Forum on Immunizing in Schools

Using the Mass Module in iPHIS

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Vancouver Coastal Health

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Presentation Overview

- Discuss Mass and show what it can do
- Describe the processes for the North Shore
- Discuss success factors
The Mass Module in iPHIS

Can be used to:

- **Document services and information**
  - Immunizations
  - Exemptions
  - Adverse Events and/or Contraindications

- **Prescreen classes**
  - Previous immunizations
  - Exemptions and/or contraindications

- **Review for current immunization status**
  - Next Year: screen Kindergarten classes
In order to do that...

1. Class lists need to be entered into iPHIS
2. Audits need to be created for each clinic
3. Nurses need to know how to use Mass
   • Prescreening
   • Charting
   • Immunization Review
The Pros of using Mass

- Fast entry for nurses
- Easy access to entire school’s records
- Easy to track previous immunization doses
- Client records are up to date and complete
- Continuity of care across the province
- Easy viewing of client records before entry
- Statistics can be pulled from iPHIS
- Information will be converted to Panorama
The Cons of Using Mass

• Significant amount of clerical time needed
• Significant amount of training required
  • Inconsistent terminology
  • Parts of the work flow is not intuitive
• Two nurses cannot currently work on the same clinic at the same time
• No access to:
  • manual dose override
  • make changes or corrections
Upcoming Changes

There was a recent review with input from users across the province and changes will be made to make the system more efficient and user-friendly.

These changes could include:

- Terminology updates
- Some workflow process changes
- Extra training to key users will be available
The Workflow: A broad overview
North Shore Process

The class lists are received

• Via: one school board, private schools, individual schools.

The lists are entered in the Mass Module

• Better the list, better ability to find the client record
• Records are updated if any new information exists.

Immunization Audits are created in Mass

• Entered by clerical in coordination with the person in charge of vaccines
• Allows for seamless set-up
• Done in advance of the clinics.

Immunization entry is done in Mass

• Nurses sign-up for a time to use the Audit
• Nurses enter the services they gave as per best practice standards
Entering Lists in Mass

Prior to the school clinic season:

- Have the class list available
- Open the Mass Module to select Group Lists
Entering Lists in Mass... continued

- Select the school from the Facility drop-down list and Search.
Entering Lists in Mass... continued

- Open the Divisions or the List button
  - The two buttons represent two different ways to enter lists
    - The List button collects a whole school’s students on one large list
    - The Division button allows for separate lists (i.e., Gr6 and a Gr9)

- North Shore uses Divisions for better organization
Entering Lists in Mass... continued

1. Use Select Client to search for and select the student
2. Enter the student’s level and add them to the list (above)
3. Repeat until all students have been added to the list
   • For large lists, separate divisions can be created to speed entry
     i.e. Argyle Gr9 A-M and Argyle Gr9 N-Z

The list is now ready to be connected to an Immunization Audit
Creating Audits in Mass

Prior to prescreening or entry of immunization information from a clinic:

- Have the clinic details ready
  - Clinic date
  - School Name
  - Agents and lot-numbers
  - Providers
Creating Audits in Mass... continued

- Choose the School Name from the dropdown list and View Audits
Creating Audits in Mass... continued

- Name the clinic according to a standard naming function and save before proceeding to the next three tabs.
  - Imms – specify agent groups, i.e. Meningo, Varicella Zoster
  - Ages – Left as All Ages and saved
  - Locations – Choose the group list that was previously created
Creating Audits in Mass... continued

Profiles

Number of Participants: 5
Effective Date: 2008-06-06
Auto-Recalculate Participants: Yes
Calculate Using Schedules: No

New Profile Available
Latest Profile Effective Date: 2008-06-06
Participant Status: Eligible (All)
Show Contraindicated: No
Show Exempted: No

- Enter the Effective Date
- Press Calc. Profile
- The Audit is set up!
- From here, you can:
  - Start screening in advance of the clinic by ticking the Show Contraindicated and Exempted boxes and click View Profile
  - Or go to the Clinic tab to set up school clinic details prior to immunization entry

