National Immunisation Register (NIR) 2011

National Administration Manual

ORION HEALTH

Legal Notice

Contents

National Administration Manual

The National Immunisation Register (NIR) provides an accurate record of the immunisation history for all participating individuals in New Zealand. It is a Ministry of Health initiative based on an application developed by Orion Health Ltd.

For background details on NIR and how it functions, refer to the NIR Provider Browser Manual.

National Administrator's Role

NIR provides the following functionality to National and District Health Board (DHB) administrators:

- Correcting errors present in incoming messages from provider PMS systems. This is a critical task for all administrators because it ensures that an individual's immunisation records are up-to-date
- Search for an individual's record within NIR, with the ability to edit or update contact or other demographic details as required
- Display and update the list of programmes an individual is registered with. View and amend the list of providers associated with the individual in each programme group
- View an individual's Current and Full Task Lists. Normally tasks are completed and updated by the individual's nominated provider via messaging or browser. However, this functionality is also available to administrators
- View a summary of all results collected for an individual as his or her tasks were completed by their provider. View any letters or other documents that were created at the same time
- Merge the immunisation records of individuals who have been found to have two or more identifiers

My Details

The **Common** menu is available to all NIR users and includes the **My Details** icon . Clicking this icon opens a screen displaying the current user's ID along with other NIR-related details.

My Details Panel

The **My Details** panel includes the following options and details:

1. **Change my password...** - allows the user to change his or her password
2. **Home Page** - allows the user to select the page they wish to see first following login
3. **Inactivity Timeout** - allows the user to specify a time period within which, if they do not use their computer, they will be logged out of NIR
4. **Important Message Notification** - not used in this version of the NIR application

The **Groups** to which the user belongs are listed on the right of this panel. A user's group memberships determines which NIR features he or she will have access to.

My Attributes Panel

The **My Attributes** panel includes a **Users** section with the following information:

- **E-mail** - the user's e-mail address
- **Full Name** - the user's full name
- **DHB Description** - the name of the DHB with which the user is associated

Version Summary

The **Common** menu also includes the **Version Summary** icon . Clicking this icon displays the current NIR version and service pack numbers; information which may be of use if you are reporting a problem to the MOH Help Desk.
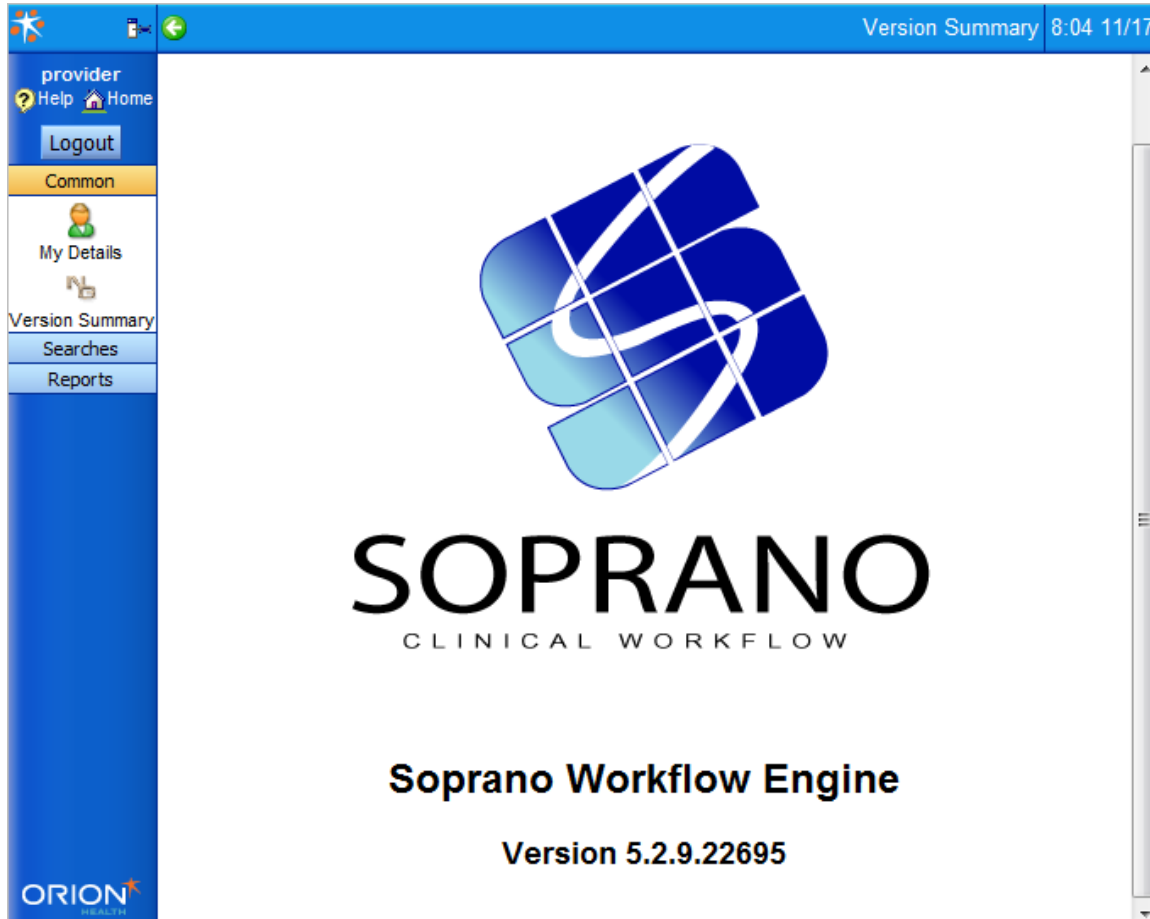
NIR Version Summary Screen

