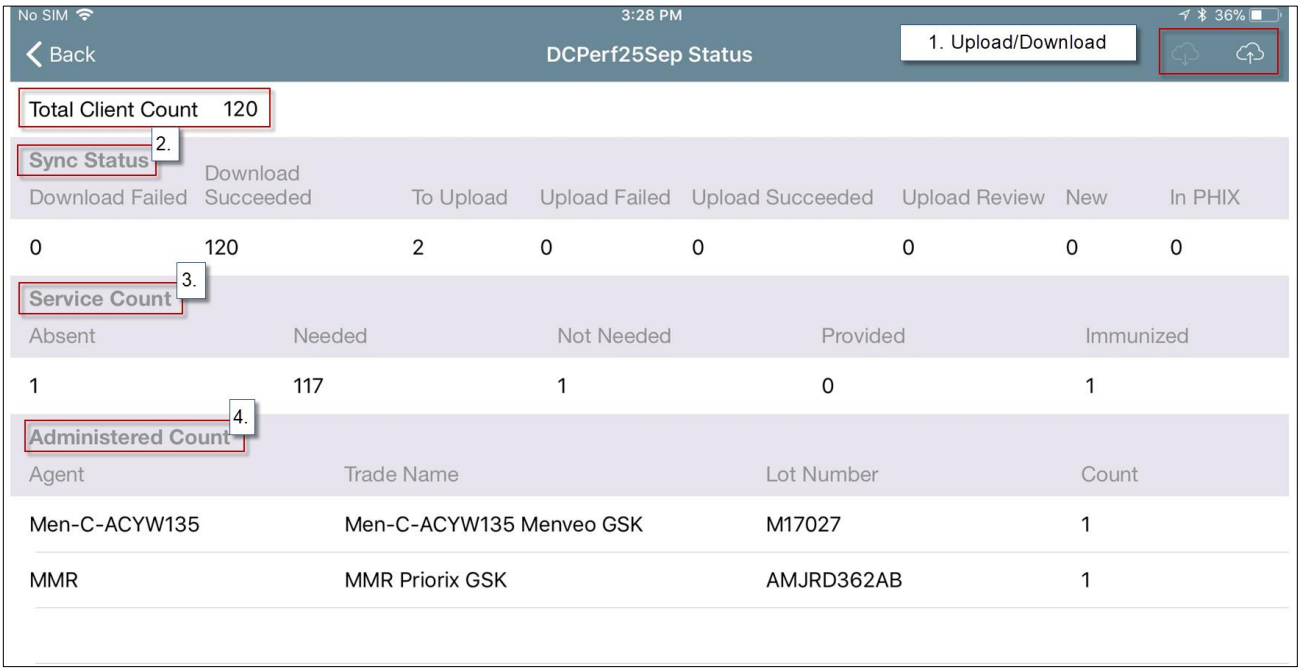
Clinic Information Screen ( )



Displays all the clinic information including the immunizing agents, the number required and the providers for the clinic.

Clinic Dashboard ( )

Displays all the details of the clinic in real time it provides the user upload/download success of each client, the number of clients immunized which agent was administered and the lot#, the service status for the total number of clients. The clinic dashboard provides a summary for each individual iPAd and clinician.



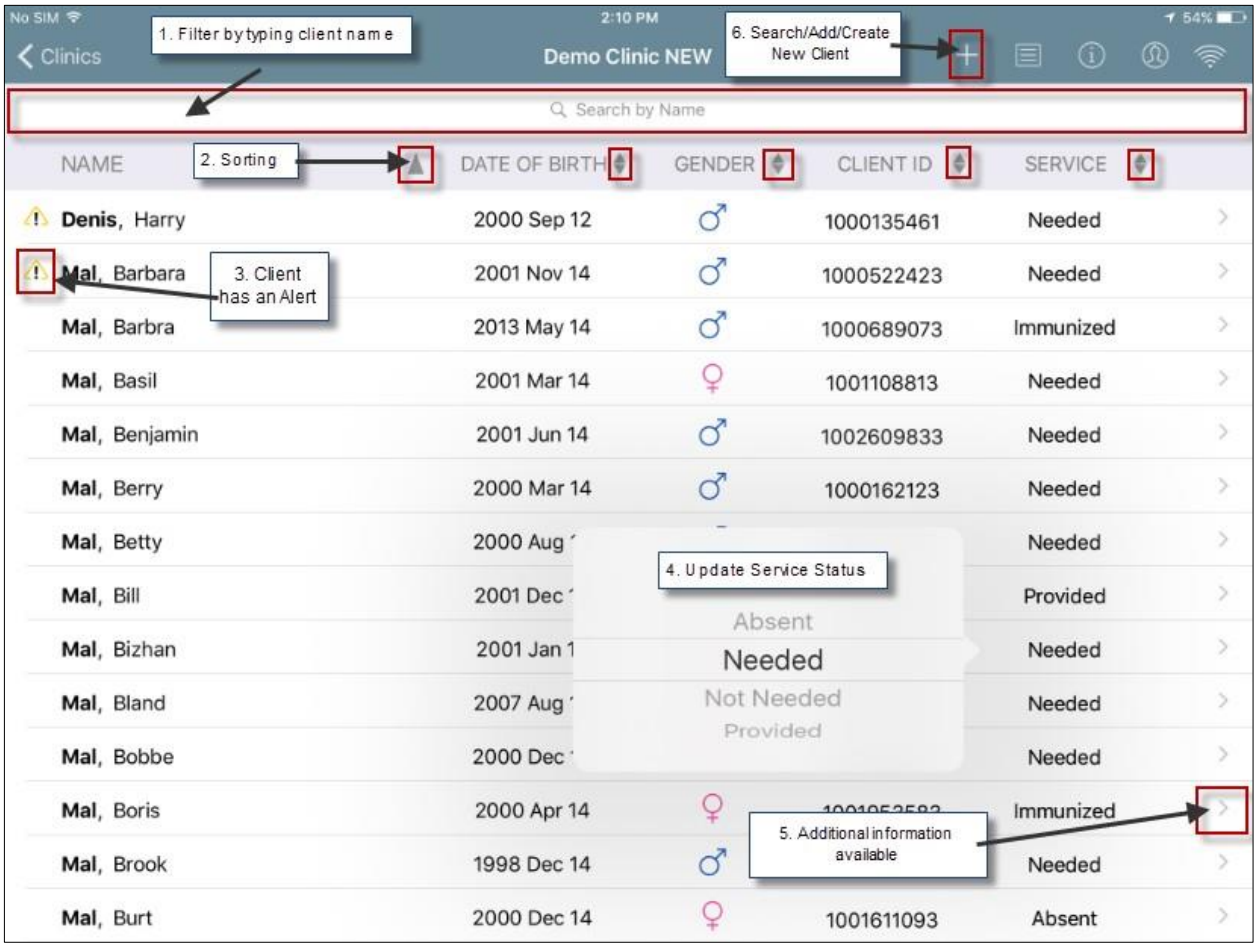
1. The download ( ) and upload ( ) icons enable the user the ability to move data from Panorama to m-IMMS and back.
2. The sync status provides both download and upload status information. If the connectivity is interrupted during download or upload the user would see a number in the failed status. Upload review indicates that the user must review client information in Panorama and update accordingly prior to that client information being successful uploaded.
   In PHIX - All Net New created m-IMMS clients will be uploaded through PHIX to ensure no new duplicates are created. Additional information can be found below in PHIX Integration – 3.2 Functionality
3. Service count provides a breakdown for the service that has been provided by the individual clinician.
4. Administered count provides the number of immunizations provided agent, trade name and lot number.

Once the clinic is open the client list is sorted in alphabetical order by the client's last name.

Client List Screen

The client list provides a complete list of the clients associated to the clinic. The user is able to select the client from the list that they would like to work with. Once the client has been selected the client record opens to the client demographic page.

- (⚠) icon is used to notify the clinician the client selected has an some type of **Alert**: Client Warnings, and/or a Special Considerations – exemptions, contraindications, precautions



Filter and Sorting

1. The client list can be filtered by typing in the clients' name.

2. Sorting can be completed on the following data attributes:

   - Name
   - Date of Birth
   - Gender
   - Client ID
   - Service

3. Client has an **Alert**.

4. Service status can be updated by tapping the current status a picker will appear with additional service status.

5. The chevron indicates that additional information is available.

6. Search existing/Add/Create new client.

   *Must be connected for client search

Service Status

On the Client List screen, the Service column indicates whether the client needs to be assessed at the clinic.

There are five available values:

Value	Description	Functionality
Absent	The client was scheduled to come to the clinic but did not show up. PHUs should follow local policies.	Manual – users must select to apply the value. Absent cannot be selected if the status has been updated by the system to 'Provided'.

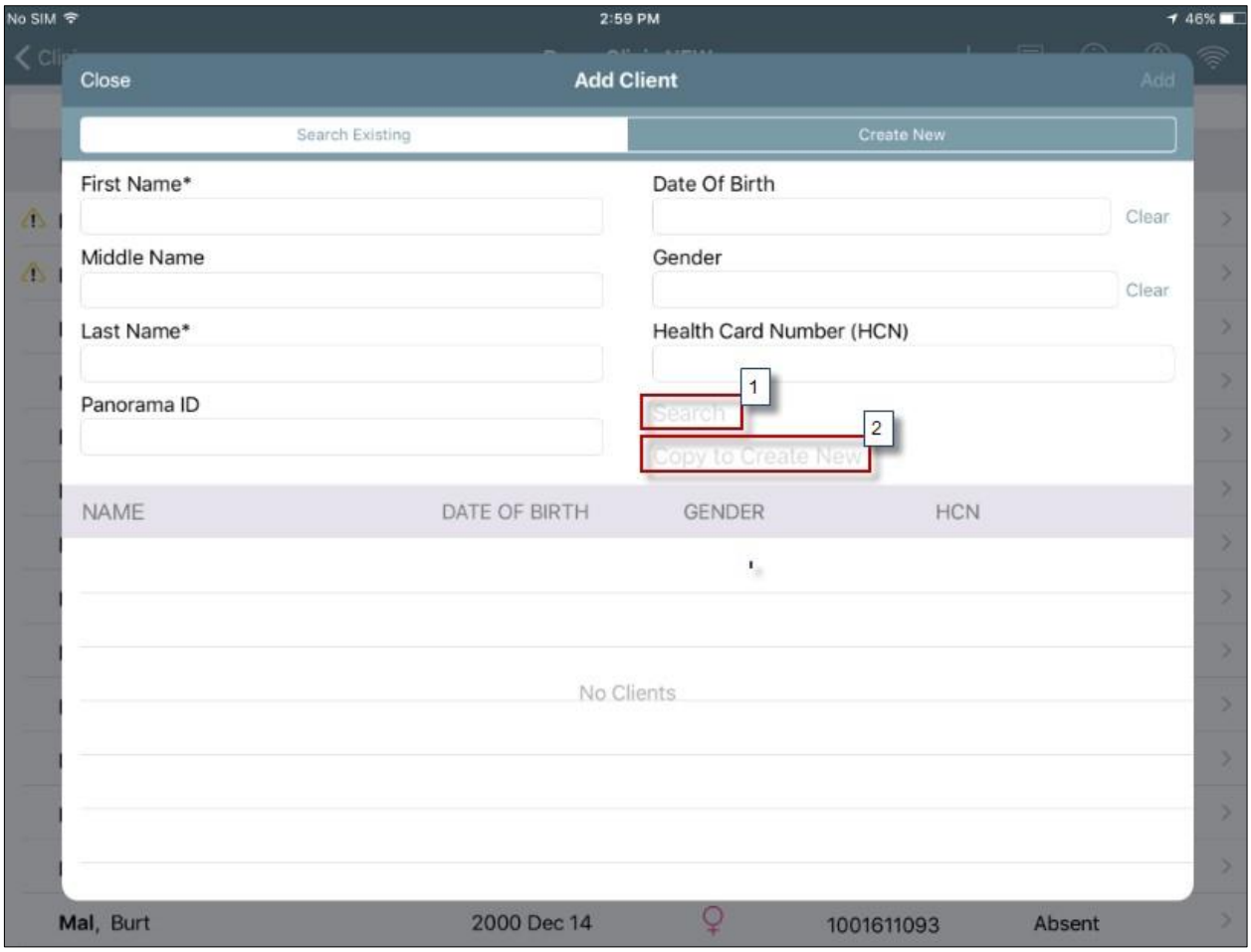
Needed	The client needs to be assessed based on forecast status for any of the immunizing agents offered at the clinic.	System-generated if the client has a forecast status for at least one of the immunizing agents offered at the clinic; or Up-To-Date forecast (users should review) Users can manually update the value.
Not Needed	The client does not require clinic services.	System-generated if the client has one of the following: consent refusal for the immunizing agent offered at the clinic; active exemption; active contraindication Users can manually update the value.
Provided	Client has been seen and received some sort of service at the clinic.	System-generated if new information has been entered such as an administered immunization was entered for the client record in m-IMMS.
Immunized	Client has been administered a vaccine during the clinic.	System-generated if an immunization was administered and saved via the done button. Immunized cannot be overridden.

Service Status mapping to Panorama

m-IMMS service status functionality does not map information back to the Mass Imms Event Worksheet.

Search Existing Client

The user is able to select the ( ) icon to search for existing Panorama (connected) or create a net new client (connected/disconnected).



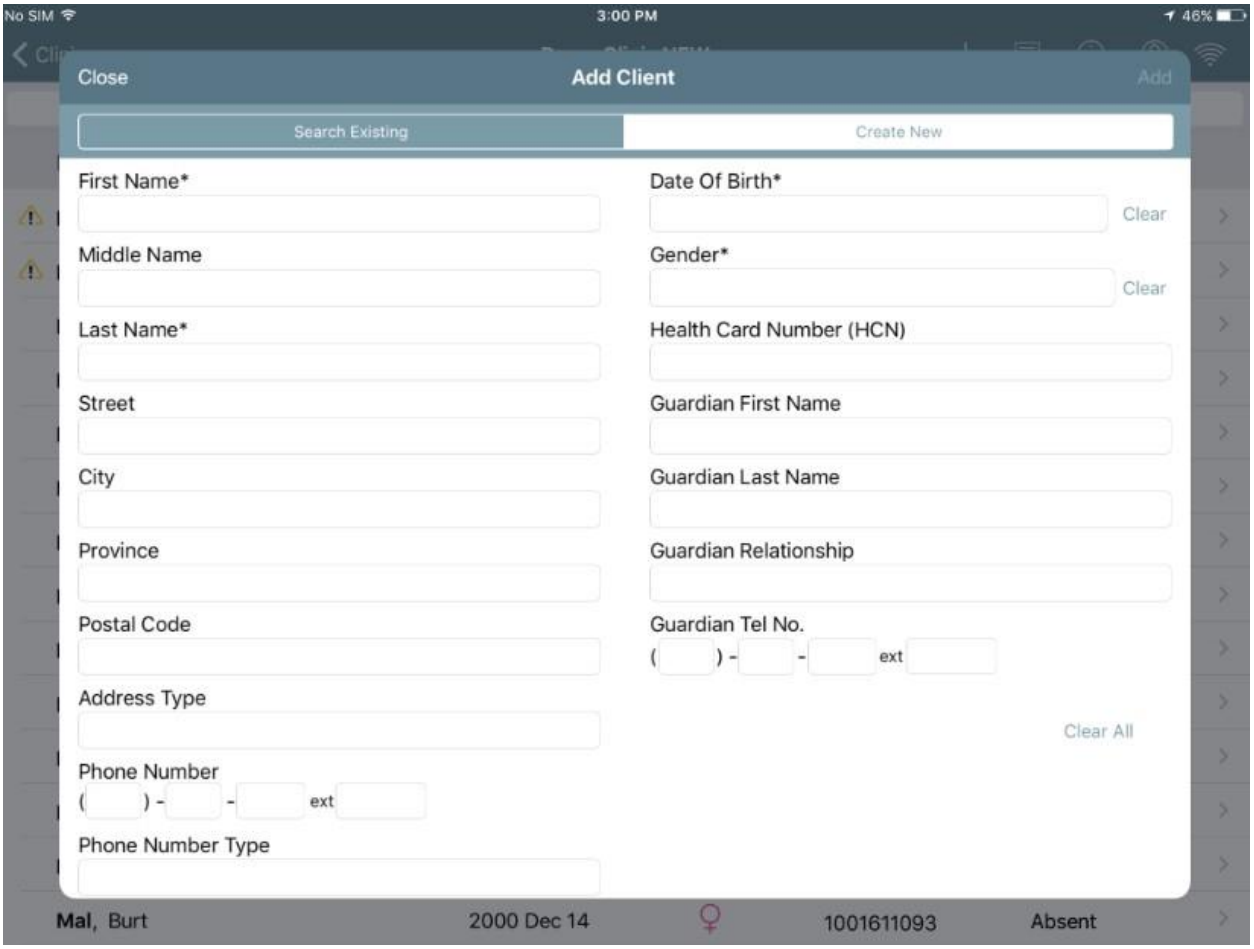
1. Search – Once the required field have been entered the 'Search' becomes activated.
2. Copy and Create New – Client not returned selecting the Copy and Create New feature will copy the searched fields into the create new client screen.

