



April 2021 Clarity Updates

Immunization Changes

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As always, the Visonex Support Services team is available to answer any questions and concerns you have by calling the Clarity Help Line at 877-285-7944.

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Intended for client communication.



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## Immunization Changes – What is new?

### Standardized Vaccine Catalog

- Clarity now offers the standardized Center for Disease Control (CDC) vaccine catalog.
- **BENEFITS:**
  - No more internal list to maintain!
  - Easier immunization tracking and quality reporting.
  - Ability to interface with State Immunization Information Systems.
  - Supports CEHRT (Certified Electronic Health Record Technology).

### Local Vaccine Formulary (see [QRG: Vaccine Formulary](#) for set up information)

- An optional Vaccine Formulary will be available to allow clients to filter the vaccine choices that are available.
- **BENEFITS:**
  - Dialysis facilities and pharmacies can limit the vaccine options to what they stock.
  - Billers can be more confident that the correct option is chosen.

### Documentation at Time of Treatment

- Users now have the ability to document several pieces of immunization information in the treatment entry screen at the time of the treatment. Real Time Charting (RTC) and Visit Management (VM) have been enhanced to include:
  - Injection site
  - Lot Number
  - Manufacturer
  - Vaccine Information Sheet (VIS) and a link to obtain information.

## Data Migration – What does this mean for my organization?

Existing immunization records were divided into two groups and were handled accordingly.

### Standardization

The first group of items were records that were true immunizations. These records were *updated* to match the naming convention of the CDC catalog that is now being used. At a minimum we were able to map the Vaccine Group. If additional information was available, the Vaccine Name was mapped, and sometimes the Product Name.

### What does it look like now?

Vaccines are organized by **Vaccine Group, Vaccine Name, and Product Name**, and are sorted by immunization date. They are also now “searchable” in the immunization grid.



Patient Allergies: Cozaar - [Allergies added](#)

By Vaccine Group, Name, Status.... [More Info](#)

Search Immunization...

Vaccine Group	Immunization	Status	Immunization Date	Last Updated	Updated By
<a href="#">COVID-19</a>	COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 mL dose	Administered in Clinic	03/10/2021	03/10/2021 15:18	N
<a href="#">COVID-19</a>	COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 mL dose	Scheduled in Clinic	04/07/2021	03/10/2021 11:09	N
<a href="#">FLU</a>	Influenza, injectable, MDCK, quadrivalent, preservative	Administered in Clinic	09/25/2020	09/25/2020 13:56	R
<a href="#">FLU</a>	Influenza, injectable, MDCK, quadrivalent, preservative	Administered in Clinic	10/16/2019	10/16/2019 10:49	V
<a href="#">FLU</a>	Influenza, seasonal, injectable	Administered Elsewhere	10/08/2018	10/08/2018 09:50	V
<a href="#">FLU</a>	Influenza, seasonal, injectable	Administered Elsewhere	10/13/2017	08/30/2018 20:19	S
<a href="#">PneumoPPV</a>	pneumococcal polysaccharide PPV23	Administered Elsewhere	10/13/2017	08/30/2018 20:18	S

[Add New](#)

**More Info**  
hyperlinks: QRGs; VIS, Contraindications

**What is a Vaccine Group?** A vaccine group refers to the family of vaccines that can be used to vaccinate against a certain disease, such as *FLU*.

**What is a Vaccine Name?** A vaccine name is the individual vaccine, such as *seasonal trivalent influenza vaccine, adjuvanted, preservative free*.

**What is a Product Name?** Product names reflect manufacturer trade names, such as *Engerix – B – Adult*.

## Migration

The second group consisted of items that are not truly immunizations based on CDC vaccination standards. These items were migrated to other modules in Clarity, including Tests & Procedures, Lab Results, Patient Notes, and Medications. To align clients more closely, standardized names were used, however all data was carefully preserved in the migration.