a. National User Management

National Immunisation Register (NIR) **National Administrators** are responsible for setting up and maintaining NIR National and DHB administrators on the NIR.

NIR **District Health Board (DHB) Administrators** have a similar level of access to NIR as national administrators, except that they do not have access to the Rhapsody Messaging tools and the NIR Reference Table Manager.

NIR User Categories

NIR Administrators are able to create and manage the following user categories:

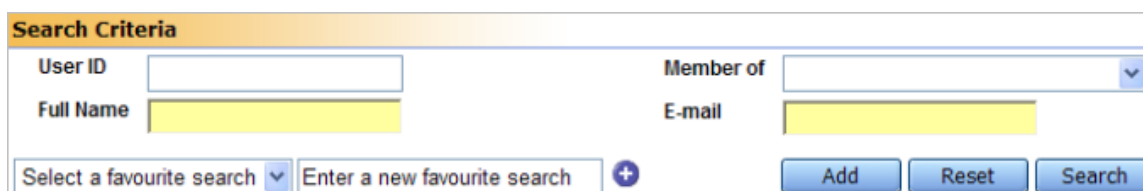| User Category	Description
Provider Browser	Any provider who maintains records via a browser over the Health Intranet. Provider Browsers are not PMS providers who use their own PMS systems
Data Enterer	A Data Enterer is any person who records immunisation events on behalf of a provider, such as a GP. They can perform the functions of a Provider Browser, with the difference being that data enterers can only process tasks for a specified list of providers
Non-Vaccinating Provider	A provider who is *not registered* on the system as someone who performs vaccinations. They cannot modify or record information, they may only use the system to access status query or other defined reports
Identifiable Reports Browser	This group includes Medical Officers of Health, PHO and members of the MOH MVS Data Management Group and will have access to identifiable information reports only
Non-Identifiable Reports Browser	This group includes IPA, PHO, Medical Officers of Health, DHB funding and planning, MOH NIP, MOH MVS Data Management Group, MOH NZHIS NIR IT system and analysts, MOH directorates, District Immunisation Facilitators, Research Institute, Environmental Science and Research, CARM (Centre for Adverse Reaction Monitoring) and NIR auditors and evaluators. They have access to Non-Identifiable Reports only
Status Query Browser	This group includes Medical Officers of Health. MOH MVS Data Management Group members and CARM. They are able to query an individual's record to determine his or her immunisation status
MDIP Data Enterer	Users employed by MOH to enter data relating to the MeNZB programme into NIR