Best Practice Recommendation: Searching Clients

Users should follow the established best practices when searching for clients. Please refer to the Best Practice Recommendations –Searching Clients Appendix B in the Panorama Data Standards and Best Practices document available on the Knowledge Base.

Creating New Clients – PHIX Integration –3.2 Functionality

PHIX R2.5 will be supporting the upload/submission of clients that have been newly created in m-IMMS. To ensure that there are no duplicates created, new clients created in m-IMMS will automatically be sent to PHIX upon upload of the m-IMMS clinic to Panorama. These new clients will follow the existing process of being reconciled in PHIX using the client matching algorithm to identify a potential matching Panorama client(s).



The following outlines the new features and system behaviour in PHIX R2.5 related to m-IMMS integration. Unless otherwise specified below, all other features and system behaviour outlined in the PHIX R2.3 – What to Expect document also apply to m-IMMS submissions.

1) File Upload Tab

Client information for net new clients submitted from m-IMMS will automatically be sent to PHIX for client matching. PHIX users will not need to use the File Upload tab for m-IMMS submissions.

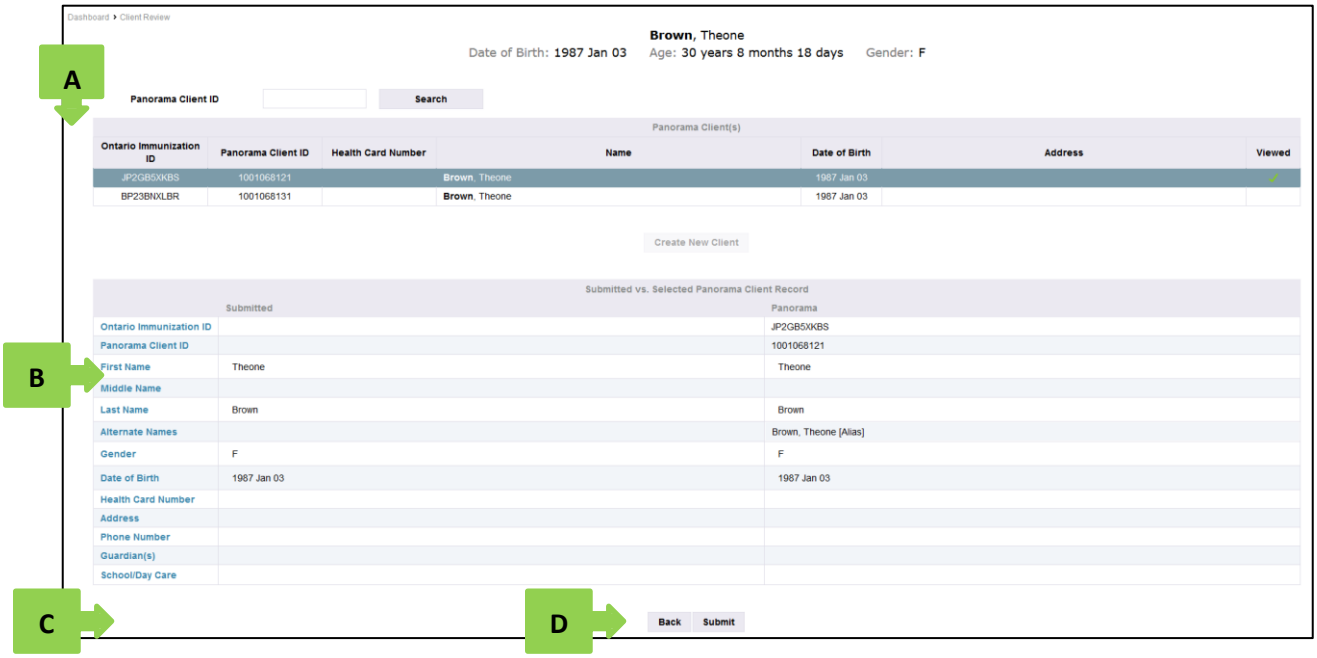
- **File upload:** No manual file upload is required.
- **Source Type:** m-IMMS submissions will automatically be set to "m-IMMS" in the back end. Users will not be presented with an option to select the **Source Type** for m-IMMS submissions.

1) Dashboard Tab

- **Assigning records to PHUs:** Submitted client records from m-IMMS will be assigned to the PHU based on the PHU uploading the clinic.
- **Searching/filtering for m-IMMS submissions:** m-IMMS submissions are denoted with the **Source** "m-IMMS: REF# [m-IMMS Clinic Name]". Users can search/filter for m-IMMS submissions that are pending review by typing in the reference number into the **Source** column search field. To filter for all m-IMMS submissions, users can enter "m-imms" or enter the m-IMMS clinic name.
- Note: If there appears to be duplicate m-IMMS submissions for the same client on the Dashboard, users should reconcile and submit each submission to Panorama since each submission could contain new/different information that is not displayed on the user interface. For example, submission #1 for John Smith contains immunization information while submission #2 contains Special Consideration information – both immunization and Special Consideration information will not be displayed on the user interface, but will need to be added to the Panorama record.

2) Client Review Page

The purpose of processing m-IMMS submissions in PHIX is to leverage PHIX's client matching algorithm to identify a potential match in Panorama. As such, only demographic information from the m-IMMS submission will be displayed on the PHIX user interface; all other submitted data such as immunizations, Special Consideration, etc., will not be displayed.



1. **Drawers:** No drawers (e.g., Submitter drawer) will display on the left hand side of the screen.
2. **Client demographic sections:** Only the client demographic information and sections related to client demographics will display.
3. **Immunization Details section:** This section will not display.
4. **Submit to Panorama:** Upon clicking the "Submit" button, information from m-IMMS will go directly to Panorama to either be added to an existing Panorama client record or as part of a newly created client record. The PHIX user who submitted the new client or updated the client information will be identified in Panorama as the person who created the client. All other information will be associated to the m-IMMS user.
    i. The following information will be sent directly from PHIX to Panorama in the back end and will not be visible on the PHIX user interface:
        - Alerts, which includes Special Considerations
        - Notes
        - Communication Event Log
        - Immunizations (administered and historical)
            - Note: Since immunizations are automatically added to an existing Panorama client record upon clicking "Submit", there is the possibility for duplicate immunizations to be created. In a subsequent interaction

with a client's record, users should reconcile any identified duplicate records.

- Mass Immunization Event information

ii. A new **Guardian(s)** field will display in the comparison table for the user to review. All active guardians from Panorama will display under the Panorama column in the following format: [GUARDIAN LAST NAME], [GUARDIAN FIRST NAME] ([GUARDIAN RELATIONSHIP TYPE]. If there is more than one active guardian in Panorama, they will be listed alphabetically by last name, first name and relationship.

iii. **Updating client demographics for existing Panorama clients:** Users can choose to add or replace data in Panorama with the submitted m-IMMS information.

- Health Card Number – REPLACE Panorama Value
- Name – REPLACE Panorama Value
- Date of Birth – REPLACE Panorama Value
- Gender – REPLACE Panorama Value
- Address – ADD to Panorama
- Phone Number – ADD to Panorama
- Guardian – ADD to Panorama
- School / Daycare – ADD to Panorama

If data attributes are added/updated in Panorama, the *Effective From* date will be set to the m-IMMS data entry timestamp.

iv. Insert/update logic:

- **Guardian(s):** Up to one guardian can be added to a Panorama client record via the m-IMMS submission. For a new client, the guardian will be added to the client's record. For an existing Panorama client where there is existing guardian information, the user can choose to add the new guardian by selecting the "ADD to Panorama" checkbox. In both cases, the newly added guardian will be set as a new active guardian but will not be set as custodial in Panorama.

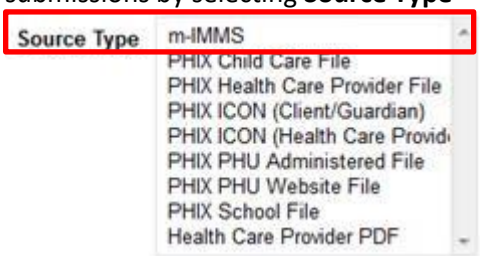
v. **Discarding a submission:** There will be no option to discard a m-IMMS submission as each submission contains information that is not displayed but must be added to Panorama. The "Discard" button will not be available.

vi. The user will be prevented from submitting a duplicate Special Consideration to Panorama and a warning will display: ""Review the client's record in Panorama for duplicate Special Considerations, then try again." Users should review and update the Special Consideration in Panorama (e.g., add an *Effective To* date). After updating the Special Consideration in Panorama, the user can re-submit the m-IMMS submission. **The user will also be prevented from submitting information for idle/offline clients in Panorama and a warning will be displayed: "Your request can not be processed at this time. Try again later."**

3) Submission History Report

For m-IMMS submissions, only information that is displayed in PHIX (i.e. demographic information) will be available in the Submission History Report. Information that is sent from PHIX to Panorama in the back end will not be available.

- **Generating a report for m-IMMS submissions:** Users can generate a report for m-IMMS submissions by selecting **Source Type** = "m-IMMS".



- New fields in the Submission History Report for m-IMMS submissions:
  - Incoming Guardian First Name
  - Incoming Guardian Last Name
  - Incoming Guardian Relationship
  - Panorama Guardian
  - Final Guardian (the final value saved into Panorama from PHIX)

Wizard – Navigation

Upon selecting a client record, m-IMMS displays the client information in a wizard format that follows typical clinic workflow. Users can select the number on the wizard or swipe left to move from screen to screen.

There are six screens:

Screen	Description
Demographics	Displays client and guardian demographics. m-IMMS displays active information only, such as active client addresses, telephone numbers, and guardian relationships.

Alerts	Displays client warnings, exemptions, contraindications, precautions, and deferrals in that respective order. Users can only create new Alerts associated to the agents within the clinic. Newly created deferrals, client warnings, exemptions, contraindications and precautions will display a (NEW) icon above the note date. Users can only create new alerts by selecting the (+) in m-IMMS and then selecting the type of alert the user would like to create. On the wizard, an icon will display the number of alerts that the client has in total to notify users that they should check the ***Alerts*** screen. *Note – deferrals will be displayed but will not be counted as part of the alert total icon.
Immunization Assessments	Displays the client's immunization history and forecast by agent and disease. The Immunization History section displays a new column called Since Last Dose, that shows the difference between the last recorded dose and the previously recorded dose for the same immunizing agent. Users can also select an immunization record to see details more details. Under the Forecast by Disease section, users will see antigens where the client has a "Not Forecasted" status. *This does not display in Panorama*.
Notes	Displays all Clinical Notes and Communication Logs for the client. Users can search for Clinical Notes and Communication Logs by subject/topic and note text/comment body. Users can only create new Notes in m-IMMS and must select a value for the Subject field and the note message to save the record. Notes created in m-IMMS will display a (NEW) icon above the note date. Users can only create new consents by selecting the (+) in m-IMMS. On the wizard, an icon will display the number of notes that the client has in total to notify users that they should check the ***Notes*** screen. Communication Logs although are displayed on the ***Notes*** screen are not counted as part of the icon total count.

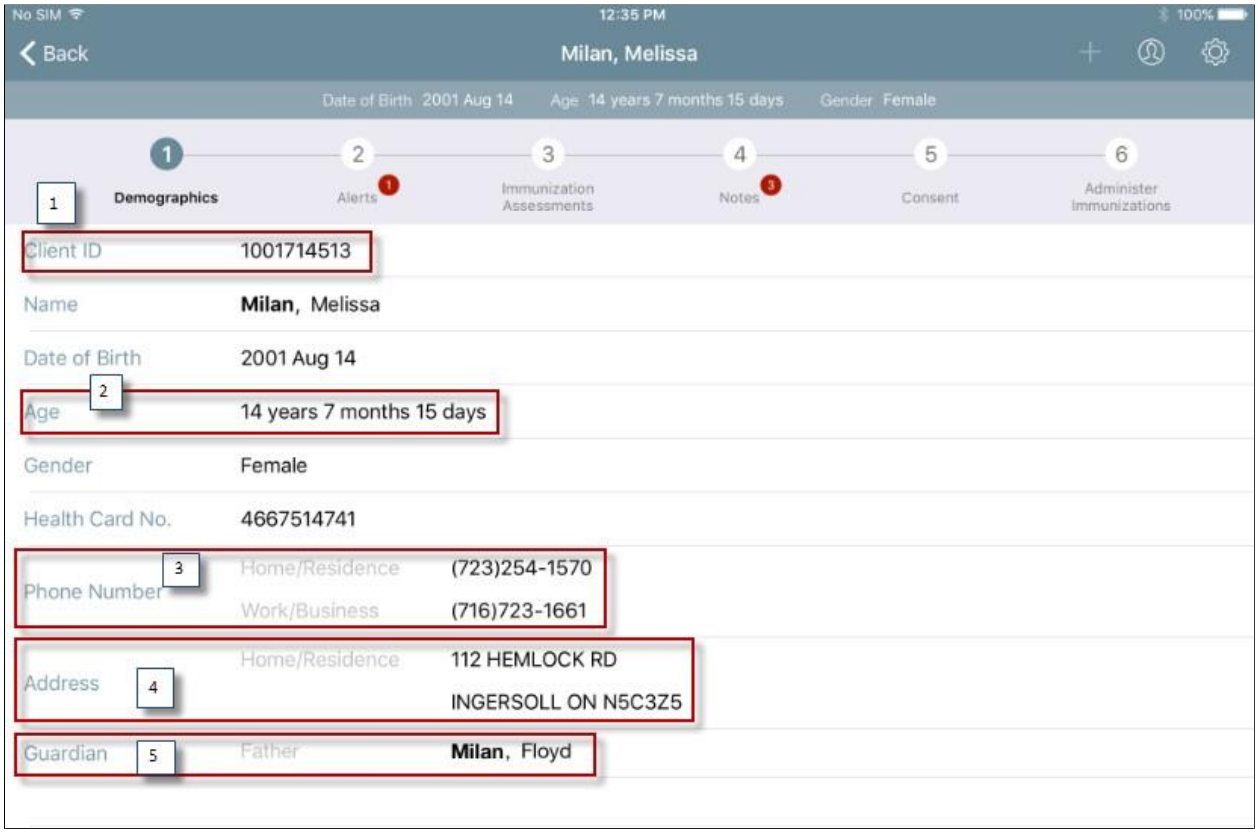
Consent	Displays consent records for the antigens that comprise the immunizing agent(s) offered at the clinic. The client may have other consent records (active or expired) in Panorama but these will not display if it's not for the antigens associated to the clinic. Users can only create new consents by selecting the ( ) in m-IMMS. Consents created in m-IMMS will display a (NEW) icon above the antigen that consent was created for.
Administer Immunizations	Displays the immunizing agents offered at the clinic. On the left side of the immunizing agent row is a forecast status icon that indicates the client's forecast for the immunizing agent. • Red = Overdue • Green = Eligible • Black = Up to Date • Amber = Due Users must select the forecast icon to record an immunization. Like Panorama, users can record an immunization regardless of forecast status. Note that the Date and Time Administered value is based on the information when the user accessed the screen. Users will receive a message confirming that the immunization was saved to m-IMMS. The ***Administer Immunizations*** screen will not change – users should always check the client's ***Immunization Assessments*** screen to validate that a new immunization record was saved. The new record will display a (NEW) icon above the immunizing agent.

Gender

On the ***Client List*** screen, users will see three gender icons: blue (male), pink (female), and a black circle that represents other/unknown/undifferentiated. When users select a client record, the client header will display the client's gender as it was recorded in Panorama in text and also on the ***Demographics*** screen.

Demographics

The demographics tab/wizard shows the client's information including the Panorama ID, full name, date of birth, age, gender, and health card number, preferred phone number, preferred address and guardians' information.



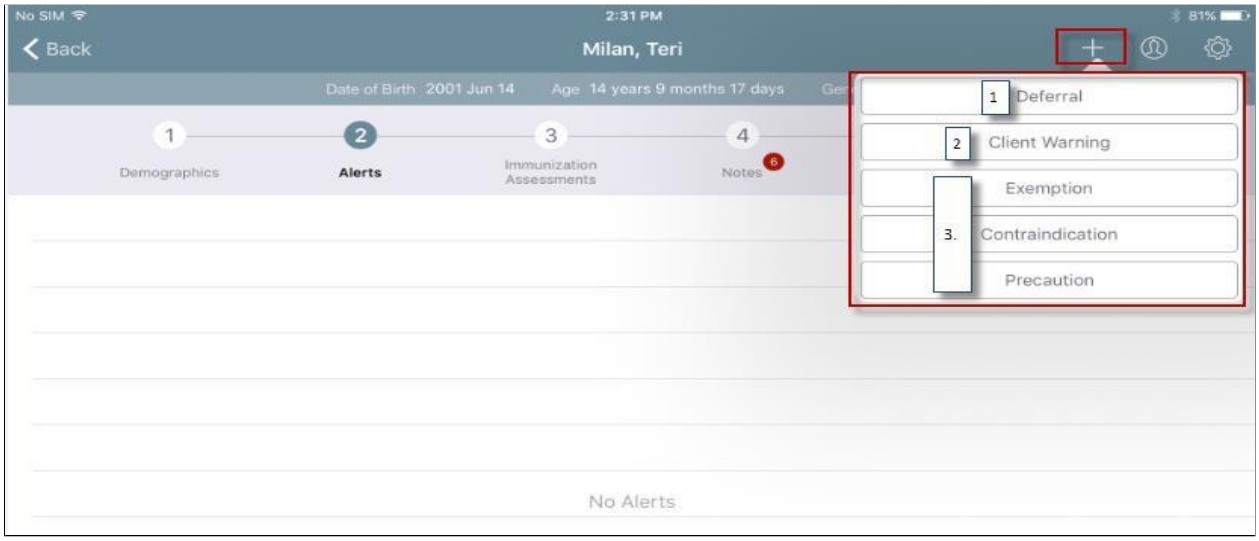
1. Client ID – The Panorama ID #.
2. Age is calculated and displayed by calculating the difference between Access date of when a user selected the client's demographic information from and the client's date of birth.
3. Active phone numbers will only be displayed. Active is defined as where the Effective to date is blank or equal to/greater than the Download date.
4. Active address marked preferred will be displayed. If the address is not marked as preferred then the most recently added address will be displayed. Most recent is defined by the latest effective from date.
5. Active guardian relationships with the custodial flag will be displayed.