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Describing the Immunization Audit Process
## Immunization Profiles

- **Effective Date:** 2008-06-06
- **Age:** All Ages
- **Location:** Facilities Blueridge Elementary

### Notes:
- ^ - overdue immunization
- ! - Client has contraindications, exemptions, or adverse events

### Informed Consent

<table>
<thead>
<tr>
<th></th>
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<tr>
<td>BUSBY, TARYN</td>
<td>1995-03-27</td>
<td></td>
<td>Check</td>
<td></td>
<td>HEP B</td>
<td></td>
<td></td>
<td></td>
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<td>1995-03-27</td>
<td></td>
<td>Check</td>
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<td></td>
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<td></td>
<td>Check</td>
<td></td>
<td>VARICELLA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEE, MIKAELA</td>
<td>1995-05-22</td>
<td>(604)566-1234</td>
<td>Check</td>
<td>1995-11-25</td>
<td>HEP B</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEE, MIKAELA</td>
<td>1995-05-22</td>
<td>(604)566-1234</td>
<td>Check</td>
<td>2006-01-18</td>
<td>MENINGO</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Exemptions:

- **Client:** LEE, MIKAELA
- **Birth Date:** 1995-05-22
- **Phone Number:** (604)566-1234
- **Agent Group:** VARICELLA
- **Exemption:** PREVIOUS DISEASE

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**Screening with View Profile**

- Basic information
- Names are hyperlinks
- Latest dose date
- Ability to save consent in advance
- Separates exempted clients
Screening with View Profile... continued

Processing...

Click To Return When Processing Complete

**Pop up view of a client’s record via the View Profile screen**
Clinic set-up in Mass for immunization entry

Clinic Preparation

<table>
<thead>
<tr>
<th>Formulary</th>
<th>Agent</th>
<th>Max Dose</th>
<th>Lot</th>
<th>Site</th>
<th>Dosage</th>
<th>Dosage Units</th>
<th>Route</th>
<th>Reason For Immunization</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHS, HEP B GRADE 6</td>
<td>Hepatitis B</td>
<td>2</td>
<td>F004020</td>
<td>LA</td>
<td>1</td>
<td>ML</td>
<td>INTRAMUSCULAR</td>
<td>ROUTINE VACCINE</td>
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<tr>
<td>PHS, MENV C-C</td>
<td>Meningococcal-Conjugate-C</td>
<td>1</td>
<td>R46132A</td>
<td>LA</td>
<td>.5</td>
<td>ML</td>
<td>INTRAMUSCULAR</td>
<td>ROUTINE VACCINE</td>
</tr>
<tr>
<td>PHS, VARICELLA</td>
<td>Varicella Zoster</td>
<td>1</td>
<td>0615L</td>
<td>LA</td>
<td>.5</td>
<td>ML</td>
<td>SUBCUTANEOUS</td>
<td>ROUTINE VACCINE</td>
</tr>
</tbody>
</table>

• **Clerical staff enter clinic details**

• **Nurse reviews information before pressing Run Clinic**

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Describing the Clinic Set-up Process

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## Immunization Entry in Mass

### Clinic Provision

<table>
<thead>
<tr>
<th>Clinic Date</th>
<th>2008-06-06</th>
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</thead>
<tbody>
<tr>
<td>Clinic Location</td>
<td>Blueridge Elementary Level: Division: 6</td>
</tr>
</tbody>
</table>

#### Immunization Details

<table>
<thead>
<tr>
<th>Agent</th>
<th>Dosage Route</th>
<th>Reason For Immunization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis B</td>
<td>1 ML</td>
<td>INTRAMUSCULAR ROUTINE VACCINE</td>
</tr>
<tr>
<td>Meningococcal-Conjugate-C</td>
<td>.5 ML</td>
<td>INTRAMUSCULAR ROUTINE VACCINE</td>
</tr>
<tr>
<td>Varicella Zoster</td>
<td>.5 ML</td>
<td>SUBCUTANEOUS ROUTINE VACCINE</td>
</tr>
</tbody>
</table>

- Nurses instructed to enter 10-15 then press **Confirm**
- Tick boxes
- Drop-down boxes

### Notes

- ! - Client has contraindications, exemptions, or adverse events.

