

# Charting: Defer a Vaccine

Last Modified on 08/08/2022 11:26 am EDT

Version 20.17

## About

Vaccine Deferrals can be documented either individually or for multiple vaccines.

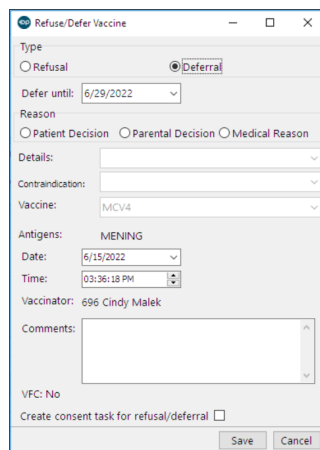
## Individual Vaccine Deferral

Follow the below steps to document an individual vaccine deferral when charting:

1. Access the patient's chart from the Clinical, Practice Management, or Billing tab.
2. Create or open a Well Visit and click **Plan/Orders** or an Encounter Note and click **Orders**.
3. Click the **Imm** tab.
4. Select the radio button in the **Def** column for the vaccine that will be deferred.
5. Click the **Create** button. The Refuse/Defer Vaccine window is displayed with Deferral selected by default.



**Note:** You may also click the **Do Now** button and the **Refuse/Defer Vaccine** window will display.



The screenshot shows the 'Refuse/Defer Vaccine' dialog box. It has a title bar with a close button. The 'Type' section has two radio buttons: 'Refusal' (unselected) and 'Deferral' (selected). Below this is a 'Defer until:' dropdown menu showing '6/29/2022'. The 'Reason' section has three radio buttons: 'Patient Decision' (unselected), 'Parental Decision' (unselected), and 'Medical Reason' (unselected). There are three dropdown menus for 'Details:', 'Contraindication:', and 'Vaccine:' (showing 'MCV4'). The 'Antigens:' field shows 'MENING'. The 'Date:' dropdown shows '6/15/2022' and the 'Time:' dropdown shows '03:36:18 PM'. The 'Vaccinator:' field shows '696 Cindy Malek'. There is a 'Comments:' text area. At the bottom, there is a checkbox for 'VFC: No' and another for 'Create consent task for refusal/deferral' (unchecked). 'Save' and 'Cancel' buttons are at the bottom right.

6. Complete the following fields:

- **Defer until:** The default date will be 2 weeks from the date created. To change the date, click the Defer until drop-down and select from the calendar.



**Tip:** If you do not want to create tasks for the vaccine administration and follow-up appointment, clear the **Defer until date**. This is used when the Practice wishes to continue forecasting the vaccine. This allows the Practice to continue inquiry for the administration of the vaccine.

- **Reason:** Select a radio button to indicate the reason for deferral.
- **Details:** Click the drop-down arrow and select from the list.
- **Contraindication:** This field is available when the Reason selected is Medical Reason and the Details selection is not Immunity or Out of Stock. Click the drop-down arrow and select from the list.
- **Vaccine:** Populates with the selected vaccine chosen in the Plan/Orders window.
- **Date:** (*Optional*) Defaults to the current date. Click the drop-down or type a date if the deferral should reflect a different date.

- **Time:** *(Optional)* Defaults to the current time. Click the up/down arrow to select a different time if the deferral should reflect a different time.
- **Comments:** Type additional comments, if necessary.
- **Create consent task for refusal/deferral:** Select the checkbox to create a task for a deferral consent form, if this is your Practice's policy.

7. Click **Save**.
8. Click **OK** in the confirmation window to create the immunization task.

## Multiple Vaccine Deferrals

Follow the steps below to document multiple vaccine deferrals when charting:

1. Access the patient's chart from the Clinical, Practice Management, or Billing tab.
2. Create or open a Well Visit and click **Plan/Orders** or an Encounter Note and click **Orders**.
3. Click the **Imm** tab.
4. Select the radio button in the **Def** column for each vaccine to defer.
5. Click the **Create** button. The **Refuse/Defer Vaccine** window displays the first deferred vaccine.



**Note:** You may also click the **Do Now** button and the **Refuse/Defer Vaccine** window will display.

6. Complete the below fields.

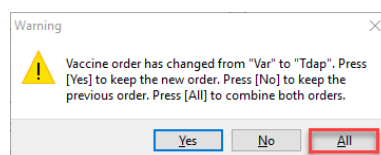
- **Defer until:** The default date will be 2 weeks from the date created. To change, click the drop-down and select from the calendar.



**Tip:** If you do not want to create tasks for the vaccine administration and follow-up appointment, clear the **Defer until date**. This is used when the Practice wishes to continue forecasting the vaccine even if the parent has refused. This allows the Practice to continue inquiry for the administration of the vaccine.

- **Reason:** Select a radio button to indicate the reason for deferral.
- **Details:** Click the drop-down arrow and select from the list.
- **Contraindication:** This field is available when the Reason selected is Medical Reason and the Details selection is not Immunity or Out of Stock. Click the drop-down arrow and select from the list.
- **Vaccine:** Populates with the first selected vaccine chosen in the Plan/Orders window.
- **Date:** *(Optional)* Defaults to the current date. Click the drop-down or type a date if the deferral should reflect a different date.
- **Time:** *(Optional)* Defaults to the current time. Click the up/down arrow to select a different time if the deferral should reflect a different time.
- **Comments:** Type additional comments, if necessary.
- **Create consent task for refusal/deferral:** Select the checkbox to create a task for a deferral consent form, if this is your Practice's policy.

7. Click **Save**. The Refuse/Defer Vaccine window displays the next deferred vaccine.
8. Complete the fields as described above and repeat until all deferred vaccines have been saved.
9. Click the **All** button in the Warning prompt.



