

Creating an Immunization Template in MedAccess

This guide outlines the process to build a new template in MedAccess. As per the instructions below, it is necessary to copy the ***Immunization – Panorama (NS)** template. If this template is not copied, immunizations will NOT be shared with Public Health, nor will they be visible in VaxRecordNS/YourHealthNS. Please do not create a new template from scratch or copy other templates.

Notes:

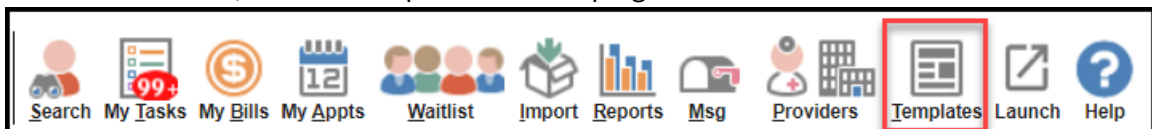
1. Before setting up favourites, decide on a naming convention for the template so it is easy to find and select.
2. Decide if you want to create the template for only documenting vaccines or also create a favorite immunization task that will display both the task and observation details when opened.
3. The new templates can be added as a user favourite, a group favourite or a clinic favourite on the main template management page on the far-right hand side (the hearts). If you hover over them, they will indicate which favourite you are selecting.



4. This is set up as a Response Template. Most templates in MedAccess have a Request and Response Template. They look the same in the system for **Immunization – Panorama (NS)** except that one is set up with Request. The Request template would be for prescribing the immunization vaccine. The Response template is for documenting the immunization.
5. Below is the process to set up the immunization template, add it to a patient visit and also a process to set up a task template that includes the favourite immunization template.

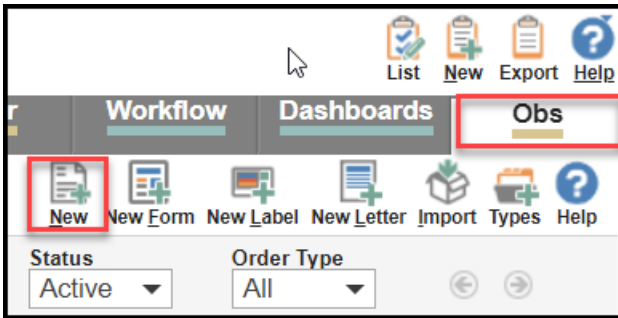
Setting up an Immunization Template

1. Log in to MedAccess
2. On the Dashboard, click on Templates in the top right-hand corner

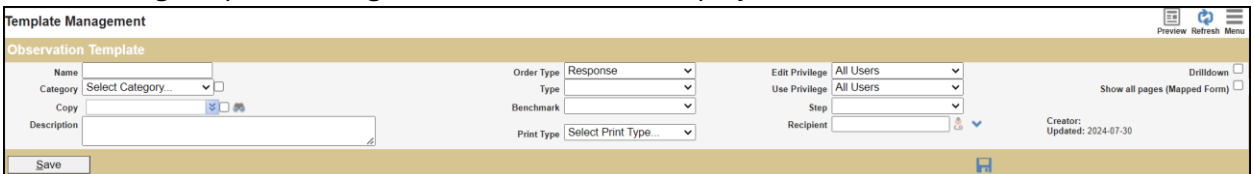


3. The Template Management window will open.

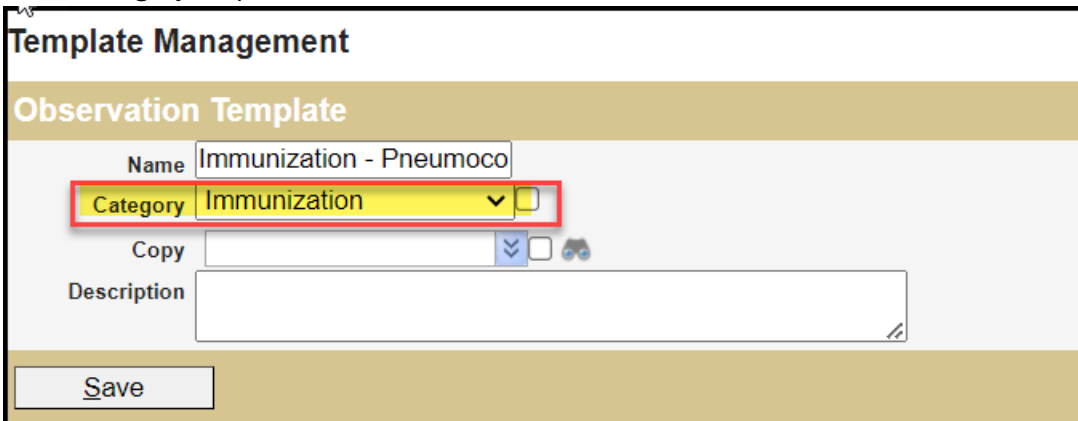
- On the far right (under the word Export), click on **OBS** to create an Observation Template and then click on New to create the new Template



- The following template management window will be displayed.