Leap Year

m-IMMS is able to calculate the leap day and leap year.

Alerts

The alerts tab on the wizard allows users to view and create client warnings, special considerations – exemptions, contraindications, precautions, and deferrals.



The user is able to select the ( ) icon to create an alert. Once the ( ) icon is selected 5 options are displayed.

1. **Deferral** – A deferral occurs when a client ultimately does not receive the immunization(s) that he or she was scheduled to receive but still intends to be vaccinated.
    a. The deferral is created at the agent level.
    b. Notes entered when creating a deferral automatically become a clinical note if user is a clinician. **Functionality Admin/Clerical** Notes entered when creating a deferral automatically become a communication event log if user is a admin/clerical. The **Note** tab will also display a ( ) icon. This is used as a flag to alert the clinician that additional information is available.
    c. Select **Done** to save the deferral.

Deferral Not a Part of the Alert Icon

A deferral for a client does not display an alert icon ( ). The alert icon is only displayed for a client who has a client warning(s), or special consideration(s) – Exemptions, Contraindications and Precautions.

2. **Client Warning** – A client warning is used to record information about clients that may need to be considered when providing services to the client. PHUs can use Client Warnings as a way to immediately alert users about information that they should review in the client's file.
    a. Select **Done** to save the client warning.

3. **Special Considerations:**
   Exemption(s) – An exemption is selected if the client is exempted because of medical or religious/philosophical reasons.
   Contraindication(s) – A contraindication is selected if the immunizing agent cannot be administered to the client because the health risk outweighs the benefit(s).
   Precaution(s) – A precaution is selected if the client receives an immunization but may be at an increased risk of an Adverse Event Following Immunization (AEFI). If the benefit of immunization outweighs the risk, users should administer the vaccine and record a precaution.
    a. The agent is selected for the **Exemption** however; the **Exemption** record is created at the disease level.
    b. The agent is selected for the **Contraindication/Precaution** however; the **Contraindication/Precaution** is created at the antigen(s) level.
    c. Once any special consideration is created a ( ) icon is displayed. This flag is to notify the clinician that an alert has been documented.
    d. Notes entered when creating any type of special consideration automatically becomes a clinical note. The **Note** tab will also display a ( ) icon. This is used as a flag to alert the clinician that additional information is available. **Functionality Admin/Clerical** Notes entered when creating a special consideration automatically become a communication event log if user is a admin/clerical.
    e. Select **Done** to save the special consideration.

Alerts created in m-IMMS will display (NEW) icon above the alert date.

If the client does not have any Alerts and the user selects the Alert tab the page will display a message 'No Alerts'.

Best Practice Recommendation: Alerts - Client Warnings and Special Considerations

Users should follow the established best practices when creating any type of Alert - Client Warning(s) and/or Special Consideration(s). Please refer to the Best Practice Recommendations – Client Warning(s)/Special Consideration(s) section in the Panorama Data Standards and Best Practices document available on the Knowledge Base.

Exemptions: *Immunization of Schools Pupil Act*, 1990 (ISPA).

Exemptions can only be created for the mandated diseases in the *Immunization of Schools Pupil Act*, 1990 (ISPA). All other diseases will be greyed out and not selectable.

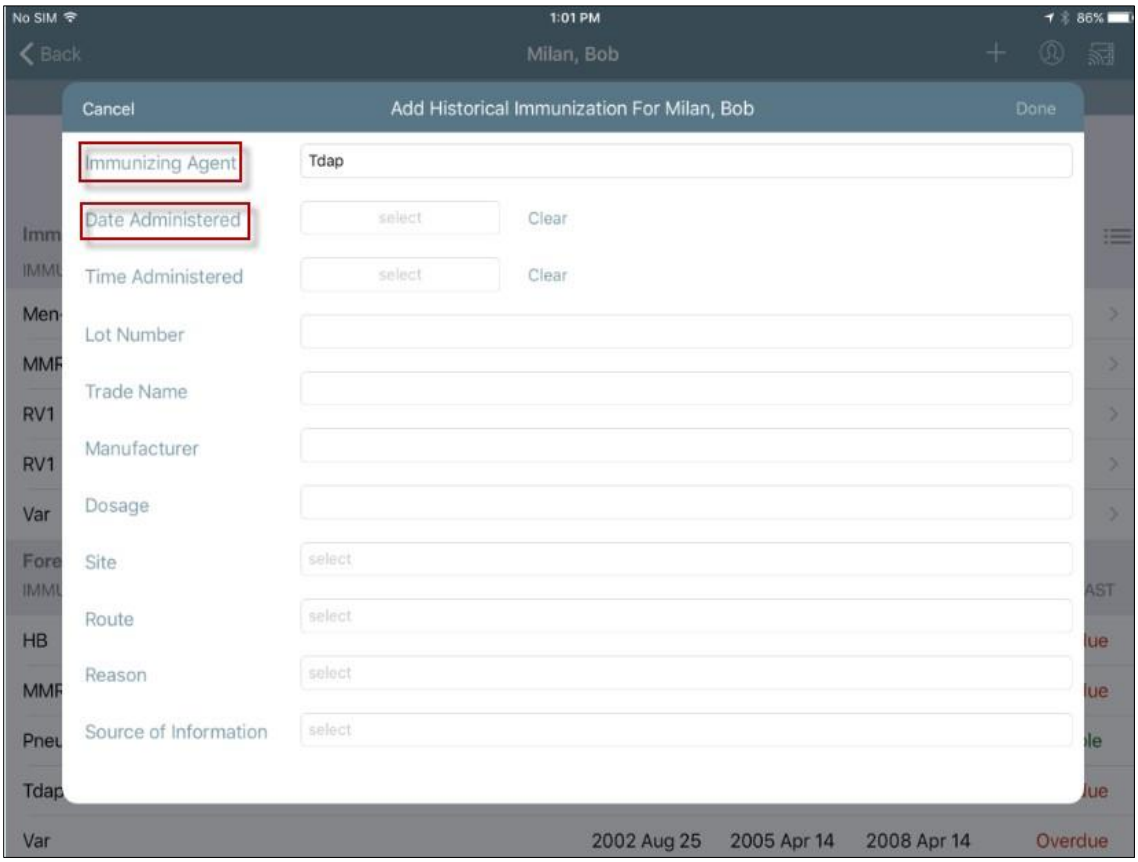
Immunization Assessment

The Immunization Assessment tab on the wizard provides a detailed view of the clients' immunization history and add historical immunizations. The forecast status by Agent and Disease sections display recommended immunizing agents and the diseases that the client is forecasted to receive protection from as per the latest publicly funded Ontario Immunization Schedule.

1. Since last dose provides the interval between the two most recent immunization records for the same agent. Since last dose value = Age at Administration (of Dose record in Context) minus Previous Dose's Age at Administration.
2. Indicator that additional immunization details are available and may include the following:
    - Immunizing Agent
    - Date Administered
    - Time Administered
    - Age at Administration
    - Lot Number
    - Trade Name
    - Manufacturer
    - Dose Number
    - Dosage
    - Site
    - Route
    - Reason for Immunization
3. The user is able to select the ( ) icon to add historical immunizations.

Adding Historical Immunizations –3.1 Functionality

By selecting the ( ) icon m-IMMS users are able to now add historical immunizations. Once the ( ) icon has been selected a screen will appear which will allow the user to enter in historical immunization information.



The immunizing agent and the date administered are the only 2 required fields that must be completed to add an historical immunization however, if additional information is known then the user is encouraged to add all known information. Select done for the immunization to be saved and the newly entered immunization will be marked NEW.

Immunizing Agent - type ahead field and will display 5 agents and is case sensitive.

Forecast by Agent

IMMUNIZING AGENT	ELIGIBLE	DUE	OVERDUE	FORECAST
HB	2011 Oct 14	2011 Oct 14	2011 Nov 14	Overdue
HPV-4	2012 Sep 06	2012 Oct 14	2012 Nov 14	Overdue
Men-C-ACYW135	2001 Jan 14	2012 Sep 01	2013 Aug 31	Overdue
MMR	2001 Aug 11	2001 Aug 11	2001 May 14	Overdue
Pneu-P-23	2002 Apr 14	2065 Apr 14	2065 May 14	Eligible
Tdap-IPV	2000 May 26	2000 Jun 14	2000 Jul 14	Overdue
Var	2001 Oct 14	2004 Apr 14	2007 Apr 14	Overdue

Agents displaying as N/A – No longer applicable display is corrected.

These agents are no longer available to be selected from the drop down list in Panorama. Example men-AC-unspecified.

Forecast by Disease

No SIM 9:39 AM 49%

Back Malia, Basil

Date of Birth 2000 Apr 14 Age 15 years 11 months 18 days Gender Female

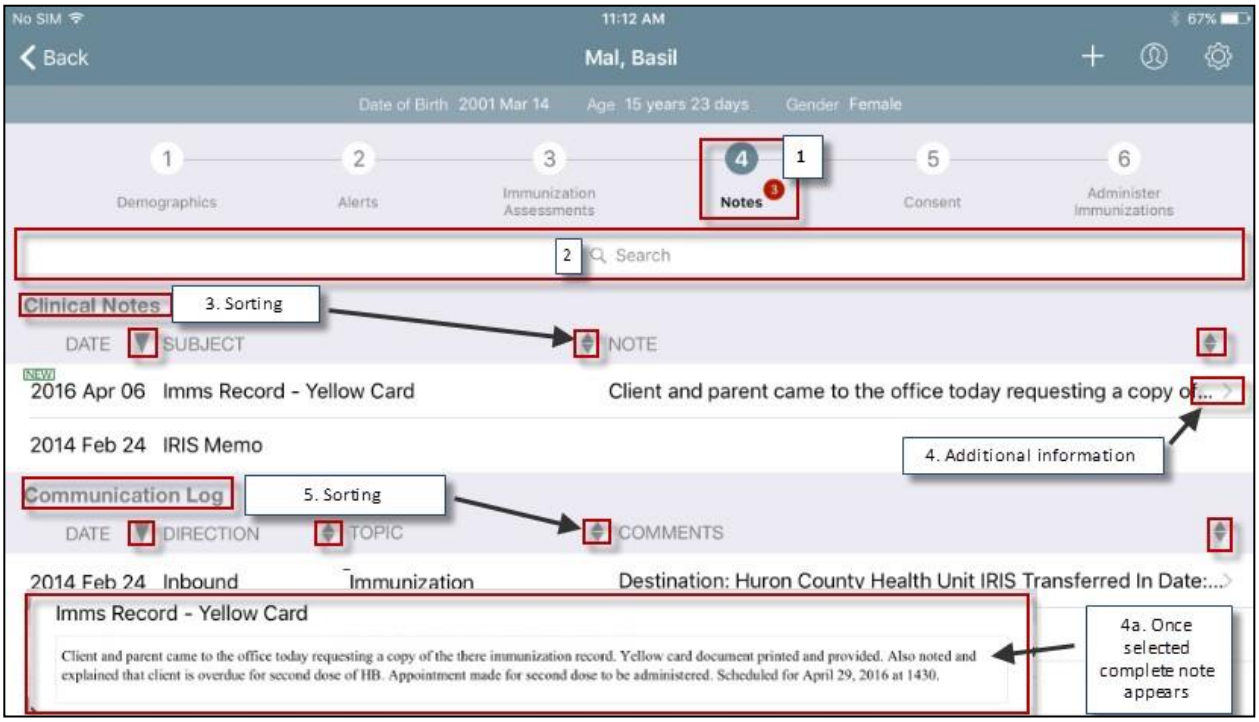
1 Demographics 2 Alerts 3 Immunization Assessments 4 Notes 2 5 Consent 6 Administer Immunizations

Forecast by Disease

DISEASE	ANTIGEN	ELIGIBLE	DUE	OVERDUE	FORECAST
Diphtheria	Diphtheria (d)	2000 May 26	2000 Jun 14	2000 Jul 14	Overdue
Human papilloma virus infection	HPV-4	2012 Sep 06	2012 Oct 14	2012 Nov 14	Overdue
Measles	Measles (M)	2001 Aug 11	2001 Aug 11	2001 May 14	Overdue
Meningococcal disease	meningitis (men-C-ACYW135)	2001 Jan 14	2012 Sep 01	2013 Aug 31	Overdue
Mumps	Mumps (Mu)	2001 Aug 11	2001 Aug 11	2001 May 14	Overdue
Pertussis	pertussis (ap)	2000 May 26	2000 Jun 14	2000 Jul 14	Overdue
Pneumococcal disease	Pneumonia (Pneu-P-u)	2002 Apr 14	2065 Apr 14	2065 May 14	Eligible
Poliomyelitis	Polio (IPV)	2000 May 26	2000 Jun 14	2000 Jul 14	Overdue
Rubella	Rubella (R)	2001 Aug 11	2001 Aug 11	2001 May 14	Overdue
Tetanus	Tetanus (T)	2000 May 26	2000 Jun 14	2000 Jul 14	Overdue
Type B viral hepatitis	Hepatitis B (HB-regular)	2011 Oct 14	2011 Oct 14	2011 Nov 14	Overdue
Varicella	Varicella (Var)	2001 Oct 14	2004 Apr 14	2007 Apr 14	Overdue

Notes

Displays all Clinical Notes and Communication Logs for the client.



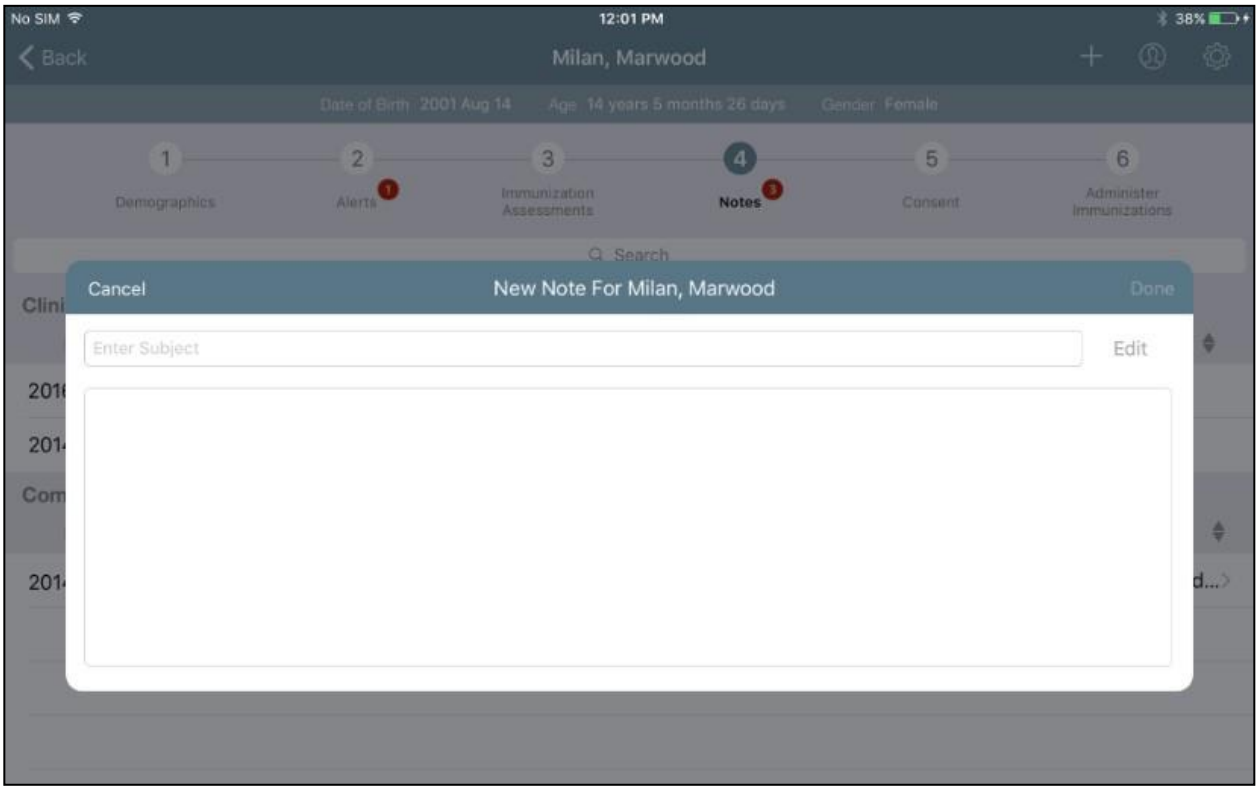
1. On the wizard, an (3) icon will display the number of notes that the client has in total to notify users that they should check the Notes screen.
2. Users can search, narrow, and filter through clinical notes/communication logs by typing in key words.
3. Clinical notes are displayed and can be sorted by date, subject and note by selecting any of the arrows.
4. The … is displayed to indicate that additional information is available.
    a. Once selected the complete note appear in a pop-up.
5. Communication logs are displayed and can be sorted by date, subject and note by selecting any of the arrows. Currently users are not able to enter any communication logs in m-IMMS they are only able to view.