MVS Data Management and CARM	Provides MVS Data Management with the ability to search and view any data within NIR for those individuals who are on the MeNZB programme; i.e. have received or have a scheduled MeNZB event. This access will be read only. MVS Data Management users can be set up with access to all data (via a national option) or to specific data (via a DHB option). Immediate NIR lookup is required for MVS Data Management on a daily basis with up to 50 patient lookups a day, for safety monitoring. Because of the possibility of new signal or cluster investigations, this lookup facility must be available 7 days a week. CARM users also need the ability to perform daily lookups

NIR User Categories

NIR User Search

The **User Search** screen is used by the national administrator to either locate and edit the account details of a registered NIR user, or to create an account for a new national or DHB administrator.

To access the **User Search** screen, select the **Concerto Users** icon in the **Concerto** menu.

User Account Search Options

Search Criteria

The **Search Fields** are used to filter the list of results returned by a search.

Criteria	Description
User ID	The name used to log in to NIR. It can include both letters and numbers and is not case sensitive. This is the only field carried through when a new user is added
Member of	The groups the user is associated with. Group membership controls what you see and can do in NIR
Full Name	The user's full name. Specify *firstname lastname* or *lastname*, *firstname*
E-mail	The user's email address
Favourite Search	Use to save and quickly recall useful searches

User Search Criteria

Favourite Searches

A **Favourite Search** is a set of criteria that have been saved for future re-use. An existing favourite search can be selected from the drop-down list of choices. Add a new favourite search by entering criteria, providing a unique name for the search and clicking the **Add** icon

A Favourite search is associated with the user who created it and can be accessed from any machine he or she logs on to. No other user can see another's favourite searches.

Search Results

The results returned by a search are listed in the **Search Results** panel. Click anywhere in the row corresponding with a user to open his or her Details screen, from which their password, roles and personal attributes may be edited.

Column	Description
❌	Remove a user's record from NIR. This is used only to delete *invalid records*. For users who are no longer active, the usual action is to retain the record but disable the account
↻	Rename the user's **User ID**
User ID	The user's (unique) identifier specified at log in
Full Name	The user's family name followed by his or her given name
Email	The user's email address
Description	A description of the user, usually in terms of his or her role or permissions
👤	Clicking the **User Details** icon has the same effect as clicking elsewhere in the row, and opens the **User Details** screen

Click the *Printer friendly version* link at the bottom of the screen to export the results list into Adobe® Reader®, from where it may be printed and/or saved.

Adding a User Account

The first step in adding a new NIR user is to click the **Concerto Users** icon in the **Concerto** menu. Enter a **User ID** for the new user, using the standard format for names with up to six characters of the surname followed by two characters of first name; e.g. Max Headroom = Headroma. Concerto will check to ensure that the User ID you specify is unique, and will not allow you to continue if it is not.

> ⚠ When adding a new account, only the User ID is required. All other information will be discarded when the **Add** button is clicked.
>
> A user-id prefix must precede the user's User ID; this will identify the type of user he or she is. E.g. a Provider Browser's User ID will be preceded by 'pb_'.
>
> User IDs are not case-sensitive.

Searching for an Existing User Account

User Details Screen

The **User Details** screen is made up of two parts:

1. **User Details** - identifies the user's group membership and their **Account** and **Password** policies
2. **User Attributes** - contains specific details relating to the groups to which he or she belongs

User Details Screen

Group Membership

The User Groups to which a user belongs defines the screens he or she is able to see and edit and reflects their role in the Ministry of Health. All users will be automatically added to the **Users** group, which provides the most basic level of access to the NIR System.

Group Membership Allocation

Select the user group in the right hand panel followed by the **Arrow** icon ⬅ to move the item to the *Member of* panel. Multiple selections can be made by holding down the `Ctrl` key while clicking. Group membership for the different user types are listed in the table below.