Examples of data that was entered into Immunization area and has been moved other areas include:

- TB Skin Test – These items have moved to Tests & Procedures. Updates coming soon will enhance this area to better record and capture data for testing. Examples of TB data elements that were migrated include:
  - TB Test
  - PPD
  - TB Blood Test (T-Spot)
  - TB Blood Test (QuantiFERON – TB Gold)
  - TB – AFB Test (Sputum)

**TIP:** To assure that you are flagging the TB Skin test to be read, consider adding “Test & Procedure” information to Real Time Charting to alert staff of the need to read skin test.

- Guaiac test – Tests & Procedures
- Chest X-ray – Tests & Procedures
- Hepatitis Titers and antibodies – Lab Results
- Immunization Administration Fee – Patient Notes
- HBIG – Medications

**TIP:** Antibody therapies are available in Medications

For questions about your facility data, reach out to the Support Team.



## Updated Immunization Workflows – How do we use the new features?

There are 3 workflows that are supported with the Immunization screen. Each of these can be accessed in the Immunization screen. When selecting “Add New” the following options for workflow will display:

- **Order/Schedule Immunization**
  - Enter an order for immunization to be given during treatment. This is the PREFERRED workflow.
- **Record an immunization Administered Elsewhere.**
  - Patients often receive immunizations at SNF, drug store, or primary care office. This area is designed to allow those immunizations to be added to the patient’s record.
- **Add an Immunization to a Recent, Unbilled Treatment**
  - **Requires** special user permission (below).
  - Allows “Enter Treatment” workflow to remain in place.
  - Created as a “oh no” we did not document in Real Time option

User May Add Older Medication Orders	<input checked="" type="checkbox"/>	User May Take Or
User May Add Older Lab Orders	<input checked="" type="checkbox"/>	User Hidden in Dr
User May Add Immunization to Recent, Unbilled Treatment	<input checked="" type="checkbox"/>	

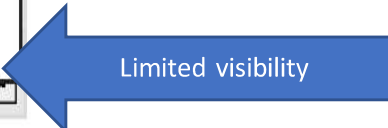


Box must be checked

In the following pages we will review each of these options separately.

### Add/Edit Immunization

Immunization Event Type	<div>Select value</div> <div>Order/Schedule Immunization</div> <div>Record an Immunization Administered Elsewhere</div> <div>Add an Immunization to a Recent, Unbilled Treatment</div>
Status	



Limited visibility



## Order/Schedule an Immunization – Document in RTC/VM

This workflow is designed to allow an immunization to be ordered and administered during a scheduled visit.

Items in RED below are required when ordering/scheduling an immunization:

**Add/Edit Immunization**

**Immunization**

**Vaccine Group** Select value

**Vaccine**  **Product**  **Manufacturer**

**Route** Select value  **Volume (ml)**  **Series Dose #**

**Comments** 0/100

**ICD-10** Select value ☐ Add to Patient's Current Problem List

**Category** Select value

**Order Method** Select value

**Order Taken Date**

**Order Taken By** Grey@, 2661 Meredith RN (Clinician who must sign order)

**Ordered By** Select value (Physician who must sign order)

\* Favorite  
\*\* Co-Morbidities  
@ Problem List and Favorite

- **What is a Vaccine Group?** A vaccine group refers to the family of vaccines that can be used to vaccinate against a certain disease. Optional data elements to be entered would be to the Vaccine name – clicking the **Select Vaccine**. This will auto populate the Vaccine Name, Product and Manufacturer. The Vaccine name (select vaccine) can be updated within RTC if the vaccine available has changed.
- **ICD- 10** – Clinic favorites will be at the top of the list.
- **Order information** – Items required for electronic signatures.

### Other items:

- Vaccine name – This will be required at the time of administration.
- Route – This will be required at the time of administration.
- Volume – This will be required at the time of administration.
- Series Dose # - This is an optional field. This can be updated on previous immunizations administered, too. It will be displayed in RTC or VM for staff to see.
- Comments - These will also be displayed in RTC and VM for staff to see.