Communication Event Logs

Communication Logs although are displayed on the notes screen are not counted as part of the icon total count.

Creating a Clinical Note – Clinicians Only

The clinician is able to select the (+) icon to create a clinical note. Once the (+) icon is selected a modal appears and user is able to enter the note.

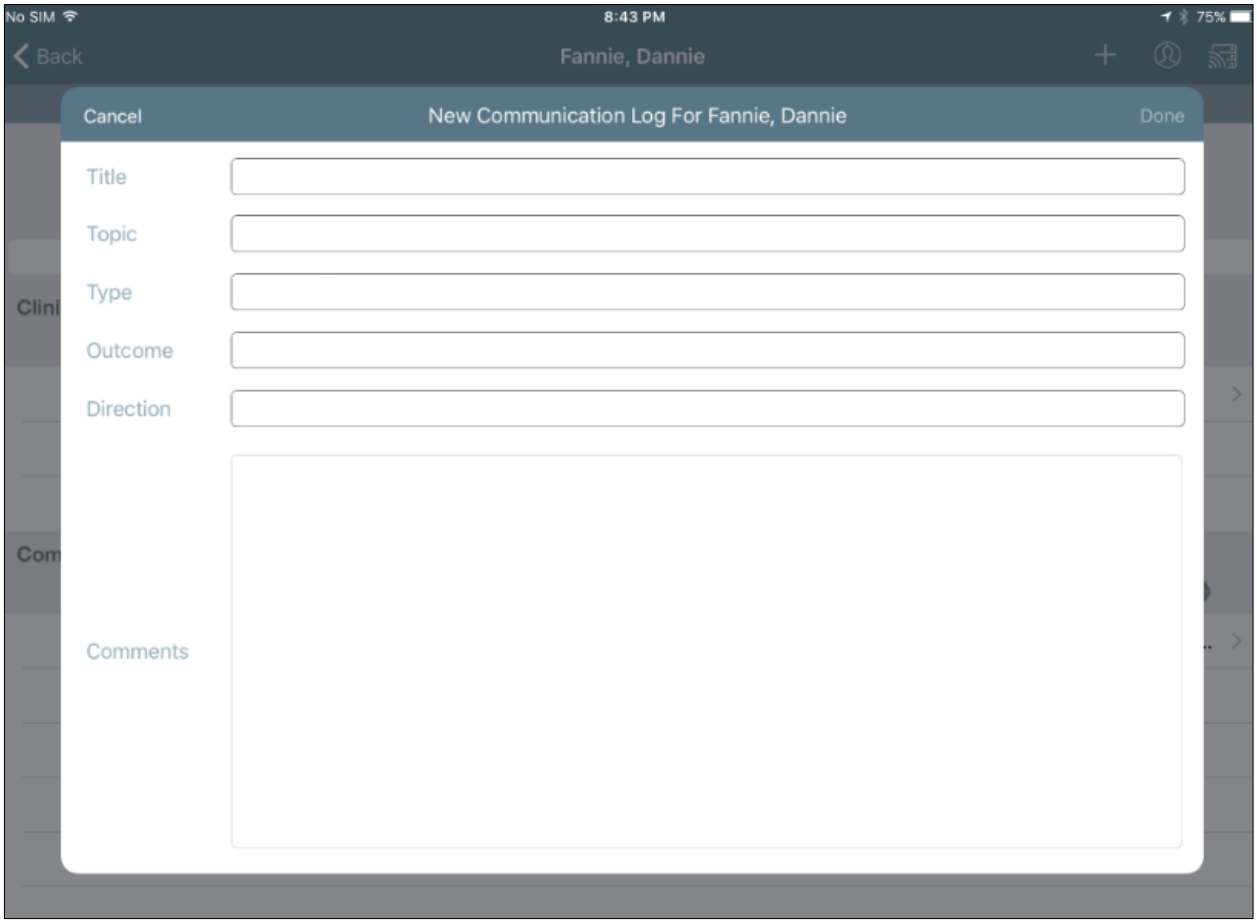


Users can only create new Notes in m-IMMS and must select a value for the Subject field and the note message in order to save the record. Once the subject of the note has been selected the user can edit if needed. Once all documentation has been completed select done to save the note.

Notes created in m-IMMS will display (NEW) icon above the note date and will display the name of the user who created the note, there designation and the PHU they belong to.

Creating Communication Event Logs – Admin/Clerical Role –3.1 Functionality

The admin/clerical user is able to select the (+) icon to create a communication event log (CEL). Once the (+) icon is selected a modal appears and user is able to enter the CEL.



Users can only create new CEL's in m-IMMS and must type in a title for the CEL and select from the list selectors one of the values for each of the following:

- Topic
- Type
- Outcome
- Direction
- Comments if required

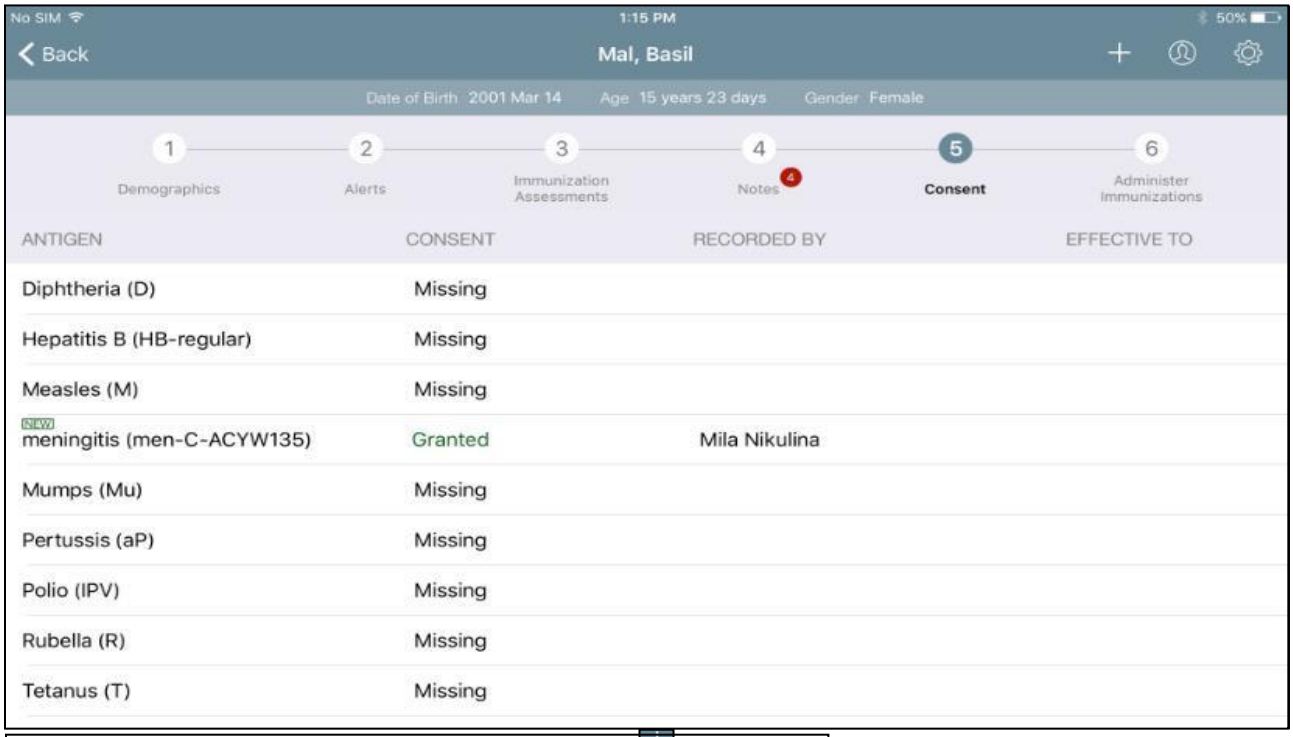
Once all fields have been completed select doe for the CEL to be saved. Communication Event Logs (CEL's) created in m-IMMS will display (NEW) icon above the CEL date. The CEL will also display the name of the user who created the CEL and the PHU they belong to.

Created Date and Time in Panorama

The date and time that the communication event log was created will be correctly displayed within the CEL but the created date and time displayed in Panorama is off by 4 hours. (Planned fix November)

Consents

Only consent records will be displayed for the antigens that comprise the immunizing agent(s) offered at the clinic.

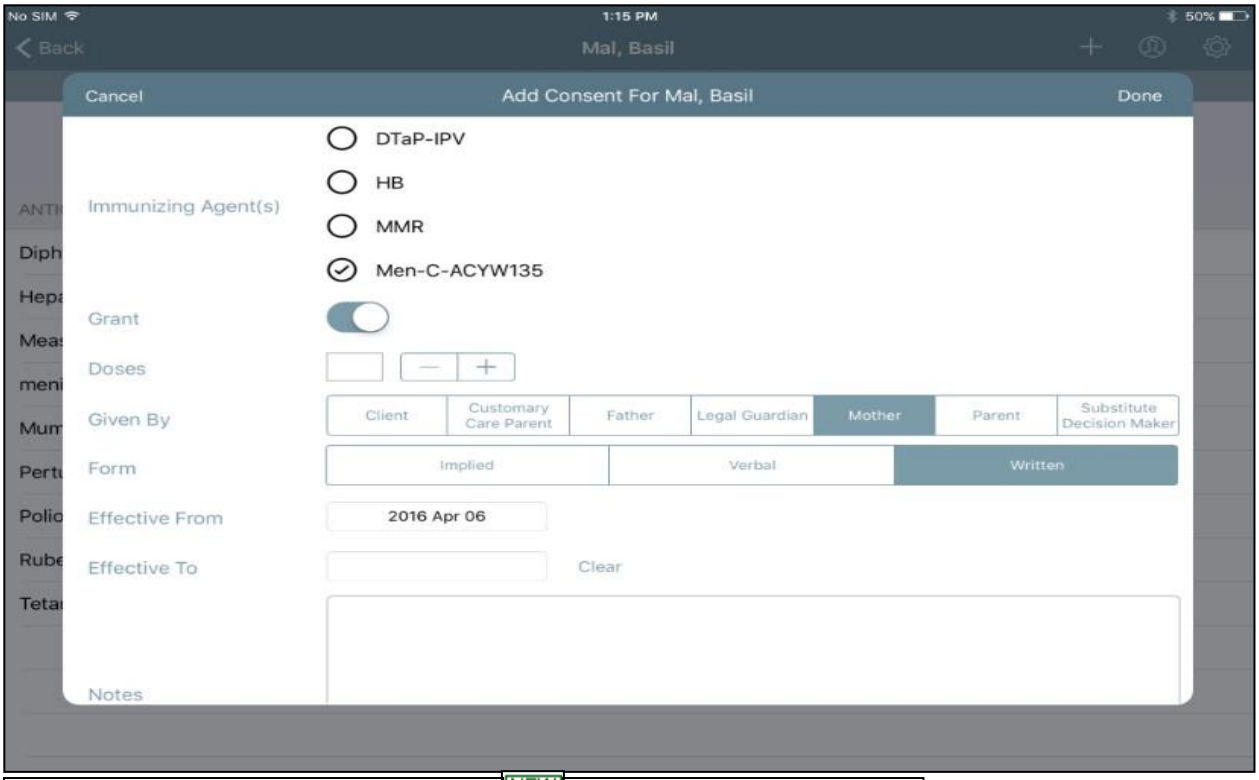


Users can only create new consents by selecting the ( ) in m-

Draft Consents

All consents that have been entered into Panorama including draft are downloaded into the client record. Users must create a new consent for the agent even if the client has a draft consent for the same antigen.

Adding a Consent



Consents created in m-IMMS will display (NEW) icon above the consent date.

The recorded by filed will display the name of the user who created the record in m-IMMS. Once the consent record has been uploaded back to Panorama, the Consent Given To field will display the Last Name, First Name, and PHU the user associated when the consent record was created.

Consent

There are several updates to the consent functionality in m-IMMs for 2.7

- Consent refusal Toggle has been replaced with a button to represent a consent refusal
- Free text box field has been added so that users can enter the actual name of the

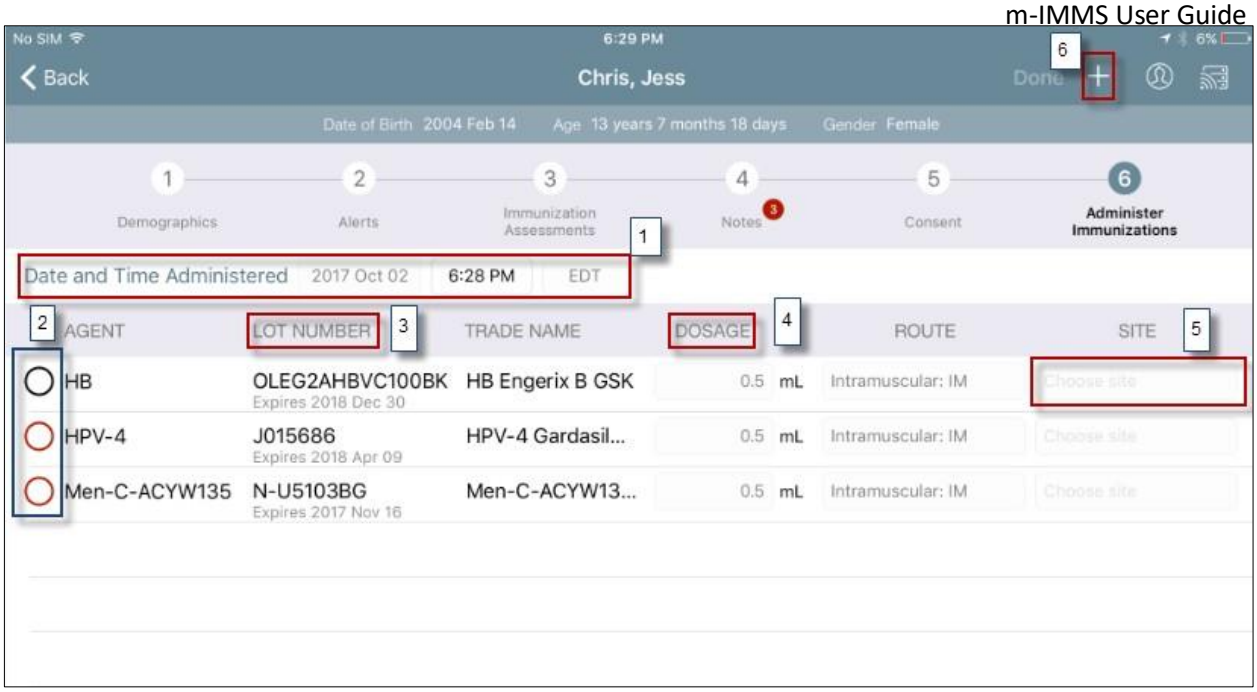
person who gave consent e.g. Jane Smith

Best Practice Recommendation: Consent for Immunization Services

Users should follow the established best practices when creating Consent for Immunization Services. Please refer to the Best Practice Recommendations – Consent for Immunization Services section in the Panorama Data Standards and Best Practices document available on the Knowledge Base.

Administer Immunizations

Displays the immunizing agents offered at the clinic.