- In the Name field, enter a name for the new Template i.e., Immunization – Pneumococcal Conjugate 20
- In the category drop down, select Immunization




- The Copy field lets the user copy another template as the basis for the new template. For NS, the template to be copied should be ***Immunization – Panorama (NS)**. **Note:** This template has all the fields required for the Panorama Extract. When the template is selected, all details under the observation name are from the ***Immunization – Panorama (NS)**.

Template Management

Observation Template

Name

Category

Copy *Immunization - Panorara 

Description

→ Observation Name

9. Edit the fields below the Observation name for the immunization favorite you are creating. In this case, the Immunizing Agent selected is Pneu-C-20 and the Manufacture is Pevnar. Note - It should be Pevnar 20 not Pevnar 13. Pevnar 20 is not in the system yet. (If known, any of the other fields can also be set to a default.)

Template Management

Observation Template

| | | |
|--|---|-------------|
| Name: <input type="text" value="Immunization - Pneumoco"/> | Order Type: <input type="text" value="Response"/> | Edit Privil |
| Category: <input type="text" value="Immunization"/> | Type: <input type="text"/> | Use Privil |
| Copy: <input type="text"/> | Benchmark: <input type="text"/> | S |
| Description: <input type="text" value="Immunization - Panorama Template is used in conjunction with NS Immunization extract. Do"/> | Print Type: <input type="text" value="Select Print Type..."/> | Recip |

| Observation Name | Default Value | Comment |
|--|--------------------------|----------------------|
| <input type="text" value="Panorama Immunization Extract"/> | <input type="checkbox"/> | <input type="text"/> |
| <input type="text" value="Patient did not receive va"/> | <input type="checkbox"/> | <input type="text"/> |
| Immunizing Agent | Pneu-C-20 | <input type="text"/> |
| Manufacturer | Prevnar 13 | <input type="text"/> |
| <input type="text" value="Lot #"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry day"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry month"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry year"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Route"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Injection site"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose unit of measure"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose in series"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="of"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Immunization Reason"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Physician Notes"/> | | |

10. Click on Save at the bottom left-hand side of the screen to save the new template.

Template Management

Observation Template

| | | |
|--|---|-------------|
| Name: <input type="text" value="Immunization - Pneumoco"/> | Order Type: <input type="text" value="Response"/> | Edit Privil |
| Category: <input type="text" value="Immunization"/> | Type: <input type="text"/> | Use Privil |
| Copy: <input type="text"/> | Benchmark: <input type="text"/> | S |
| Description: <input type="text" value="Immunization - Panorama Template is used in conjunction with NS Immunization extract. Do"/> | Print Type: <input type="text" value="Select Print Type..."/> | Recip |

| Observation Name | Default Value | Comment |
|--|--------------------------|----------------------|
| <input type="text" value="Panorama Immunization Extract"/> | <input type="checkbox"/> | <input type="text"/> |
| <input type="text" value="Patient did not receive va"/> | <input type="checkbox"/> | <input type="text"/> |
| <input type="text" value="Immunizing Agent"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Manufacturer"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Lot #"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry day"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry month"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Expiry year"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Route"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Injection site"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose unit of measure"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Dose in series"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="of"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Immunization Reason"/> | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Physician Notes"/> | | |

Selecting a template in an encounter

1. Open a patient profile and click on the Visits tab.
2. On the top righthand side of the Visits tab, select New to open a new visit template (Under Appt)
3. In the Plan section of the visit, hover over **Imm** and then select the new template **Immunization – Pneumococcal Conjugate 20**

harry mcphée
 124 years 01-Jan-1900 Female
 Chart#: NSH980 Provider: B. Trzop

Demog Visits Tasks Bills Allg Meds Profile Labs Inves

Visit

Subjective
 Concern

Assessment
 Diagnosis

 Billing Item

Plan Print Care Plan Task Inv Con Lab **Imm**

Enter new note/instructions here

Save

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Betty Trzop
 NS DHW Test Site
 NS

harry mcphée PHN: Chart#: NSH980
 Halifax,NS DOB: 01-Jan-1900 Age: 124 yrs
 Gender: F Provider: Dr. Betty Trzop