UserID Prefix	User Type	Groups to add the User to
nna_	National NIR administrator	Users, Workflow Engine administrators, Workflow Engine users, NIR National administrators
dna_	DHB NIR administrator	Users, Workflow Engine administrators, Workflow Engine users, NIR DHB administrators
pb_	Provider Browser	Users, Workflow Engine providers, NIR Provider Browsers
de_	Data Enterer	Users, Workflow Engine Data Enterers
nvp_	Non-Vaccinating provider	Users, NIR Non-Vaccinating provider
irb_	Identifiable Reports Browser	Users, NIR Identifiable Reports
nirb_	Non-identifiable Reports Browser	Users, NIR Non-Identifiable Reports
sqb_	Status Query Browser	Users, NIR Status Query
mdip_	MDIP Data Enterer	Users, Data Enterer - MDIP, Workflow Engine administrators, Workflow Engine users, NIR National administrator
mvs_	MVS Data Management	Users, Workflow Engine Users, NIR Status Query, NIR Non-Identifiable Reports, NIR Identifiable Reports, MVS Data Management & CARM

NIR User Prefixes

Once the user's *Group Memberships* have been allocated, click the **Save** button; this will load and display the correct *User Attributes.*

Account Policy

A user's Account and Password policies follow NIR standards, as shown in *Account and Password Policies.* Alternative policies (if they exist) are available from the drop-down lists.

Account and Password Policies

Click the **Configure** button corresponding to the **Account Policy** to edit its configuration details.

Configuring an Account Policy

Account Options	Description
Account disabled	Check this box to *disable* an account. Saving the change will result in the User being denied access to the NIR
Temporary Account	Check this box and then select **Active From** (start) date and the **To** (end) date. This will restrict the user to using the system for a defined period of time. The account will become disabled after the *To* date
Limit User Logins	Check this box and select the number of times a user can log in before their account becomes disabled. The **Logins Remaining** value is dynamic, displaying the user's remaining number of logins

Account Policy Options

Password Policy

Click the **Configure** button corresponding to the **Password Policy** to set or change a user's password.

Change Password

Password Options	Description
New Password	The new password must include at least six characters, with letters (case sensitive), numbers and special characters
Confirm	Repeat the new password to confirm choice
Force Password Change	If checked, the user will be able to use this password only once, after which they will be required to provide a new password of their own choosing. Used for both new users and when an existing user has forgotten his or her password

Password Options

Once your options are complete, click the **OK** button. The new user will need to be informed of their User ID and Password.

User Attributes

NIR generates a **User Attributes** list for each user based on the groups to which he or she belongs. The information contained in these attributes is often specific to the user's role; e.g. the **Provider Browser** attributes shown in *User Attribute Fields* include the user's provider ID number and the name of the organisation which issued it.

User Attribute Fields

The user attribute fields are:

Field	Description
Description	Description of the User Role and Relationships
E-mail	User's E-mail address for contact purposes
Full Name	Full Name of user in *first name*, *family name* order
DHB	The DHB with which the user is aligned
DHB Description	The DHB's display value, not its coded value
WE Provider ID	Workflow Engine Provider ID. Should be the same as the Provider Registration number entered in the NIR Provider Details screen
WE Provider Namespace	The provider's identification type, typically NZ Medical Council (NZMC) or New Zealand Nurses Council (NZNC)

User Attribute Fields

Once all attributes, group membership and account/password details have been confirmed, click the **Save** button to save all data, close the Details screen and return to the **User Search** screen.

The new or changed account is now ready for use.

b. Individual Search (National)

Click the **Individual Search** icon 🔍 in the **Searches** menu to display the Individual Search screen. This screen allows you to search for an individual or group of individuals matching the search criteria you specify.

Individual Search Criteria

> ✅ Provider browser users can only search for individuals associated with their clinic; as a result the DHB field is read-only. The medical records of individuals associated with other clinics or DHBs can be located by a Status Query Search.