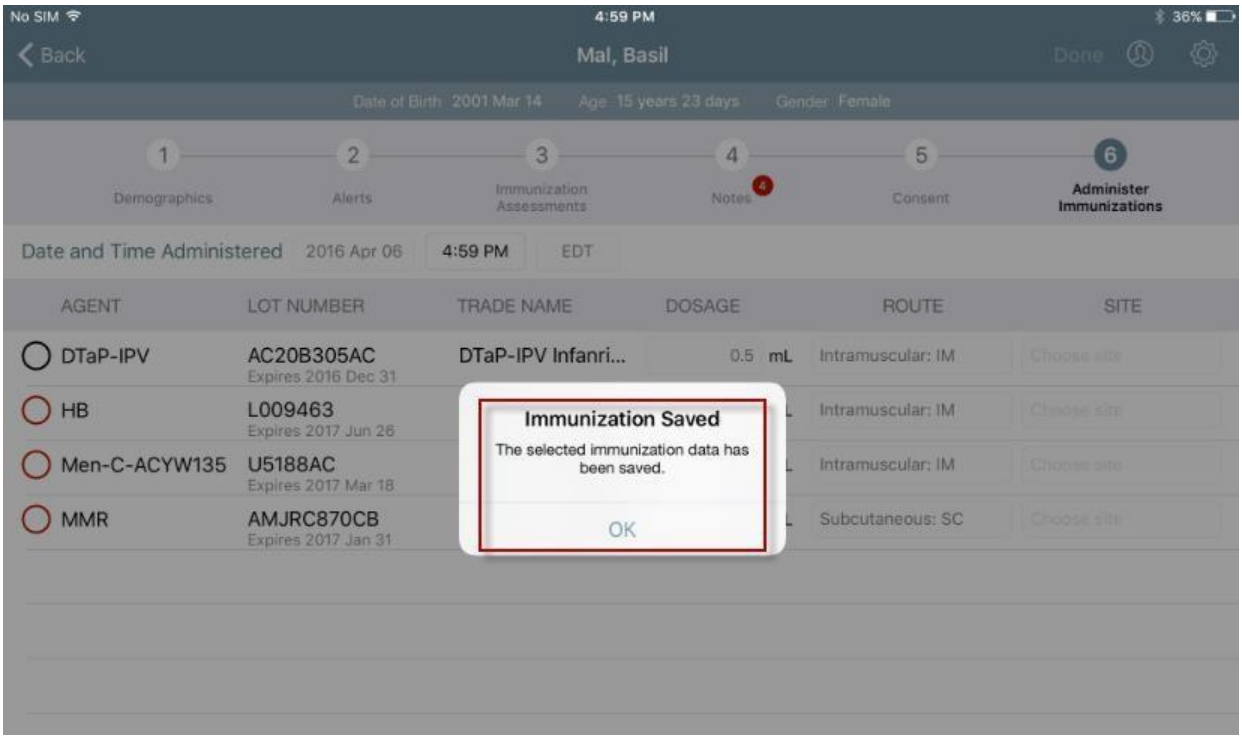
1. Date and time – The time that is displayed is when the user first accessed the ***Administer Immunization*** screen. If the user has remained on this screen for a period of time they may want to update the time by moving to another screen and returning to ***Administer Immunizations*** or by manually updating.
2. The forecast icon is used to select the immunization the user is administering. The icon colour represents the forecast status for the client.

- Red = Overdue
- Green = Eligible
- Black = Up to Date
- Amber = Due

3. Lot Number – The lot number displayed is the lot that was selected when the clinic was created. If more than one number has been selected for the clinic the user will see that particular agent more than once in order to display all lot numbers. The user must ensure the correct lot number is recorded.
4. Dosage – As with Panorama if the user is required to change the dose to be administered they are able to by tapping on the dose box and entering in the correct dosage.
5. Site must be selected for each agent the immunization was administered prior to selecting done to save the immunization.
6. Add a new agent or lot number.

Recording Immunizations in m-IMMS

After recording an immunization in m-IMMS, a pop-up message appears confirming that the immunization record has been saved.



Users must review the client's profile on the ***Immunization Assessments*** screen to validate that the new record was created and avoid creating a duplicate immunization record. This is important because the Administer Immunizations screen will not display a confirmation after users select "OK" on the pop-up message.

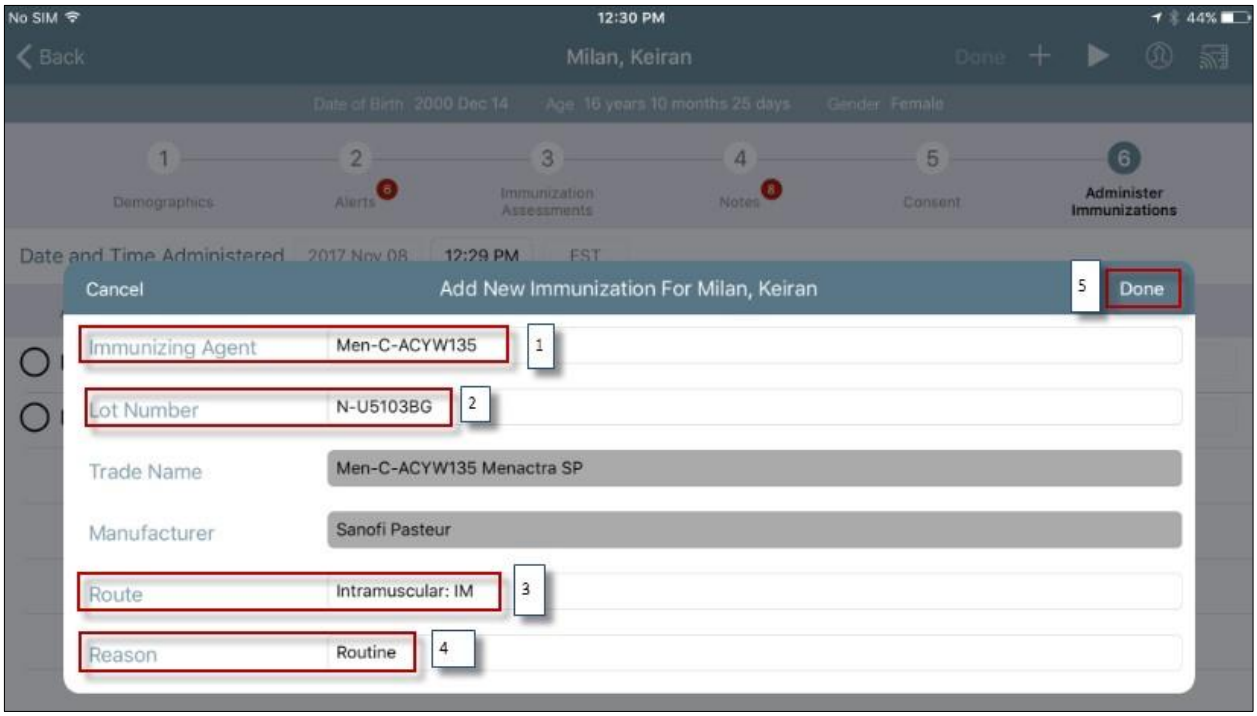
Recording Immunizations – Avoid Duplication

Users may accidentally record two immunization records if they do not confirm that the first immunization record was saved by reviewing the client's Immunization Assessments screen. Currently, m-IMMS does not allow users to delete an immunization record. Users will need to resolve in Panorama after uploading the data.

Adding New Agent/Lot Number

New agents and lot numbers can now be added at the client level which will update the clinic agent list in m-IMMS. Although the agent and lot number added will appear in m-IMSM a part of the clinic it will **NOT** be added to the Mass Imms Event in Panorama.

Once the user has selected the (+) they are able to select a new Agent via the type ahead.



1. Immunizing Agent – The agent that is being added. This field is a type a head and is case sensitive so user must type in the agent correctly in order for it to be displayed. The type a head will display 5 agents at a time so user is encouraged to type in the specific agent they would like to add. Note – unspecified agents will also appear in this list.
2. Lot Number – A list of available lot numbers for the agent that has been entered. This field is a scroll picker. If the lot number does not appear please follow the regular Panorama process to have the lot number added. Trade name and manufacturer will be populated based on the lot that was entered.
3. Route – A list of available routes will appear in a scroll picker.

4. Reason – A list of Reasons for immunization will appear in a scroll picker.
5. Done – By selecting done the newly added agent will now appear on the Administer Immunizations screen.

Consent Required for New Agent Prior to Immunization

An error message will appear if the new agent is selected prior to adding the consent record.

Also not if a user moves into another client record and returns to this client the newly added agent will no longer appear and must be added again.

Missing Reason for Immunization

Reason for immunization must be entered when adding a new agent/lot number to the administered immunization screen in a client's record. If the reason is not entered upon upload to Panorama an error message will appear "Upload Failed. Duplicate Special Considerations." This issue will be corrected in the new release of m-IMMS scheduled for November 20, 2017.

Clinic Details ( )

Once a new agent has been added to a client's record and the immunization administered the newly added agent will appear in the clinic details screen in m-IMMS.

No SIM 6:29 PM 6%

Back Test clinic Sept LK Details

Clinic Details

ID	236791
Title	Test clinic Sept LK
Date(s)	2017 Sep 19 2017 Sep 28 2017 Oct 31
Location	Grey Bruce Main Office
Address	101 17th Street East Owen Sound N4K0A5
Type	Routine
Number of Clients	22
Downloaded	2017 Oct 02
Created By	Nikulina, Mila

Immunizing Agents

AGENT	LOT NUMBER	TRADE NAME	DOSAGE	ROUTE	REASON	REQUIRED
HB	OLEG2AHBVC100BK Expires 2018 Dec 30	HB Engerix B GSK	0.5 mL	Intramuscular: IM	Routine	4
HPV-4	J015686 Expires 2018 Apr 09	HPV-4 Gardasil MC	0.5 mL	Intramuscular: IM	Routine	4
Men-C-ACYW135	N-U5103BG Expires 2017 Nov 16	Men-C-ACYW135 Men...	0.5 mL	Intramuscular: IM		

The agent has been added to the m-IMMS clinic details however, will NOT be added to the agent list when uploaded back into Panorama as it was not a part of the original clinic.

The agent will also be added to the dashboard and the Administered count will update once the vaccine is administered.

Post-Clinic:

- Upload clinic data to the Panorama production environment as soon as all information has been collected from the specified clinic.
- PHUs should use a secure internet connection (as per PHU policy) when uploading data back to the Panorama production environment
- Once a clinic has been uploaded, users should manually delete the clinic in m-IMMS as per PHU policy.

Deleting a Clinic

- Deleting a clinic can only be done once all information has been uploaded to Panorama. In order for the end user to delete the clinic the user must swipe the left on the clinics screen, a red delete will appear. Once the user selects the delete the clinic will be no longer appear in the clinic list.

Best Practice Recommendation: For Uploading Clinic Information

Clinic information should be uploaded as soon as possible once a secure connection is available.

3.3 Functionality

Support – Features

- Walkthrough has been added so that user can review the initial tutorial that would be displayed upon opening m-IMMS for the first time.
- Tip of the Day – This will allow users to scroll through tips that are in the user guide and tips sent in by PHU users.
- What`s New – This will provide the user with all new features that have been added in the latest release.

Consent for Disclosure

An icon will now be displayed in the client list if a consent block is in place for the client. This was added so that users will know if a consent block is in place for the client.

Additional information related to the Consent for Disclosure can be seen on the Consent screen.

View Suspensions

An icon will be displayed next to the client list if the client has an active suspension. Additional information about the suspension can be found on the Immunization Assessment screen.

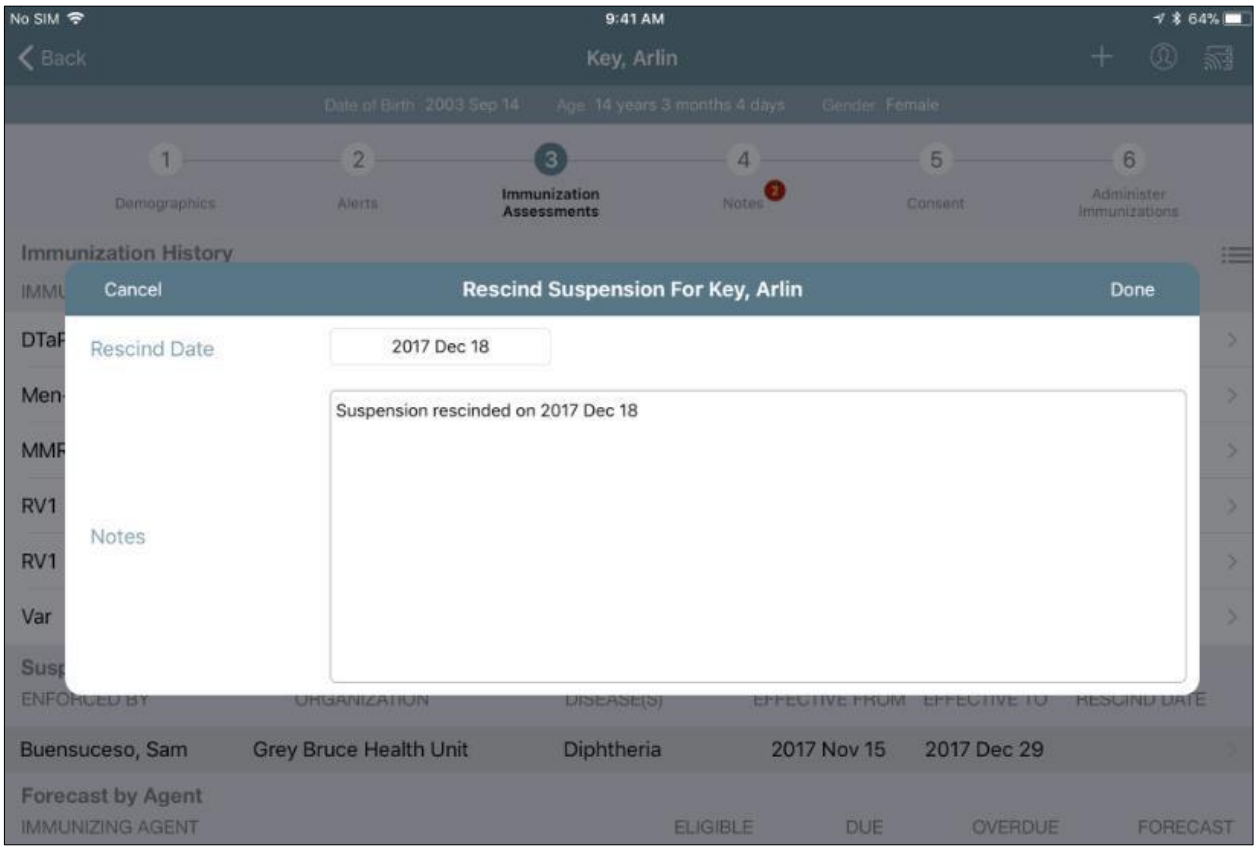
View Suspension Information

Additional information about the suspension can be found on the Immunization Assessment screen.

3.4 Functionality

Rescind Suspensions

On the Immunization assessment page the user can tap on the Suspension Information in order to rescind a suspension. All inactive and active suspensions will appear within the suspension information section. The user can tap on the suspension they would like to rescind and a modal will appear with the current date (can be changed) and the option to add additional information to a note.

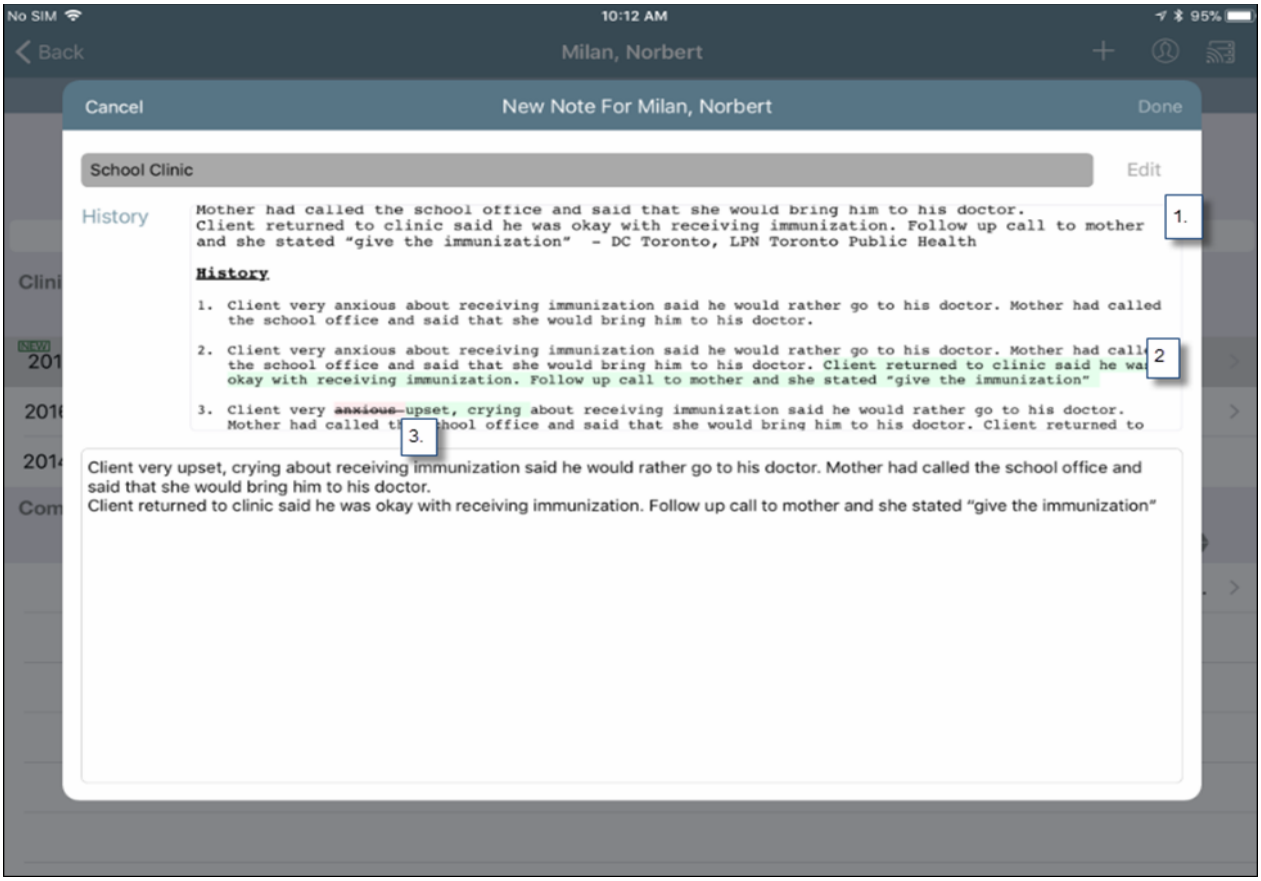


Suspension Icon on Client List

The suspension icon on the client list will continue to appear based on the date however, if you are in a multi-day clinic and are in hybrid mode it will disappear next time you go into the client's record. For example the suspension was rescinded on December 17th the icon will disappear on December 18th if the user re-enters the clients record.