10. Click **OK** in the confirmation window to create the immunization task.

**Tip:** Three tasks will be created for the deferral:

- A task to schedule a follow-up visit for the vaccine using the Defer until date.
- A task to administer the deferred vaccine on the deferral date.
- *(Optional)* A task to complete the consent for deferral if the Create consent task for refusal/deferral checkbox was selected.



Department Name : Nurse		
08/25/2021	Not Started	REED FOWLER
In House Diag Tests: HEARING SCREEN PURE TONE AIR ONLY; VISION SCREEN		
08/25/2021	Not Started	REED FOWLER
Imms: MCV4		
08/25/2021	Not Started	REED FOWLER
Consent for Deferred Imms: HPV9		
08/25/2021	Not Started	REED FOWLER
Schedule Follow-up Imms on 9/8/2021: HPV9		
09/08/2021	Not Started	REED FOWLER
Imms Deferred: HPV9		

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## Individual Vaccine Deferral

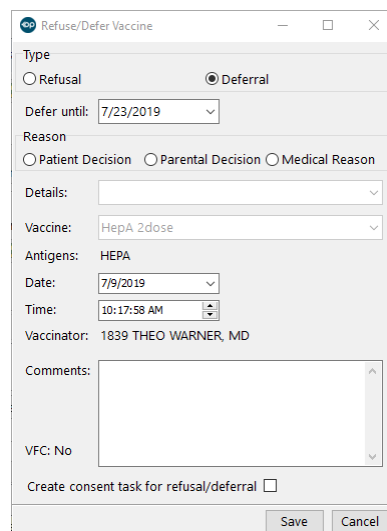
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1. Access the patient's chart from the Clinical, Practice Management, or Billing tab.
2. Create or open a Well Visit and select **Plan/Orders** or an Encounter note and select **Orders**
3. Click the **Imm** tab.
4. Select the radio button in the **Def** column for the vaccine to defer.
5. Click the **Create** button.



**Note:** You may also click the **Do Now** button and the **Refuse/Defer Vaccine** window will display.

6. The Refuse/Defer Vaccine window displays.



7. Complete the below fields.

- **Defer until:** The default date will be 2 weeks from the date created. To change, click into the field and enter the date to defer until or click the drop-down arrow and select from the calendar.



**Tip:** It is recommended if you do not wish to create tasks for the vaccine administration and follow-up appointment, clear the **Defer until date**. This is used when the Practice wishes to continue forecasting the vaccine. This allows the Practice to continue inquiry for the administration of the vaccine.

- **Reason:** Select a radio button to indicate the reason for deferral.
  - **Details:** Click the drop-down arrow and select from the list.
  - **Vaccine:** Will populate with the selected vaccine chosen in the Plan/Orders window.
  - **Date:** (*Optional*) Defaults to the current date. Click the drop-down or type a date if the deferral should reflect a different date.
  - **Time:** (*Optional*) Defaults to the current time. Click the up/down arrow to select a different time if the deferral should reflect a different time.
  - **Comments:** Type additional comments, if necessary.
  - **Create consent task for refusal/deferral:** Click the checkbox to create a task for a deferral consent form, if this is your practice policy.
8. Click **Save**.
  9. A confirmation window displays to create the immunization tasks, click **OK**.

## Multiple Vaccine Deferrals

Follow these steps to document multiple vaccine deferrals when charting:

1. Access the patient's chart from the Clinical, Practice Management, or Billing tab.
2. Create or open a Well Visit and select **Plan/Orders** or an Encounter note and select **Orders**.
3. Click the **Imm** tab.
4. Select the radio button in the **Def** column for each vaccine to defer.
5. Click the **Create** button.



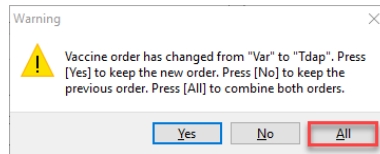
**Note:** You may also click the **Do Now** button and the **Refuse/Defer Vaccine** window will display.

6. The **Refuse/Defer Vaccine** window displays the first deferred vaccine.
7. Complete the below fields.
  - **Defer until:** The default date will be 2 weeks from the date created. To change, click into the field and enter the date to defer until or click the drop-down arrow and select from the calendar.



**Tip:** It is recommended if you do not wish to create tasks for the vaccine administration and follow-up appointment, clear the **Defer until date**. This is used when the practice wishes to continue forecasting the vaccine even if the parent has refused. This allows the practice to continue inquiry for the administration of the vaccine.

- **Reason:** Select a radio button to indicate the reason for deferral.
  - **Details:** Click the drop-down arrow and select from the list.
  - **Vaccine:** Will populate with the first selected vaccine chosen in the Plan/Orders window.
  - **Date:** (*Optional*) Defaults to the current date. Click the drop-down or type a date if the deferral should reflect a different date.
  - **Time:** (*Optional*) Defaults to the current time. Click the up/down arrow to select a different time if the deferral should reflect a different time.
  - **Comments:** Type additional comments, if necessary.
  - **Create consent task for refusal/deferral:** Click the checkbox to create a task for a deferral consent form, if this is your practice policy.
8. Click **Save**.
  9. The **Refuse/Defer Vaccine** window displays for the next deferred vaccine.
  10. Complete the fields as described above and repeat until all deferred vaccines have been saved.
  11. Warning prompt displays, click the **All** button.



12. A confirmation window displays to create the immunization tasks, click **OK**.

**Tip:** Three tasks will be created for the deferral:

- A task to schedule a follow-up visit for the vaccine using the Defer until date.
- *(Optional)* A task to complete the consent for deferral. The task will be created if the Create consent task for refusal/deferral checkbox was selected.
- A task to administer the deferred vaccine on the deferral date.



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