### Table

<table>
<thead>
<tr>
<th>Id?</th>
<th>Client</th>
<th>Birth Date</th>
<th>Agent</th>
<th>Prev. Imms. Prev. Dose</th>
<th>Lot Number</th>
<th>Site</th>
<th>Provider</th>
<th>Informed Consent</th>
<th>Next Dose</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>BUSBY, TARYN</td>
<td>1995-03-27</td>
<td>Hepatitis B</td>
<td></td>
<td>F004020 (2010-12-31)</td>
<td>LA</td>
<td>JONES,CHRISTINE</td>
<td>YES</td>
<td>1</td>
</tr>
<tr>
<td>✔</td>
<td>BUSBY, TARYN</td>
<td>1995-03-27</td>
<td>Meningococcal-Conjugate-C</td>
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<td>RA6132A (2010-12-31)</td>
<td>LA</td>
<td>JONES,CHRISTINE</td>
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<td>1</td>
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<td></td>
<td>BUSBY, TARYN</td>
<td>1995-03-27</td>
<td>Varicella Zoster</td>
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<td>0615EL (2010-12-31)</td>
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<tr>
<td>!</td>
<td>LEE, MIKELA</td>
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<td>DC (2010-01-01)</td>
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</table>

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Key Areas of Success

Lessons Learned

• Need Manager Support
  • Resources
  • Training
  • Time

• One person to oversee Mass set-up

• Go-to person to help users

• Clean-up the Mass Module at the end of each year so that the process can start with a clean slate in the fall.

• Perform audits on Mass entries to ensure data integrity

• Clear communication
  • Roles, responsibilities and processes are understood by all involved

• Support Documentation (examples to follow)
  • Resources for nurses to reference
Support Documentation

• Communicate how Mass fits into the rest of the school clinic process
  • Mass Clinic Workflow

• Provide standard forms for nurses to use
  • Sign-up sheet (verbal communication for small clinics)
  • Working tool for Mass entry based on class list
  • Immunization forms based on class list for tracking
Support Documentation... continued

Mass Clinic Documentation Process

- Please speak with the CD Coordinator if you have any questions
- Last Updated
  - March 04, 2008

**Immunizing Nurse**

- **Before Clinic: At Site (school)**
  - Fill out the iPHIS Entry sign-up sheet: indicate sign-up time if wanted, entry method, and expected charting completion date after the clinic.
  - Obtain a Clinic immunizations (information working tool) to record client information.

- **During Clinic:**
  - Record the client immunization information on the working tool.
  - Fill out the consent form and give the back page to the client.

- **Post Clinic: At Site (school)**
  - Return the consent to the charge nurse.
  - Take the working tool back to the HU for charting purposes.

- **Post Clinic: Health Unit**
  - Use the Clinic Immunization working tool to chart on client records as you indicated on the iPHIS Entry sign-up sheet.
  - Enter exemptions not already entered in the client records. Note: you only need to enter exemptions noted and that you handled from the clinic. Clerks will enter exemptions written by parents on the consent forms.
  - Return the Clinic Imms working tool to the charge nurse.
  - Call the charge nurse if you have any questions.

**Charge Nurse**

- **Before Clinic: At Site (school)**
  - Ensure nurses fill out the iPHIS Entry sign-up sheet.
  - Ensure each nurse has a Clinic Immunizations (information working tool) to record client immunizations.

- **During Clinic:**
  - Resume the client sign-in and consent form processes as per your normal routine.

- **Post Clinic: At Site (school)**
  - Collect the consent forms.

- **Post Clinic: Health Unit**
  - Document any phone calls or refusals you handled at the clinic in the client electronic health records.
  - Fill out the CD Imms Status Report and send to CD Coordinator within 48 hrs of the clinic.

**Van Co:**

- Promoting wellness. Ensuring care.