Editing Clinical Notes

Clinical notes can now be edited in m-IMMS as long as the note has **not** been uploaded to Panorama. Once the note has been uploaded to Panorama the only way to edit the note would be via Panorama.



Once a note has been created the user is able to tap on the clinical note that they would like to edit a new modal will appear.

1. The subject line is greyed out as this is not editable. The original note will appear in the history section. The note that was created appears in an editable text box below. The user is able to add additional information to the note or correct previously entered information.

2. If additional info is added the newly enter info will appear highlighted in green once done is selected.
3. If information is removed from the note the information removed will have a strike through once done is selected.
4. If user is in hybrid mode once the client record is exited the info will be uploaded to Panorama and no longer editable in m-IMMS.

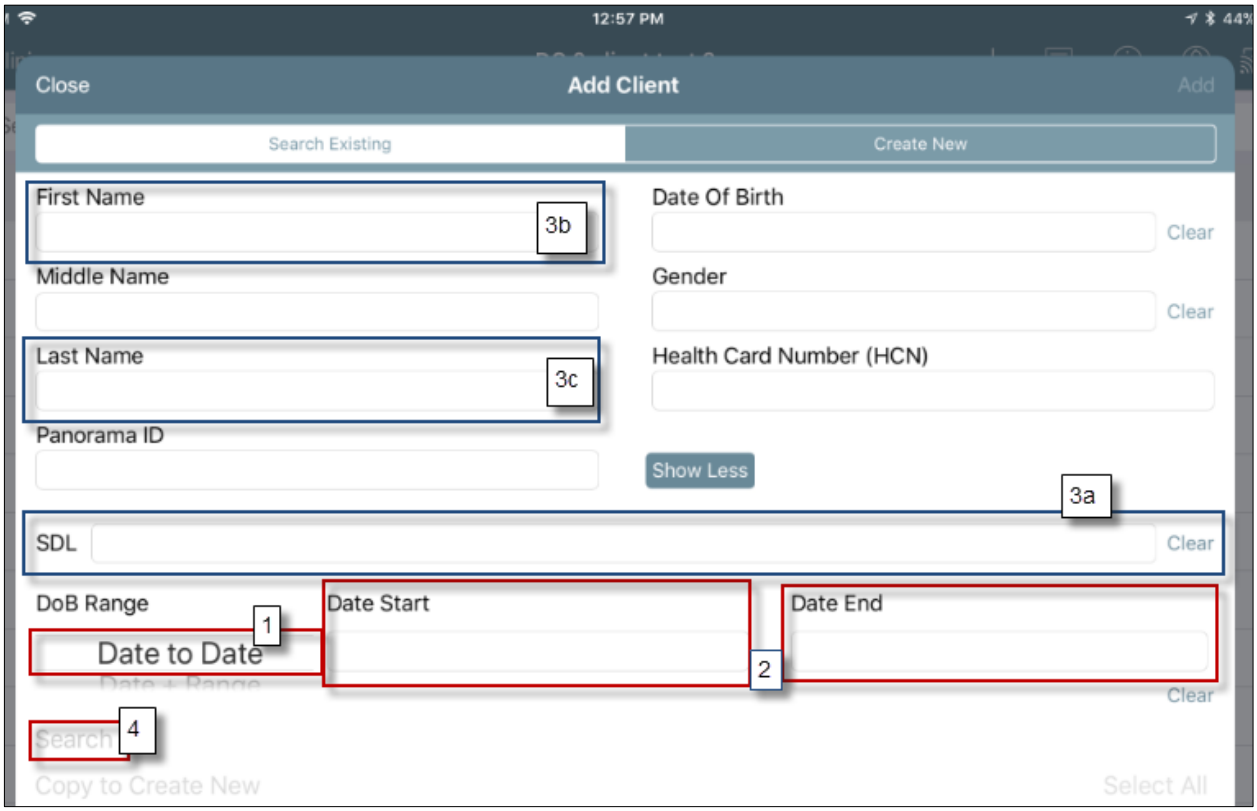
Character Limit for Notes

There is a 5000 character limit on notes in m-IMMS if the limit is reached users will need to create a new note to complete the documentation.

4.0 Functionality

Advanced Search

m-IMMS client search functionality has been extended to support advanced search capabilities which includes Date of Birth or Age ranges and Service Deliver Location. This functionality allows for users to add multiple clients to a clinic 'shell' that was created in Panorama.
Users can access this new functionality via the ( ) on the client list screen and selecting the 'Show More' option.



1. For advance searches user must select one of the following options:
    a. Date of birth range (DoB Range)
    b. Age range
2. For DoB range users are required to enter a start date and an end date
   For Age Range users are required to enter a age to start the search and an age to end the age search
3. When search with a range users are required to enter the following – Conditional Mandatory fields:
    a. SDL – Service Delivery Location (currently school info only and PHU offices)

       OR

    b. First name
    c. Last Name
4. Select 'Search'

A list of clients will be returned based on the search criteria and an option to 'select all' to have the returned clients added into the clinic.

Canadian Granular Addresses

Canadian address entered in m-IMMS for new clients will now be saved in Panorama and PHIX in granular form.

5.0 Functionality (Compatibility with Panorama 3.1)

Features:

Special Considerations – new functionality: Download as per Panorama 3.1.

Ability to add Special Considerations based on Agent

Special Considerations created with agent are now saved as agent and no longer broken down to antigens

Special Considerations list now reflect Agent/Antigen/Disease type

Fixes

- Client warnings displays the Effective to date if available on the details pop up
- Clinical notes that have been created in m-IMMS with long sentences will appear correctly in Panorama
- Client details are populated with the clients' first/last name when creating Communication Event Logs from m-IMMS (through admin/data entry clerk role)
- Historical imms entered in m-IMMS with date and no time was being uploaded into Panorama as time 00:00 EST. Time is now blank in Panorama.
- Updated calendar date picker user interface to show that year can be scrolled
- Daylight savings time fix – time recorded was 1 hour off for historical imms and consents now corrected
- Security Manager now includes the version of the application

5.1 Functionality

User Info and Application Info ( )

The user/application info icon contains user info, support information which includes the following:

- Walkthrough – m-IMMS Screen swipe through
- Tutorial Playlist – A series of videos which shows the functionality in m-IMMS
    - Immunizing a Client
    - Create a Note
    - Search and Create a Clinic
    - Add Historical Immunization
    - Add Agent, Consent and Immunize Client

- Add Alerts
- Settings and Server Status
- m-IMMS Information Buttons
- Application Status
- Closing Clinic

- Tip of the Day – Helpful tips using m-IMMS provided by PHU users
- What's New – Release notes highlighting new functionality and fixes
- About – Application and Server Versions

Defects Fixed in 5.1 Release

Issue	Work Around	Fix
Editing A Clinical Note Created in m-IMMS Clinical notes that are created in m-IMMS and then edited are not able to be uploaded to Panorama. (red bubble appears)	Do not edit any clinical notes in m-IMMS. If a correction is required, this can be done via Panorama directly. **Or** Create a net new note in m-IMMS with the new information	Issue has been fixed and will be a part of the next m-IMMS release scheduled for October 20, 2018
Agent/Tradename Dosage Blank Upon Download to m-IMMS Agent /Tradename dosage appears in Panorama however, upon download to m-IMMS dosage does not always appear. This results in the m-IMMS user not being able to document the immunization that was administered as it is not display on the Administer Immunizations screen.	Upon download of the clinic to m-IMMS users are encouraging to check the Administer Immunizations screen or the Immunizing Agents section of the Clinic Information to ensure dosage appears. If the dosage does not appear delete the clinic and try to redownload. **Or** Delete the agent/tradename from the clinic in Panorama and add the agent via the Administered Immunization screen by tapping on the + button and filling in the required information.	Issue has been fixed and will be a part of the next m-IMMS release scheduled for October 20, 2018

Release 5.1.2 June 24, 2019

The following changes have been deployed as part of 5.2 release:

1. **Updated immunization terminology to align with the Canadian Vaccine Catalogue**
    a. The site of administration drop down list will now appear alphabetically.

2. **Duplicate Immunization Entry**
    a. m-IMMS will check to ensure that the immunization being documented has not been previously entered during the clinic. If the immunization has already been documented during the clinic a message will appear informing the user of a duplicate immunization and will not allow the user to re-enter the same immunization.

3. **Address Entry Update**
    a. Street Number is limited to 6 digits
    b. Unit Number is limited to 5 digits
    c. PO Box is limited to 10 digits

4. **Rescind Suspension Date**
    a. Users will be able to enter a rescind date prior to the suspension date.
    b. Users will not be able to enter a rescind date after the suspension date has expired.

5. **Communication Event Logs (CELs)**
    a. Users will be able to add comments in Panorama to new CELs created in m-imms
    b. For earlier created CEL records without comments in order for new comments to be added a script will need to be run (date will be communicated later).

6. **New Client Created in m-IMMS and Uploaded via PHIX Missing Provider Info**
    a. Provider information; name, designation, and PHU will now appear on the immunization record for new clients in Panorama.

7. **m-IMMS Security Token**
    a. User roles will be checked on the creation of the m-IMMS security token. In order for a token to be created the user must have one of the following Panorama role:
        i. Clerk Public Health Imms
        ii. Immunization Full Administrative
        iii. Immunization Full Clinical

iv. Immunization PHU Superuser
v. Immunization Provider

b. Ontario Logo has been updated

Release 5.2.129 October 2019

1. Users on iOS 13 that require a new m-IMMS security token can now successfully download the token.
   The process to create a new token has changed in iOS 13 or higher. Please refer to the m-IMMS user guide for the complete instructions on creating a token.
   **Important to remember to clear the phdp file from download list once the token has been successfully created.

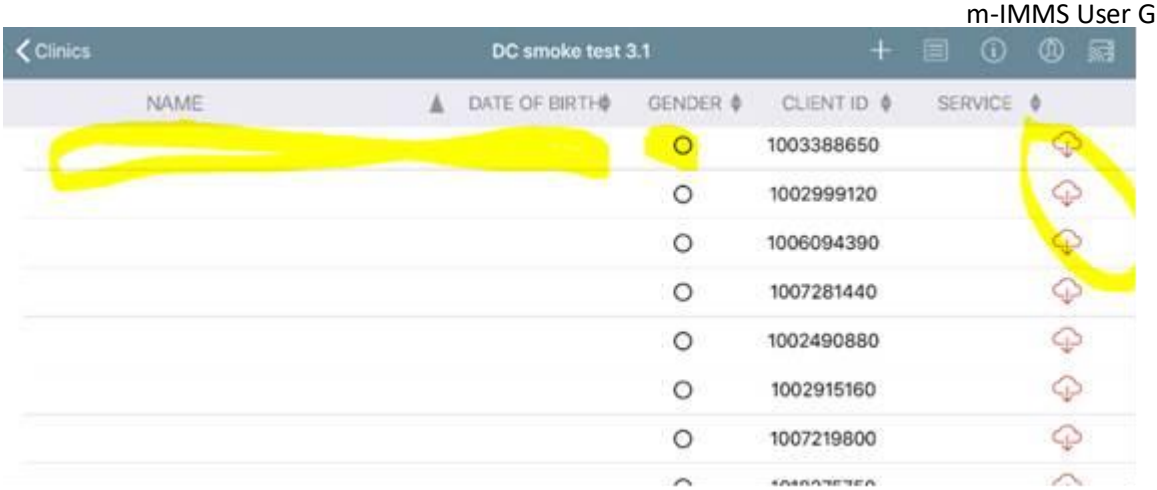
2. Immunization status O (override) is showing correctly in m-IMMS.

3. Revised dose that was displaying in m-IMMS has been removed . Immunization assessment screen and history is now appearing as per Panorama.

4. Agents that were appearing as N/A in the immunization assessment screen are now being correctly displayed. An example of this type of agent is a deprecated agent which means that the concept is no longer being used but may have been previously associated to a client's record. Example: men-AC-unspecified.

5. Tip - If during the use of m-IMMS you see a blank screen or you have shut your cover and the application has timed out scan your register fingerprint over the home button to enable m-IMMS. This has been noted as an issue with the iOS 13 or higher. The team continues to work on this issue.

6. Tip – If you see the following screen:



Users should attempt to redownload the clinic or tap on each red icon to redownload the clients record successfully.

7. Adding Influenza during a clinic - List of immunization agents that can be added in the administered imms screen currently does not include regular influenza only inf-unspecified therefore
   Lot # and trade can not be added.
   Workaround **-** If influenza will be provided at the clinic add at the time of clinic set up. Or If user is Hybrid mode influenza agent and lot can be added in Panorama and will be added
   in m-IMMS once update has been entered. Once added influenza will be available for any client in the clinic.

Release 5.3.133 December 16, 2019

Release Notes for m-IMMS application 5.2.1 (49) and server version 5.3.133.

m-IMMS application:

1. Adding new clients
   - Address type: Home and work only. Temp address removed.
2. Client Demographics – Hybrid Mode
   - Demographic changes that occur in Panorama will now update on first client download in Hybrid mode.
3. Communication Event Logs (CEL)
   - Comments will now be fully displayed for all CEL's.

4. Support Desk Contact Information Updated
5. Public Health Solutions Support Desk number 1-866-272-2794
6. Face ID
    - For iPads that have Face ID this feature is now available to be used in m-IMMS.

Security Token:

1. Help section updated with new steps for creating a m-IMMS security token.

New Clients entered in m-IMMS and uploaded via PHIX:

1. Clients Uploaded via PHIX Address End Dates
    - If address for client from m-IMMS is added via PHIX and is the same address type it will now expire the previous address of the same type.
2. Audit Records for m-IMMS Clients Uploaded via PHIX
    - Guardian information uploaded from PHIX via m-IMMS will now have an audit record associated to information.
    - Audit record will now be created for any updates to client demographics that occur via PHIX.

Client Merge of a m-IMMS client:

1. If a client has been merged in Panorama all information that is entered in m-IMMS for this client will now become a part of the Destination clients record.

Release 5.3.1 January 31, 2020:

1. iOS Version Checks:

- iOS version checks will occur upon log into the application
- Warning message will be displayed if the iOS is not running on the latest "*major*" version
- Warning message will appear 4 times requesting users to update to the latest iOS version
- On the 5th attempt to access m-IMMS without updating to the latest iOS version users will be forced to update in order to use the m-IMMS application

2. Duplicate immunization entry on same day:

- Error message will appear informing the user that the immunization is a duplicate and will not allow the user to re-enter the immunization.

NEW Release 5.4 March 23, 2020:

1. **Deleting the m-MMS Security Token Submission Reference Number**

- Downloaded security tokens may be stored on the iPAD or in icloud.
- m-IMMS users **must** delete downloaded tokens.
- For instructions on how to delete the security token please see the "Help" section on the Public Health Delivery Platform screen or the m-IMMS User Guide.

2. **Submission Reference Number**

- New clients that are created using m-IMMS will have a submission reference number created upon save.
- Submission Reference number will be displayed on the "Client List" and "Demographics" screens.

3. **Creating New Client – City and SDL Refresh**

- On the create "New Client" screen a refresh button is displayed by the City or SDL field. If the type a head is not displaying the desired City or SDL click the refresh button to refresh the list.
- Users must be connected to the internet in order for the refresh to be completed.

4. **Audit Events are Logged for Token Creation**

- Audit event is created each time a user creates a new Security Token in order to access m-IMMS.

5. **Users Able to Provide Crash Logs**

- Users will now be able to send crash logs to the Ministry in order to complete analysis and determine the issue that caused the m-IMMS application to crash.
- For analysis and review to take place before the developing a way for crash logs to be sent to the Ministry users would have to send in the ipad to determine the cause of the crash.

Release 5.4 FIXES

1. Relationships with the expiry date = to today will not be displayed in m-IMMS.
2. PEAR will now display the proper time when minutes are 00.
3. Clinical note wrapping issue that occurs in Panorama has been resolved.