## Documenting Immunization Given in RTC or VM

When staff members document medications administered for the day in which an immunization is scheduled, it will appear in RTC or VM under the “Medication” tab.

There are 4 options from which to select for each immunization. Selecting these options will allow the immunization screen to be updated after the treatment is added or posted at the end of the day.



The 4 options are:

- Given
  - When selecting this option, the screen will expand for data elements to be entered. Required elements will be indicated (in red) when signing off immunization and will be required data elements prior to posting. The only items not required are series and dose number.
  - TIP:** Vaccine can be updated in this area if needed. The Vaccine selected will specify the VIS that is printed.

Select Vaccine		Additional Required Fields			
Vaccine	Hep B, adult	Product	ENERIX-B-ADULT	Manufacturer	GlaxoSmithKline
Route	Intramuscular	Volume(ml)	2.00	Series Dose #	2nd of 3rd series
Lot Number		Expiration Date			
Injection Site	Select Value	Given By	Select Value		
Vaccine Information Statement (VIS)	Select Value	Edition Date	Select Value	Date Provided	3/17/2021

- Postpone
  - This will automatically move the treatment to the next scheduled treatment date. Once the Treatment is posted, the date on the Immunization Form advances and the Status remains as “Scheduled in Clinic” and the Immunization Date advances to the **next scheduled treatment**.
  - TIP:** When entering a missed treatment through **Enter Treatment screen does not allow reschedule immunizations**. Staff will need to go to the immunization screen to reschedule immunizations if patients do not come to their next scheduled appointment. **Moving a scheduled treatment in Patient> Patient Schedule will allow rescheduling of immunization.**
  - TIP:** New Report! – “Clinic Immunizations Pasted Due” This will assist in rescheduling, canceling or documenting refusal of immunizations. This will capture any old immunizations that may need addressing. You will be able to cancel, reschedule the date or mark these refused.
  - TIP:** A patient may prefer to wait until next treatment. The postponed, cancelled and refused immunizations along with notes will display on Report > Treatment Variations.
- Refused
  - This will allow users to indicate a reason for refusal. It will update the immunization screen accordingly. These reasons are not configurable and are based on EQRS information.

Given / Postpone / Refused / Cancel	Refused Reason
<input type="radio"/> Given <input type="radio"/> Postpone <input checked="" type="radio"/> Refused <input type="radio"/> Cancel Order	Select Value Allergic

- Cancel order
  - This will CANCEL THE ORDER. The user will need to obtain a NEW ORDER if the immunization needs to be administered later.





## Record an Immunization Administered Elsewhere

This option allows information to be entered as an update to the patient's record. Immunizations can be entered with or without supporting documentation. This does NOT require a physician order since you are recording an event.

When this option is selected, the facility will be required to enter items noted by red boxes below:

The screenshot shows a web-based form for recording an immunization. The form is divided into several sections. The top section contains fields for 'Vaccine Group' (highlighted with a red box), 'Vaccine', 'Route', 'Comments', 'Product', 'Volume (ml)', 'Manufacturer', and 'Series Dose #'. The 'Vaccine Group' field is set to 'COVID-19'. The 'Vaccine' field is set to 'COVID-19, mRNA, LNP-S, P'. The 'Product' field is set to 'Moderna COVID-19 Vaccine'. The 'Manufacturer' field is set to 'Moderna US, Inc.'. The 'Route' field is set to 'Select value'. The 'Volume (ml)' field is empty. The 'Series Dose #' field is empty. The 'Comments' field contains the text 'given in nursing home'. A blue arrow points to the 'Comments' field with the text 'Insert comments here.'.

The bottom section is titled 'Administration' and contains fields for 'Immunization Date' (highlighted with a red box), 'Status', and an 'Add' button. The 'Immunization Date' field is set to '02/01/2021'. The 'Status' field is set to 'Adm Elsewhere w/ Docu'. A blue arrow points to the 'Status' field with the text 'Note with or without documentation.'

