

Immunizations: Complete List - Defer

Last Modified on 08/09/2022 2:57 pm EDT

Version 20.17

About

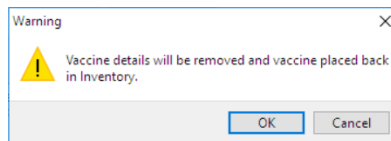
When a vaccine has been deferred, it will display in the Complete List tab in the patient's Immunization record in their chart. The vaccine status will display as Deferred and will include the selection made as to the reason for the deferral in the Refuse/Defer window.



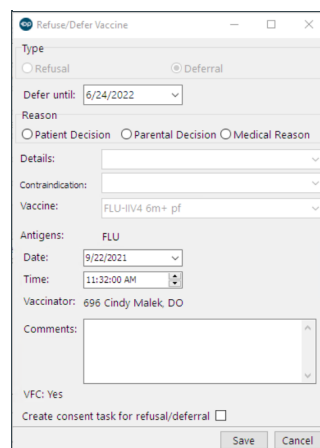
Warning: Selecting to defer a vaccine will continue the vaccine's forecast.

If the vaccine was not deferred during the charting process, it may be corrected from the Complete List tab in the Immunizations window. Below are instructions on how to correct the patient record.

1. Navigate to a patient's Immunization record in their chart: **Clinical, Practice Management, Billing tab > Patient Chart > search for and select the patient > Immunizations.**
2. Click the **Complete List** tab.
3. Click the **Edit** button. The Edit Vaccine window is displayed.
4. Click the **Status** drop-down and select **Deferred**.
5. Click **OK** in the Warning message.



6. Complete the details of the deferral in the Refuse/Defer Vaccine window.



The "Refuse/Defer Vaccine" window is shown. It has a "Type" section with radio buttons for "Refusal" and "Deferral" (selected). Below is a "Defer until" date field set to "6/24/2022". The "Reason" section has radio buttons for "Patient Decision", "Parental Decision", and "Medical Reason". There are three drop-down menus for "Details:", "Contraindication:", and "Vaccine:". The "Vaccine:" field is set to "FLU-HIV4 6m+ pf". Below that, "Antigens:" is set to "FLU", "Date:" is "9/22/2021", "Time:" is "11:32:00 AM", and "Vaccinator:" is "696 Cindy Malek, DO". There is a "Comments:" text area. At the bottom, there are checkboxes for "VFC: Yes" and "Create consent task for refusal/deferral", and "Save" and "Cancel" buttons.

- **Defer until:** The date will default 2 weeks from the current date. If you wish to change the date, click into the field and enter a date or click the drop-down arrow and select from the calendar.
- **Reason:** Select a radio button to indicate the reason for refusal.
- **Details:** Click the drop-down arrow and select from the list.
- **Contraindication:** This field will be available when Medical Reason was selected. A Contraindication must be entered to save the record.
- **Vaccine:** Click the drop-down arrow and select the vaccine that is deferred.
- **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.

7. Click **Save**.

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. The task will be created if the Create consent task for refusal/deferral checkbox was selected.



Department Name : Nurse		
Due Date	Status	Ordered By
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		
9/8/2021	Not Started	REED FOWLER
Imms Deferred: HPV9		

Edit Vaccine Defer Date

1. Navigate to a patient's Immunization record in their chart: **Clinical, Practice Management, Billing tab > Patient Chart > search for and select the patient > Immunizations.**
2. Click the **Complete List** tab.
3. Click to select the vaccine that was deferred, and click the **Edit** button.
4. In the **Defer until** field, enter the new defer date.
5. Click the **Save** button.
6. Edit the task for administering the vaccine to the new defer date.
 - a. Click **Tasks** from the Patient Chart.
 - b. With the task highlighted, click the Date Date drop-down and select from the calendar.