4. Issue where clinic was not opening in m-IMMS due to a “bad data” in a clients’ record has now been fixed.

Section B: m-IMMS Data Dictionary

Clinic List Screen

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
ID	Pre-populate	From Panorama	Unique ID number assigned to the clinic (Mass Imms Event).
Title	Pre-populate	From Panorama	The title of the clinic.
Date(s)	Pre-populate	From Panorama	The date(s) that the clinic is held on.
Clients	Pre-populated	From Panorama	The number of clients in the client list attached to the clinic.
Downloaded	N/A	System-generated	Date the clinic was downloaded to m-IMMS.
Plus sign ( )	N/A	Button	Allow users to review and select clinics for download to m-IMMS if users have internet connectivity. Users will only be able to see and download the clinics that are created by their PHU, have an Open status, and have today or future clinic dates.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user’s account is associated with. Also provides option for user to log out of m-IMMS.
Setting Icon ( )	N/A	Button	Shows the Panorama Environment m-IMMS is connected with. Support contact information. About, copyright, version of the m-Imms application and the version of the Server.
Right arrow (>) beside Status Column	N/A	Button	Indicates that there is data on the next screen.

Clinic Dashboard ( )

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Download ( )	N/A	Button	Allows users to download clinic data from Panorama that may have failed to download the first time. *Note for this button to be active at least one record failed to download from Panorama.
Upload ( )	N/A	Button	Allows users to upload clinic data to Panorama once users have completed collecting clinic data. *Note for this button to be active data has been entered for at least one record and needs to be uploaded to Panorama.
Total Number of Clients	Pre-populated	From Panorama	The number of clients in the client list attached to the clinic.
Download Failed	N/A	System Generated	The total number of records that failed to download from Panorama.
Download Succeeded	N/A	System Generated	The total number of records that were successfully downloaded from Panorama.
To Upload	N/A	System Generated	The total number of records that new information has been entered and require upload to Panorama.
Upload Failed	N/A	System Generated	The total number of records where upload to Panorama failed.
Upload Succeeded	N/A	System Generated	The total number of records that were successfully uploaded to Panorama.
Upload Review	N/A	System Generated	The total number of records that were uploaded to Panorama however, information uploaded needs to be reviewed.
Absent	N/A	System Generated	The total number of clients scheduled to come to the clinic but did not show up. PHUs should follow local policies.
Needed	N/A	System Generated	The total number of clients required to be assessed based on forecast status for any of the immunizing agents offered at the clinic.
Not Needed	N/A	System Generated	The total number of clients who do not require clinic services. This value is automatically set if the client has one of the following: consent refusal for the immunizing agent offered at the clinic; active exemption; active contraindication; Up-To-Date forecast
Provided	N/A	System	The total number of clients seen at the clinic. This status

		Generated	will automatically be selected when new data is entered in m- IMMS, such as a new Alert or Clinical Note.
Immunized	N/A	System Generated	The total number of clients immunized during the clinic. This status will be automatically be selected if an immunization was provided during the clinic.
Agent	Pre-populated	From Panorama	The immunizing agent(s) used at the event.
Trade Name	Pre-populated	From Panorama	The product name of the immunizing agent, which is based on the selected lot number set up for the clinic.
Lot Number	Pre-populated	From Panorama	The unique lot number of the immunizing agent used at the clinic. *Note that the expiration date will display below the lot number
Count	N/A	System Generated	The total number of immunizations administered during the clinic.

Clinic Details (ⓘ)

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
ID	Pre-populated	From Panorama	Unique ID number assigned to the clinic (Mass Imms Event).
Title	Pre-populated	From Panorama	The title of the clinic.
Date(s)	Pre-populated	From Panorama	The date(s) that the clinic is held on.
Location	Pre-populated	From Panorama	The physical address where the clinic was held.
Address	Pre-populated	From Panorama	The address of the clinic. This is based on the address provided to the Panorama Service Desk when the ORG/SDL is setup in Panorama.
Type	Pre-populated	From Panorama	The type of clinic held.
Number of Clients	Pre-populated	From Panorama	The number of clients in the client list attached to the clinic.
Downloaded	N/A	System Generated	Date the clinic was downloaded to m-IMMS.
Created By	Pre-populated	From Panorama	The Panorama user who created the clinic (Mass Imms Event) in Panorama.

Agent	Pre-populated	From Panorama	The immunizing agent(s) that will be used at the event.
Lot number	Pre-populated	From Panorama	The unique lot number of the immunizing agent used at the clinic. *Note that the expiration date will display below the lot number
Trade Name	Pre-populated	From Panorama	The product name of the immunizing agent, which is based on the selected lot number set up for the clinic.
Dosage	Pre-populated	From Panorama	The volume per dose associated to the vaccine product, which is based on the selected lot number set up for the clinic.
Route	Pre-populated	From Panorama	Route is the way the vaccine is administered to the client.
Reason	Pre-populated	From Panorama	The reason for administration of the immunization.
Required	Pre-populated	From Panorama	The number of doses required for the clinic based on the forecast status of the client list. Note that the required number will show per immunizing agent. If there are two or more lot numbers for the same immunizing agent, each lot number will have the same number of doses required.
Provider ID	Pre-populated	From Panorama	The unique identifier assigned to the provider account in Panorama.
Name	Pre-populated	From Panorama	The name of the provider who is an immunizing nurse at the clinic. The format is Last Name, First Name.
Designation	Pre-populated	From Panorama	The professional designation of the provider.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Client List Screen

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Search by Name	N/A	Search	Allows users to search by client first or last name. As users type characters, the client names narrow down on the list. Only searches the Name column.
( ) Clinic Details	N/A	Button	Provides information of the specified clinic. See Clinic Details screen for further definitions.

Name	Pre-populated	From Panorama	The client's first and last name. The format is **Last Name**, First Name.
Date of Birth	Pre-populated	From Panorama	Client's date of birth. Format is YYYY Mon DD.
Gender	Pre-populated	From Panorama	Client's gender. Icon symbol indicates the follow: • Male - ♂ • Female - ♀ • Other, Undifferentiated, Unknown - ○
Client ID	Pre-populated	From Panorama	Panorama Client ID.
Service			Offers guidance to users on whether a client should be assessed by an immunizing nurse at the clinic. When users download the clinic to m-IMMS, they will see four statuses in this column. Users have the option to manually update the value. • *Absent*: the client was scheduled to come to the clinic but did not show up. PHUs should follow local policies. • *Needed*: defined as client needs to be assessed based on forecast status for any of the immunizing agents offered at the clinic • *Not Needed*: client does not require clinic services. This value is automatically set if the client has one of the following: consent refusal for the immunizing agent offered at the clinic; active exemption; active contraindication; Up-To-Date forecast • *Provided*: client has been seen. This status will automatically be selected when new data is entered in m- IMMS, such as a new immunization record or Clinical Note.
Right arrow (>) beside Status Column	N/A	Button	Indicates that there is data on the next screen.

Demographics

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Client ID	Pre-Populated	From Panorama	Panorama Client ID
Name	Pre-Populated	From Panorama	The client's first and last name. The format is **Last Name**, First Name.
Date of Birth	Pre-Populated	From Panorama	Client's date of birth. Format is YYYY Mon DD.
Age	Pre-Populated	From Panorama	Client's age based on the difference between today's date and the date of birth. Displays the year, month, and day.
Gender	Pre-Populated	From Panorama	Client's gender. • Male • Female • Other, Undifferentiated, Unknown
Health Card No.	Pre-Populated	From Panorama	Client's Ontario health card number. In m-IMMS, the number will only display if it is set to the Ontario type in Panorama.
Phone Number	Pre-Populated	From Panorama	Displays all active telephone numbers listed for the client. Each number will display the phone type.
Address	Pre-Populated	From Panorama	Displays the client's active address set with the Preferred flag. If the client does not have a Preferred flag set, m-IMMS will select to display the active address with the most recent Effective From date.
Guardian	Pre-Populated	From Panorama	Displays all active, non-indexed guardian records that have the Custodial flag selected.
Plus Sign ( )	N/A	Button	Out of scope. Allows users to add/update the client's demographic information.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Alerts

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes

Warning Message	Pre-populated	From Panorama	Content of the Client Warning. Only displays the first sentence of the message. Unlike Panorama, the Special Consideration Type warnings are not displayed.
Effective From	Pre-populated	From Panorama	The date the warning(s) first became effective or was entered in Panorama (start date).
Message (Warning modal/pop up)	Pre-populated	From Panorama	Displays full message of the Client Warning.
Recorded by (Warning modal/pop up)	Pre-populated	From Panorama	The name of the user who created the warning and the PHU that the user belongs to.
Exemptions Diseases	Pre-populated	From Panorama	The disease associated to the exemption record based on the antigen selected in Panorama. Note that the disease column does not distinguish for which antigen was selected if multiple antigens map to the same disease. For example, if the exemption record was created for Men- C-C, the disease column will state "Meningococcal disease". Users may misinterpret this as an exemption for Men-C-ACYW135 as well. Users should review the client's immunization history and forecast sections to confirm which antigen(s) the exemption record pertains to.
Exemption Reason	Pre-populated	From Panorama	The reason for the exemption.
Effective From	Pre-populated	From Panorama	The start date of the exemption.
Contraindications Antigen	Pre-populated	From Panorama	The antigen for which a contraindication has been entered.
Contraindications Reason	Pre-populated	From Panorama	Reason for contraindication.
Contraindication Effective From	Pre-populated	From Panorama	The date the contraindication first became effective or was entered in Panorama (start date).
Precaution Antigen	Pre-populated	From Panorama	The antigen for which a precaution has been entered.
Precaution Reason	Pre-populated	From Panorama	Reason for precaution.
Precaution Effective From	Pre-populated	From Panorama	The date the precaution first became effective or was entered in Panorama (start date).
Immunizing Agent - Deferrals	Pre-populated	From Panorama	The immunizing agent for which a deferral was created in Panorama.

Reason – Deferrals	Pre-populated	From Panorama	The reason for which a deferral record was created in Panorama.
Effective From – Deferrals	Pre-populated	From Panorama	The date the deferral first became effective or was entered in Panorama (start date).
Effective To Deferrals	Pre-populated	From Panorama	The last day that the deferral is effective (end date).
Recorded By (modal/pop up)	Pre-populated	From Panorama	The name of the user who created the warning and the PHU that the user belongs to.

Alerts – Drill-Down for Special Considerations

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Effective To	Pre-populated	From Panorama	The last day that the Special consideration is effective (end date).
Source of Evidence	Pre-populated	From Panorama	The source used to determine if a special consideration is valid.
Reason for the Special Consideration	Pre-populated	From Panorama	Reason for the special consideration.
Comments	Pre-populated	From Panorama	Other details about the special consideration.
Recorded By	Pre-populated	From Panorama	The name of the user who created the warning and the PHU that the user belongs to.

Creating New Client Warnings

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Effective From	Yes	Pick List (Defaulted to today's date can be updated)	The date the warning is valid from (start date).
Effective To	No	Pick List	Date which the warning is valid to. (End Date)
Message	Yes	Free Text	The information associated with the warning. Information should not contain personal health information.

Creating New Special Considerations

Exemptions

Exemptions can only be created for diseases mandated under *Immunization of Schools Pupil Act*, 1990 (ISPA). Users can only create an exemption record if there is a valid medical exemption form (for medical exemptions) or affidavit (for philosophical exemptions) on file. Upon return to the office users should upload either the signed Statement of Medical Exemption form or Statement of Conscience or Religious Belief form as a context document and linked to the specified client.

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Disease(s)	Pre-populated	From Panorama	The disease(s) associated to the Exemption. Only diseases that are mandated under ISPA can be selected. • Diphtheria • Pertussis • Tetanus • Poliomyelitis • Measles • Mumps • Rubella • Varicella • Meningococcal *Note – All non-ISPA diseases will be greyed out.
Reason	Yes	Pick List	Reason for Exemption: ➢ ***Medical – clinical decision*** Public health professional determined that the client should not to receive any vaccines or certain vaccines (e.g. live vaccines) due to medical condition, therapy or medications (e.g. cancer, allergy). Select if the medical exemption form was submitted and has the "Contraindication – Detrimental to health" checked. ➢ ***Medical – clinical record of disease*** Public health professional has documented that the person was diagnosed with having a particular disease and not able to test for immunity. Select if the medical exemption form was submitted and has the "Immunity – Clinical diagnosis of prior disease"

			checked. ➢ ***Medical – documented immunity*** Laboratory testing serves as proof that the client is immune to a particular disease and long term/life-long immunity occurs after naturally occurring infection (e.g. chickenpox, measles). Select if the medical exemption form was submitted and has the "Immunity – Laboratory confirmation of immunity or prior disease" checked. ➢ ***Philosophical reason – refusal*** The client or parent/legal guardian submitted a Statement of Conscience or Religious Belief form for ISPA disease(s) or for the mandated disease(s) as per the Child Care and
Effective From	Yes	Pick List (Defaulted to today's date can be updated)	The date that the exemption is valid from. (start date) PHUs should either use the date on a form, if one is submitted, or the date that the exemption was reported.
Effective To	No	Pick List	The date the exemption is valid to. (end date) ➢ ***CCEYA exemptions:*** First day of September of the year that the client turned 4 years old. This is a required field. ➢ *ISPA Philosophical Refusal exemption:* The date the client turns 18 years of age. ➢ *Medical exemptions:* Users can use the end date identified for the specific reason. For other medical exemptions where the client has a permanent medical condition, this field should be left blank. *Note that the Effective To dates for exemptions impact a client's forecaster. Users should consider the importance of the Effective To dates if they want to pull clients in a Reminder/Recall query for population surveillance
Source of Evidence	Yes	Pick List	The source used to determine if an exemption is valid.
Notes	No	Free Text	Any additional information that user would like associated to the exemption.

Contraindications

If the immunizing agent cannot be administered to the client because the health risk outweighs the benefit(s). Users should select if this is outlined as a contraindication in the product monograph or in a medical directive provided in their PHU.

Precautions

If the client receives an immunization but may be at an increased risk of an Adverse Event Following Immunization (AEFI). If the benefit of immunization outweighs the risk, users should administer the vaccine and record a precaution. Users should also create a precaution record if it is outlined in the product monograph or in a medical directive in their PHU.

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Immunizing Agent(s)	Pre-populated	From Panorama	Select the immunizing agent or antigen associated with the Special Consideration.
Reason	Yes	Pick List	***Contraindications:*** ➢ ***Guillain-Barre Syndrome (GBS)*** Client developed GBS within six weeks after receiving a particular vaccine (e.g. Td vaccine, influenza). ➢ ***Immunosuppressed*** The vaccine is contraindicated due to medical condition, therapy or medication causing immunosuppression (e.g. live vaccines). ➢ ***Other (specify)*** Select this value if no other value meets cause of contraindication. If this option is selected user must enter additional information in the reason field. ➢ ***Pregnancy*** Client cannot receive live vaccines due to risk to fetus. Users can also select if the vaccines not studied in pregnancy and the client is not high risk and can wait to receive the vaccine after delivery. ➢ ***Previous Adverse Event following immunization*** The client had an adverse event where revaccination or further vaccination is not recommended.
Effective From	Yes	Pick List (Defaulted to today's	The date that the special consideration is valid from. (start date) PHUs should either use the date on a form, if one is submitted, or the date that the exemption was

		date can be updated)	reported.
Effective To	No	Pick List	Date which the special consideration is valid to. (End Date) ***Contraindications:*** The end date that has been identified for the specific reason. This date could indicate pregnancy, immunosuppression. *Note that the Effective To dates for contraindications impact a client's forecaster. Users should consider the importance of the Effective To dates if they want to pull clients in a Reminder/Recall query for population surveillance
Source of Evidence	Yes	Pick List	The source used to determine if a Special Consideration is valid.
Notes	No	Free Text	Any additional information that user would like associated to the special consideration.

Creating New Deferrals

m-IMMS Field Name	**System Required**	**Type of Field**	**m-IMMS Definition and Notes**
Immunizing Agent(s)	Pre-populated	From Panorama	Select the immunizing agent associated to the deferral.
Reason	Yes	Pick List	The reason for the deferral: ➢ ***Client Refused*** For school-aged clients, when the parent/legal guardian provides consent but the client refused at point of service ➢ ***Extended Absence*** A client is considered to be on extended absence if he or she will not be in attendance at the clinic and will need to wait until the next round. Ex. Client is out of the country for longer than the minimum interval for the next dose of the specified vaccine. ➢ ***In Progress*** A client who does not receive the vaccine because he or she does not meet the scheduling timeframe but still intends to receive the vaccine when eligible. ➢ ***Other***

			If users select Other the system will require the user to enter in a reason. ➢ ***Temporary Deferred*** (client is sitting with you) Users should select this option based on reasonable judgment that the client was temporarily unable to receive immunization but still intends to receive the vaccine. Ex. Fire alarm during clinic forces the clinic to end before the client could receive vaccine. ➢ ***Temporary Medical Condition*** A client has a temporary medical condition that prevents the PHU from providing the vaccine that day but the client still intends to receive the vaccine. Ex. Client has a fever ➢ ***Vaccine Supply Issues*** For various issues related to vaccine supply issues, the PHU is unable to administer the vaccine to the client but the client still intends to receive the vaccine. Ex. Cold chain breach
Effective From	Yes	Pick List	The date that the deferral became valid. (Start date)
Effective To	No	Pick List	The date that the deferral became invalid. (End date)
Notes	No	Free Text	Any additional information that user would like associated to the special consideration.