The facility may also choose to upload any documentation into Clarity's Document Management area. This is located in [Patient > Patient Chart View](#). Folders for storing information can be customized to fit your facility's needs. Please contact Support Services for more information.

## Add an Immunization to a Recent, Unbilled Treatment

This option was created to ensure a workflow is in place for:

- Missed documentation.
- Potential "down time" due to loss of internet
- Facilities who do not use Real-Time Charting solutions

This option ONLY appears when users have specific roles in [Maintenance > User Preference](#). In most facilities, this access should not be granted to all users.





User May Add Older Medication Orders	<input checked="" type="checkbox"/>	User May Take Or
User May Add Older Lab Orders	<input checked="" type="checkbox"/>	User Hidden in Dr
User May Add Immunization to Recent, Unbilled Treatment	<input checked="" type="checkbox"/>	

Box must be checked

When selecting this option, the workflow is like that of Enter/Schedule Immunization. Items noted in red below will be required. Users will be required to associate the immunization to a treatment that has been documented using RTC, VM, or Enter Treatment screen. Once this date is chosen it will automatically populate the Immunization Date field.

Immunization			
Vaccine Group	Select value	Select Vaccine	
Vaccine		Product	Manufacturer
Associated Treatment	Select value	Only Unbilled Treatments display. Dates can go back 60 days. The selected date will also populate the Immunization Date and the VIS Date Provided.	
Route	Select value	Volume (ml)	Series Dose #
Comments	0/100		
ICD-10	Select value	<input type="checkbox"/> Add to Patient's Current Problem List * Favorite ** Co-Morbidities @ Problem List and Favorite	
Order Method	Select value		
Order Taker Date			
Order Taken By	Cable, Wendy L Visonex Analysis	(Clinician who must sign order)	
Ordered By	Select value	(Physician who must sign order)	
Administration			
Immunization Date		Status	Administered In Clinic
Documentation Section			
Lot Number		Expiration Date	
Injection Site	Select value	Given By	Select value
Vaccine Information Statement (VIS)	Select value	Edition Date	Select value
		Date Provided	
			Add



## Charge Items – clients with billing interface

For clients who have an existing charge interface, updates will be required.

- Current charges will need to be ended.
- New charges will need to be created.
  - NDC codes can be added to the Charge Item.
  - Future updates: NDC will be attached at the Immunization Administration level

**Edit Charge Item**

Item Type	Immunization ▼
Facility	<input checked="" type="checkbox"/> All Facilities
Charge Item	Influenza ▼
Description	Influenza Virus preservative free
Comments	
Administration Type	<input type="checkbox"/> Adm on Dialysis <input type="checkbox"/> Self Adm on Dialysis <input type="checkbox"/> Facility Adm <input type="checkbox"/> Bulk Supply <input type="checkbox"/> All Types
Charge Code Abbr	FLU1
	00000
(Not Used)	
(Not Used)	

Label as NDC Code

## Considerations to be reviewed:

- Watch for new reports included in this update:
  - **Updated!** Clinic Immunizations – canceled immunizations will not appear.
  - **New!** Clinic Immunizations Past Due – reviews any outstanding immunization previously scheduled and not given.
  - **Coming soon!** The ability to create custom reports by Vaccine group and include lab results. For example, Hepatitis series and Titers in one report!
- Updates to assessment items:
  - Immunizations when appearing will display administered, refused, and postponed.
    - There is a link available for Immunization Form
    - There is a checklist library item that shows limited Immunizations (last one per group, all for HepB and COVID)
  - Test and Procedure may need to be added to existing RTC or Assessments.
    - Hyperlinks can be added to RTC or VM to allow staff to access Test and Procedure Screen directly to update items, such as TB skin test results.
    - There is a checklist library item that can show Tests for 'x' number of months. Open items will have the completed date in bold.
    - **Coming soon!** Updates to Test and Procedure for a more intuitive workflow when documenting Skin Test Results