Tasks																																																				
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<div style="border: 1px solid gray; padding: 5px;"> <p>Wednesday, August 25, 2021</p> <p>September 2021</p> <table border="1"> <thead> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> <td>2</td> </tr> <tr> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> </tbody> </table> <p>Clear</p> <p>ages 4-11</p> </div>				Sun	Mon	Tue	Wed	Thu	Fri	Sat	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9
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Version 20.16

About

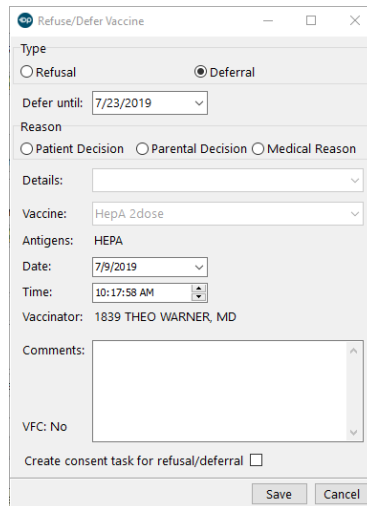
When a vaccine has been deferred, it will display in the patient's chart on the Complete tab of Immunizations. The vaccine status will display as deferred and include the selection made on the Refuse/Defer form for the details or reason for the deferral.



Warning: Selecting to defer a vaccine will continue the vaccine's forecast.

If the vaccine was not deferred during the charting process it may be corrected from the Complete List tab in the Immunizations window. Below are instructions on how to correct the patient record and vaccine inventory, if necessary.

1. From the patient chart, click **Immunizations**.
2. Select the **Complete List** tab.
3. Click the **Refuse/Defer** button
4. The Refuse/Defer Vaccine window displays.



5. Complete the below fields.

- **Type:** Select the Deferral radio button.
- **Defer until:** The date will default 2 weeks from the current date. If you wish to change the date, click into the field and enter a date or click the drop-down arrow and select from the calendar.
- **Reason:** Select a radio button to indicate the reason for refusal.
- **Details:** Click the drop-down arrow and select from the list.
- **Vaccine:** Click the drop-down arrow and select the vaccine that is deferred.
- **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.

6. Click **Save**.

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 will be created 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.



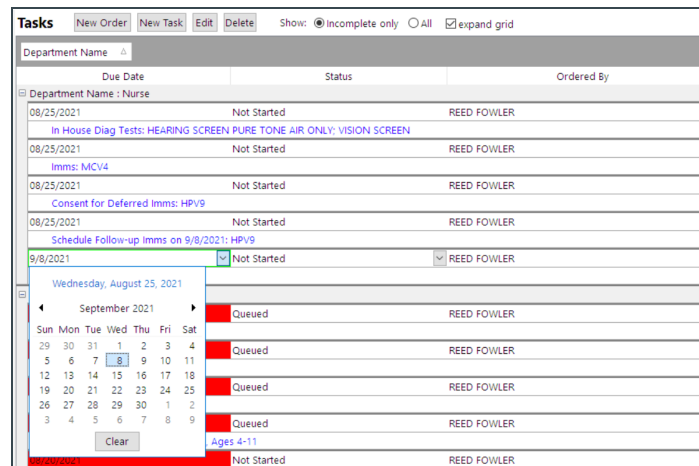
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Correct Vaccine Inventory

1. Navigate to your vaccine inventory: **Practice Management tab > Manage vaccine inventory**.
2. Locate the vaccine lot number that contains a wasted dose.
3. Click the **Ellipses** button to edit the lot.
4. The Vaccine Inventory Item Detail window appears. Change the number in the **Doses Used** field to account for the wasted amount that occurred.
5. Enter pertinent information in the **Notes** field to document the wasted doses per your office protocol.
6. Click the **Save** button.

Edit Vaccine Defer Date

1. From the patient chart, click **Immunizations**.
2. Select the **Complete List** tab.
3. Highlight the vaccine that was deferred, click the **Edit** button.
4. In the Defer until field, click the drop-down or enter the new defer date.
5. Click the **Save** button.
6. Edit the task for administering the vaccine to the new defer date.
 - a. Click **Tasks** from the Patient Chart.
 - b. Highlight the task, click the drop-down arrow in due date and select from the calendar.



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