Immunization Assessment

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Immunizing Agent	Pre-populated	From Panorama	The immunizing agent(s) set up in the clinic.
Date	Pre-populated	From Panorama	The date the immunization was administered.
Age	Pre-populated	From Panorama	Age of the client when the immunization was administered. The age will show in years, months, days.
Since Last Dose	Pre-populated	From Panorama	Interval (years, months, days) from the administration date of the previous dose in a multi-dose series for the same immunizing agent. Note that the system will not calculate the Since Last Dose interval for unspecified immunizing agents. Users will need to assess the accurate intervals in this situation.

			PHUs should review the best practice recommendations for historical immunizations in the Panorama Data Standards and Best Practices document (October 2015).
Immunizing Agent – Forecast by Agent	Pre-populated	From Panorama	The immunizing agent that is forecasted.
Eligible – Forecast by Agent	Pre-populated	From Panorama	Generally indicates the earliest time or age that a client could receive an immunologically valid dose of vaccine that could be counted toward series completion (this dose may not necessarily be publicly funded or recommended).
Due – Forecast by Agent	Pre-populated	From Panorama	Indicates the recommended date when publicly funded vaccines are due in Ontario to ensure appropriate protection against vaccine-preventable diseases; these are visible on the client's forecast from birth.
Overdue - Forecast by Agent	Pre-populated	From Panorama	The date the client is supposed to receive a specified immunization passes.
Forecast - Forecast by Agent	Pre-populated	From Panorama	The forecast dates are computed in Panorama. Forecast status is accurate as of the clinic's download date.
Disease – Forecast by Disease	Pre-populated	From Panorama	The disease from which the client needs protection.
Antigen - Forecast by Disease	Pre-populated	From Panorama	The antigen that is forecasted as of download date.
Eligible - Forecast by Disease	Pre-populated	From Panorama	The earliest date that the client is eligible to receive the vaccine (this dose may not necessarily be publicly funded or recommended at this time).
Due - Forecast by Disease	Pre-populated	From Panorama	The date when publicly funded vaccines are recommended in Ontario (according to the Ontario Immunization Schedule) or the date when non-publicly funded vaccines are recommended based on NACI guidelines or product monographs.
Overdue - Forecast by Disease	Pre-populated	From Panorama	For doses of vaccine in a series = due date + 1 month. Exceptions: School- based immunization programs, rapid schedules and influenza vaccines (see the Panorama Ontario Immunization Schedules Logic document for details).
Forecast - Forecast by Disease	Pre-populated	From Panorama	The forecast dates are computed in Panorama. Forecast status is accurate as of the clinic's download date.
Plus sign ( )	N/A	Button	Out of scope. Allows users to add/update the client's immunization profile

Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Immunize Assessment Drill Down

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Immunizing Agent	Pre-populated	From Panorama	The immunizing agent(s) for which the client received a vaccine administration.
Date Administered	Pre-populated	From Panorama	Date of immunization administration.
Time Administered	Pre-populated	From Panorama	Time of immunization administration.
Age at Administration	Pre-populated	From Panorama	Age of immunization administration in years, months, days.
Lot Number	Pre-populated	From Panorama	The unique lot number selected for the administered vaccine.
Trade Name	Pre-populated	From Panorama	The name of the vaccine product administered, which is based on the lot number.
Manufacturer	Pre-populated	From Panorama	The manufacturer of the administered vaccine product, which is based on the lot number.
Dose Number	Pre-populated	From Panorama	The dose number is computed by logic in Panorama based on vaccine series, valid doses, and intervals.
Dosage	Pre-populated	From Panorama	The volume per dose associated to the administered vaccine product, which is based on the lot number.
Site	Pre-populated	From Panorama	The location on the body where the immunization was administered.
Route	Pre-populated	From Panorama	The way the vaccine was administered to the client.
Reason for Immunization	Pre-populated	From Panorama	Reason why the client received the immunization.

Notes

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes

Search	Pre-populated	From Panorama	Allows users to search all Clinical Notes for the client by keyword in the subject line and note body.
Date	Pre-populated	From Panorama	Note date.
Subject	Pre-populated	From Panorama	The subject line indicates the topic of the Clinical Note. Values provided are based on best practices in the Panorama Data Standards and Best Practices document (October 2015).
Note	Pre-populated	From Panorama	Clinical details relevant to the client in context. Users can write up to 4000 characters when entering a new note. Saved notes will only
Message (modal/pop up)	Pre-populated	From Panorama	Clinical details relevant to the client in context. Users can write up to 4000 characters when entering a new note.
Plus Sign ( )	N/A	Button	Allows users to create a new Clinical Note in m-IMMS.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Creating a New Note ( )

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Enter Subject	Yes	Pick List (Can edit if required)	The subject line indicates the topic of the Clinical Note.
Text Box	Yes	Free text	Clinical details relevant to the client the user is working with.

Consents

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Antigen	Pre-populated	From Panorama	The antigen(s) for the immunizing agents entered for the clinic.
Consent	Pre-populated	From Panorama	Indicates whether the consent for the antigen is missing, granted or refused. Note that the "Missing" value is based on whether

			the consent records exists for the antigen. Best Practice(s): PHUs should review the Recorded By column to ensure that the consent is validated by their PHU. This value derives from the ***Consent Directives for Immunization Services*** page in Panorama
Recorded By	Pre-populated	From Panorama	The name of the user who created the consent and the PHU that the user belongs to. This field is blank if the consent is missing.
Effective To	Pre-populated	From Panorama	The last day that the consent record is effective (end date).
Plus Sign ( )	N/A	Button	Allows users to add client's consent records.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Consent Drill Down

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Antigen	Pre-populated	From Panorama	The antigen for the immunizing agents entered for the clinic.
Consent Status	Pre-populated	From Panorama	Indicates whether the consent for the antigen is missing, granted or refused. Best Practice(s): PHUs should review the Recorded By column to ensure that the consent is validated by their PHU. This value derives from the Consent Directives for Immunization Services page in Panorama.
Comments	Pre-populated	From Panorama	Additional information derived from the Comments field of the consent record.
Effective From	Pre-populated	From Panorama	The day that the consent first became effective (start date).
Effective To	Pre-populated	From Panorama	The last day that the consent record is effective (end date).

			If the field is blank, this indicates that there is no expiry date. In some instances, PHUs will leave this field blank if they create consents per dose. *Note that only active consents are displayed.
Consent Given By	Pre-populated	From Panorama	The individual who granted/refused consent on behalf of the client. Note that if the consent was given by an indexed client record in Panorama, this will currently not display in m-IMMS.
Form of Consent	Pre-populated	From Panorama	The method by which consent was obtained.
Consent Given To	Pre-populated	From Panorama	The name of the Panorama user who entered the consent record (the user logged into Panorama).
Recorded By	Pre-populated	From Panorama	The PHU associated with the user who entered the consent record and the user's name.

Creating a New Consent (+)

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Immunizing Agent(s)	Yes	Button	The immunizing agent(s) that the consent should be created for. The agents selected for the clinic will be displayed. Users must select one or more agents (using the circles) in order to create the consent.
Grant	Yes	Sliding Button	➢ **Grant (default)** Client/guardian has given consent for the client to receive the immunization Slide button to create a refusal ➢ ***Refusal*** Client or parent/legal guardian does not provide consent for the client to receive immunization. The system requires users to provide a reason if they select "Refuse": • Immunity • Medical condition • Not required • Other • Philosophical/Conscientious Objection

			• Vaccine Safety Users can enter more details for reason in the notes field if required.
Doses	No	+/- Button	Number of doses that the consent is valid for. Use as per PHU policy. *Note if creating consents for multiple agent's field will be greyed out.
Given By	Yes	Button	The relationship to the client of the individual giving the consent. Use at PHU discretion.
Form	Yes	Button	The form of consent given. Select from the available options: ➢ ***Written*** Written consent was provided ➢ ***Verbal*** Verbal consent was provided ➢ ***Implied*** Do Not Use
Effective From	Yes	Pick List	The date that the client provided informed consent to the PHU administering the immunization.
Effective To	No	Pick List	The date to which the consent directive is effective.
Notes	No	Free Text	Any additional information that user would like associated to the consent.

Administer Immunizations

m-IMMS Field Name	System Required	Type of Field	m-IMMS Definition and Notes
Date and Time Administered	Yes	System Generated (Users can Update)	The date and time the immunization was administered for the selected agent. Note the date value is system-generated based on the clinic date and cannot be changed. The time value is dynamic and captures the current time when the user selects the agent to record the immunization. The time zone defaults to the iPad setup. Users who are in a different time zone should set up their iPad accordingly.
Immunizing Agent	Pre-populated	From Panorama	The immunizing agent(s) set up in the clinic.
Lot Number	Pre-populated	From Panorama	The vaccine lot number associated to the specified immunizing agent offered at the clinic. Note that for the

			first phase of the pilot, the lot number is not fully displayed. Users should validate the lot number accordingly as per internal policies.
Trade Name	Pre-populated	From Panorama	Trade name of the vaccine product as per the lot number selected.
Dosage	Yes	Defaulted from Panorama (Number field)	The default dosage is based on the Panorama inventory setup for the selected lot number. Users can update the dosage if required.
Route	Yes	Defaulted from Panorama (pick list)	The route of administration of the vaccine as per the clinic setup in Panorama. Users can update the route if required.
Site	Yes	Pick List	The location on the body where the immunization was administered. The default value is blank. Users must select the appropriate site from the available list. • Anterolateral Thigh Lt • Anterolateral Thigh Rt • Arm Lt • Arm Rt • Deltoid Lt • Deltoid Rt • Forearm Lt • Forearm Rt • Gluteal Lt • Gluteal Rt • Inferior Deltoid Lt • Inferior Deltoid Rt • Mouth • Naris Lt • Naris Rt • Other • Superior Deltoid Lt • Superior Deltoid Rt • Unknown
Done	N/A	Button	Allows users to save an immunization record in m-IMMS. Only activated once all data fields on the Administer Immunizations screen are completed.

			Once selected, a pop-up message appears confirming that the immunization record has been saved. Users must review the client's profile on the Immunization Assessments screen to validate that the new record was created. This is important because the Administer Immunizations screen will not display a confirmation after users select "OK" on the pop-up message.
Person Icon ( )	N/A	Button	Shows the first and last name of the user logged in and the PHU the user's account is associated with. Also provides option for user to log out of m-IMMS.

Appendix A: m-IMMS Warning and Error Messages

Error Messages

The following is a list of common type of errors that users may experience when accessing the security token for m-IMMS. If users receive an error message that is not listed below, it is likely a technical error that cannot be resolved by the user. Please contact the Panorama Service Desk for further support.

Code	Issue / Error Message	Solution
2011	Connectivity Error – Login Failed Please check your internet connectivity and try again / If the error persists contact technical support.	Check internet connectivity. Open Safari browser and search for a specific web page.
2014	Login Error - Your session has expired	The user must re-login into m-IMMS as there has been more then 10 minutes of inactivity.
2021	Connectivity Error: Retrieving Clinic List Failed Please check your internet connectivity and try again. If the error persists, contact technical support.	The user must re-login into m-IMMS in online mode to retrieve the clinic list from the Panorama database. The user will need internet connectivity to log in online.
2011	Please check your internet connectivity and try again. If the error persists, contact technical support	Retest connectivity open safari browser and search for something online to ensure connectivity.
2031	Connectivity Error: Download Failed. Please check your internet connectivity and try again. If the error persists, contact technical support. Please contact technical support.	The user must re-login into m-IMMSin online mode download the clinic from the Panorama database. The user will need internet connectivity to log in online.

2041	Connectivity Error: Downloading Client Failed Please check your internet connectivity and try again. If the error persists, contact technical support.	The user will need internet connectivity to download the client record. Once internet connectivity is established, the user can tap the red cloud icon to re-download the client record.
2101	Connectivity Error Please check your internet connectivity and try again. If the error persists, contact technical support.	Check internet connectivity. Open Safari browser and search for a specific web page.
2511	Connectivity Error: Uploading Client Failed Please check your internet connectivity and try again. If the error persists, contact technical support.	When uploading client data back to Panorama one or more client records failed to upload. Users will see a red cloud icon with an arrow pointing north next to the client record(s) that failed to upload. Ensure connectivity and select the **Upload** button on the ***Clinic Dashboard.***
3013	Unable to Login Service is not available. Please check network connection. If issue persists call support.	Try reconnecting to Panorama to ensure you have connectivity.
3015	Unable to Login You do not have permission to access m-IMMS. Please contact your PRC.	Contact PRC in order to access m-IMMS.
3201	Consent Not Granted Consent is missing or refused for one or more antigens.	No granted consent. Return to ***Consent*** screen and enter consent. Users can select “OK” in the warning message to go ahead and record the immunization.
3202	Clinic Can Not Be Deleted Or Re-downloaded The clinic contains new records that have not been uploaded to Panorama. Upload the clinic then try deleting or re-downloading it again.	
3203	Lot is expired. The lot number you have selected is expired.	Lot number is expired. To update lot number user will need to do this in Panorama and redownload clinic.
3205	Duplicate Consent Consent for antigen(s) within selected agent currently exists; proceeding will expire existing consent and create new.	Consent exists already for this antigen. If reentered the previous consent will be expired and a new consent created.
3206	Duplicate Deferral Deferral for selected agent and reason currently exists	

3207	Duplicate Immunization An immunization record already exists for the selected agent and was already administered during this clinic.	
3208	Immunization Saved The selected immunization data has been saved	
3209	Add deferral Unable to add deferral, immunization already exists within the effective date range	Immunization for this agent already exists for the agent within the date range therefore unable to create a deferral.
3210	Adding a contraindication/precaution Unable to create contraindication/precaution. Contraindication/precaution record already exists	
3211	Adding Exemption Agent has no ISPA disease.	Unable to create an exemption for this agent as the disease does not fall under *ISPA.*
3212	Adding Exemption Unable to create exemption. Exemption record already exists	
3219	Adding Exemption The client has existing exemptions for at least one of the selected diseases. Exemption record will only be created for disease(s) that have no existing exemption record.	
3511	Upload Warning The client is idle or information in the clients record has changed since downloaded from Panorama to the device. Please review the clients record in Panorama	
3513	Upload Failed The client is active. Technical error	
3512	Upload Failed The client is idle or ID match in Panorama. Technical error	Resolve the offline client in Panorama by bringing the client back online and then trying to re-upload the m-IMMS data. If the only client record that fails is due to a merged client, then users can reconcile the issue by manually entering information from m-IMMS into Panorama.

3514	Upload Failed The client is matched and offine in Panorama. Please bring the client online in Panorama and try again	
3517	Upload Failed Duplicate Special Considerations	
3218	Adding a contraindication/precaution An existing contraindication/precaution for an antigen(s) already exists.	
3219	Adding an Exemption The client has existing exemptions for at least one of the selected diseases. Exemption record will only be created for disease(s) that have no existing	
3220	Changing Client Service Status Client has been immunized or a deferral has been entered status cannot be updated to absent.	
3601	No Token Found Unable to access m-IMMS. You will be redirected to Panorama to generate token. In order to generate token select link Download Security Token for m-IMMS	Ensure connectivity and generate a new token by accessing Panorama.
3602	Token Expired Your security token is invalid/expired. You will be redirected to Panorama to generate token. In order to generate token select link Download Security Token for m-IMMS	Ensure connectivity and generate a new token by accessing Panorama.
3603	User Authentication Failed	iPad passcode incorrect. Touch ID fingerprint not recognized .
3604	Your m-IMMS security token will expire on *DATE*	Security token will expire on *DATE*. Ensure connectivity and generate a new token by accessing Panorama.
3605	Unable to access m-IMMS. You will be redirected to Panorama to generate a new security token by selecting the Panorama link. In order to generate token select link Download Security Token for m-IMMS	Ensure connectivity and generate a new token by accessing Panorama.
3606	Your m-IMMS security token has expired on	User must connect to Panorama to generate a new security token.

3607	You will be redirected to Panorama to generate a new security token by selecting the Panorama link. In order to generate token select link Download Security Token for m-IMMS.	
3608	Enter PIN	Enter your 4 digit PIN that was created when security token was generated.
3608	PIN is incorrect.	PIN number that was created when security token was generated is incorrect please reenter your PIN.

Fixed Defects

Defect Introduced in 4.0 (fixed)

Clerk Role – New clients

Admin role where a NEW client has been created in m-IMMS and uploaded to PHIX an error will occur which will not allow upload into Panorama for the following 2 scenario's:

1. New client with No Panorama match in PHIX
2. New client with match in PHIX and has the exact name match

Workaround

1. Manually create the new client in Panorama but add an 'X' to the first name
2. Reopen the client record in PHIX and select the name from m-IMMS record to replace existing Panorama name

Note – Anytime Admin staff creates an alert, or consent a CEL is automatically created in m-IMMS

Resources and Support:

E-mail: PublichHealthSolutions@ontario.ca

Phone: 1-866-272-2794

Availability: 8AM-5PM, Monday to Friday

The Public Health Solutions Support Desk telephone number also displays in the m-IMMS app settings on the iPad.