Discussing elements of success

- **Mass module Workflow for nurses**
- Shows roles of immunizing and charge nurse at the school clinic regarding the Mass Module
Support Documentation... continued

**iPHIS Entry Sign-up Sheet**

Each nurse must complete this form at the clinic:
- [ ] Indicate how you will enter your clinic charting – Mass Module or on individual client records.
- [ ] If you would like to use the Mass Module, indicate your preferred time.
- [ ] Enter the date you expect to complete your clinic charting.

If you have any questions, speak directly to the clinic Charge Nurse.

Only one person is allowed to use the Mass Module at a time.

**Note:** Do not indicate a time already chosen by another user. Call the charge nurse to schedule a different time if you miss your sign-up window. Alternatively, you are able to chart on individual records at any time.

**School Name:** Blueridge  
**Clinic Date (YYYY-MM-DD):** 6/6/2006

<table>
<thead>
<tr>
<th>Nurse Name</th>
<th>Entry Type</th>
<th>If using the Mass Module: Preferred entry time (1 hr / 20 students)</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mass</td>
<td>Individual Client Records</td>
<td></td>
</tr>
<tr>
<td></td>
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</tr>
</tbody>
</table>

- **Sign-up sheet**
- Prevents multiple nurses from working on the Mass Module at the same time

Discussing elements of success
Support Documentation... continued

Community & Family Health Program
132 West Esplanade, 5th Floor
North Vancouver, BC V7M 1A2

<table>
<thead>
<tr>
<th>SCHOOL NAME</th>
<th>Blueridge</th>
<th>TEACHER:</th>
<th>Ms. Hennessy</th>
</tr>
</thead>
</table>

- **R** = Refusal  - **D** = Disease  - 1 to 6 = Doses 1 to 6  - **C** = Complete
- **V** = Vaccine  - **A** = Absent  - **Y** = Yes to Consent, C/O, reminder sent or non-responder

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**GRADE SIX 2007/2008**

See Ministry Vaccine Definitions sheet for agent guidelines

Hepatitis B – Guideline G
Measles Conjugate – Guideline H
Varicella – Guidelines E and F

| Last Name | First Name | DOB/PHN | Consent | CO | Men C - 1 Dose | Clinic Date: | Hep B - 1 Dose | Clinic Date: | Hep B - 2 Dose | Clinic Date: | Varicella - D / Y | Reminder # 1 | Reminder # 2 | Reminder # 3 | Non Responder |
|-----------|------------|---------|---------|----|---------------|-------------|---------------|-------------|---------------|-------------|---------------|--------------|-------------|-------------|-------------|--------------|
| BUSBY     | Taryn      | 3/27/1995 |         |    |               |             |               |             |               |             |               |              |             |             |             |
| LEE       | Mikaela    | 5/22/1995 |         |    |               |             |               |             |               |             |               |              |             |             |             |

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- **School Immunization Form**

- **Nurses use this to track the student immunization status throughout the school year**

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Discussing elements of success
Clinic Immunizations: Information Working Tool

All fields must be filled at the clinic.
Information on this form is used to complete client charting on the electronic record at the HU.
Keep this form in a safe place and shred after it has been entered on the electronic record.
If you have any questions, speak directly to the clinic Charge Nurse.

Immunizing Nurse: Nurse Jones
School Name: Blueridge
Clinic Date (yyyy-mm-dd): 6/6/2008

Agent: Hepatitis B
Lot Number: F004020

<table>
<thead>
<tr>
<th>Last Name, First Name</th>
<th>DOB</th>
<th>Hep-B</th>
<th>LA</th>
<th>RA</th>
<th>Men-C</th>
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<th>RA</th>
<th>Vz</th>
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</tbody>
</table>

Comments: (ie: new exemption or notable information)
Summary

• Mass can be used to:
  • Document services and information
  • Prescreen student immunizations before school clinic
  • Review for current immunization status

• North Shore processes

• Key Success factors
  • Manager Support
  • Resources and training
  • Designated super-users for set-up and to provide help
Thank You