Visit Date: 30Jul24

Observations

Task Templates
 User Favourites
 *NS - COVID-19 Immunization >
 Default Immunization - Panorama >
 NS COVID-19 Immunization >
 *COVID-19 Immunization Response >
 CMM Test Immun >
 doing a template for Imm >

Observation Templates
 User Favourites
 *Immunization - Panorama (NS)
 *Immunization - Panorama Request (NS)
 CMM Test Immun
 doing a template for Imm
Immunization - Pneumococcal Conjugate 20

Group Favourites
 *Immunization - Panorama (NS)
 *Immunization - Panorama Request (NS)

Clinic Favourites
 RTsurumi IMM Tdap

- This will open the new template for completion with the Immunizing Agent and manufacturer auto-populated. (Any fields that were defaulted when setting up the favorite immunization will be automatically populated.)

Set up a Favorite Immunization Task

- On the Templates Management, Select **Imm**, and then select New.

This will allow you to set up a new Task Template with a Category of Immunization.

Task

Task Template

Template Name

Category* Immunization Type Type

Description Reason

Note / Instructions

Progress Indicators

Assignee* McPhee, Cathy Start when due Due* Today

Apply as Active Urgency Normal

Apply as Completed Recurrence None

Apply as Cancelled

Observation Details & Usage

Ordering Provider Trzop, Betty

Billing Template

Workflow Step

Observation Template

Edit Privilege All Users

Use Privilege All Users

Usage General

Graph Template Current Observation Set

Print Type Default Task

- The Template Name should be entered as well as the Type. In this case, Pneu-P-23 was added (Pneu-P-20 is currently not in the system).

Task

Task Template

Template Name Pneumococcal 20

Category* Immunization Type Pneu-P-23

Description Recording Pneumococcal 20 Vac Reason

Note / Instructions

Progress Indicators

Assignee* McPhee, Cathy Start when due Due* Today

Apply as Active Urgency Normal

Apply as Completed Recurrence None

Apply as Cancelled

- On the Observation Details & Usage side, for the Observation Template, select the Observation Template **Immunization – Pneumococcal Conjugate 20** (when the is selected, it will automatically be displayed when the task is opened).

Observation Details & Usage

Ordering Provider:

Service Provider:

Billing Template:

Workflow Step:

Observation Template: **Immunization - Pneumococcal Conjugate 20**

Edit Privilege: All Users

Use Privilege: All Users

Usage: General

Graph Template: Current Observation Set

Print Type: Default Task

- Click Save on the bottom of the Task Side of the template to save it.
- Now, when you go into a new visit for a patient, if you hover over task, select Immunization and then Pneumococcal 20, it will display the task and immunization template.

Visit

Subjective: Concern

Assessment: Diagnosis Billing Item

Plan: Enter new note/instructions here

Save

1 / 1 | - +

Betty Trzop
NS DHRM Test Site
NS

harry mcphoe PHN:
Halifax, NS DOB:
Gender:
Provider:

Visit Date: 30Jul24

Observations

Observations

Task Templates

- User Favourites
- *NS - COVID-19 Immunization
- Default Immunization - Panorama
- NS COVID-19 Immunization
- *COVID-19 Immunization Response
- CMM Test Immun
- doing a template for Imm
- Pneumococcal 20**

Observation Templates

- User Favourites
- *Immunization - Panorama (NS)
- *Immunization - Panorama Request (NS)
- CMM Test Immun
- doing a template for Imm
- Immunization - Pneumococcal Conjugate 20
- Group Favourites
- *Immunization - Panorama (NS)
- *Immunization - Panorama Request (NS)
- Clinic Favourites
- RTsurumi IMM Tdap

- This is the display of the template with both the Task Side and Observation showing the defaulted fields.

harry mcphoe NSH980 124 years

Task

Category* Immunization **Type** Pneu-P-23

Description Recording Pneumococcal 20 Vac **Reason**

Note / Instructions
 Enter new note/instructions here

Progress Indicators

Assignee* McPhee, Cathy **Start** 30-Jul-2024 **Due*** 30-Jul-2024

Update or Forward **Urgency** Normal
 Complete this task **Recurrence** None

Observations

Ordering Provider Trzop, Betty **Service Provider**

Date 30-Jul-2024 **Time** 11:30 AM

Panorama Immunization Extract
 Patient did not receive vaccine at this location

***Immunizing Agent** Pneu-C-20
Manufacturer Prevnar 13
Lot #
Expiry day
Expiry month
Expiry year
Route
Injection site
Dose
Dose unit of measure
Dose in series of
Immunization Reason
Physician Notes

[Click Here for Panorama Vaccine List](#)