Individual Search Criteria

The **Individual Search** screen includes the following criteria:

Criteria	Description
NHI	The National Health Index number - unique to every patient. If entered, no other criteria need be specified
Name	The individual's first and last name must be specified using the format 'firstname familyname' or 'familyname, firstname'. This information can be partial; e.g. searching for 'Harr' will return individuals named 'Harry' and 'Harrison'. Name information is not case-sensitive. A wildcard can be used in a name; e.g. 'smart, %well' will return all individuals with the familyname 'Smart' and whose first name ends with the string 'well'
Programme	The search returns individuals registered on the selected programme
DHB	The DHB with which the individual is associated

Date of Birth	The individual's date of birth, in *dd/mm/yyyy* format. Either enter the date manually or use the **Calendar** icon 📠. If entering manually, the **Invalid** icon 🚫 changes to **Valid** ✔ when the date is recognised
Place of Birth	Click the **Search** icon to locate the individual's place of birth and associated domicile code. Click the **Reset** button to clear this field
Age Range	The range (in years) in which the individual's age lies. This can be used if you are not sure how old the individual is. Type the lowest possible age in the **From:** field, and the highest possible age in the **To:** field. Enter *either* the individual's Date of Birth *or* an Age Range; not both
Database Status	The individual's Status in NIR. The default status is `return all statuses` (blank) with other options: `Active`, `Inactive`, `Deceased`, `Opt-off`, `Overseas`, `Provisional Opt-off` and `Deceased Unconfirmed`
Gender	The gender of the individual. The possible values are `Male`, `Female`, `Indeterminate` and `Unknown`

Favourite Searches

A **Favourite Search** is a search that contains frequently used criteria. It is saved using an appropriate name and can be recalled at any time to quickly list the matching individuals.

Selecting a previously created Favourite Search from the drop-down list of saved searches immediately lists the matching individuals. Add new favourites, or remove existing ones, by clicking the corresponding **Add** or **Delete** icons.

Individual Search Results

Click the **Search** button to return a list of individuals whose details match the criteria you have specified. These are listed in the Search Results panel.

NHI	Name	Date of Birth	Address	Gender	Notes Available	
AAB3548	DAVIS, Donna Marie	01/01/2008	107 Beach Road Tauranga	Male	No	
AAB3599	EDEN, Betty	01/01/2007	107 Beach Road Tauranga	Male	No	
AAB3815	JENNA, Margaret	01/01/2008	107 Beach Road Tauranga	Male	No	
KKA0016	MAINE, Susan Joy	21/02/1995	56 Beach Road Tauranga	Male	No	
SPP2528	NEUFEL, Gerta	04/12/1972	10 Beach Road Matua Tauranga	Male	No	

Printer friendly version Download CSV results

Individual Search Results

Up to ten names can be displayed following a search. If more names are available, navigation icons appear at the bottom of the screen which allow the next (or previous) block of results to be displayed. If no results are returned, a message will be displayed to this effect, and you should broaden the criteria before repeating the search.

Search Results are displayed in columns. Click a column title to sort the display by that column; click a second time to reverse the sort. The information contained in each of the columns is described in the following table:

Column	Description
NHI	The individual's NHI number
Name	The individual's name (last name appears first)
Date of Birth	The individual's date of birth, in dd/mm/yyyy format
Address	The individual's current address
Gender	The gender of the individual
Notes Available	If *Yes*, one or more notes have been added to the individual's record by an NIR administrator. Providers are not able to view a note's contents
NIR Icons	Icons providing direct access to the corresponding NIR screen. Refer to NIR Screens for details

Individual Search Results

Search Unsuccessful

If a broader search still returns *No Results Found*, the **Status Query** search is available to extend your search beyond the NIRS to the NHI Database. Refer to Status Query Search for details.

c. NIR Screens (National)

Individual Details

The **Individual Details** screen for a selected individual holds his or her personal, contact and family information, along with details on their current status within the National Immunisation Register (NIR). Fields marked with an asterisk (*) are required; the individual's record cannot be saved if one or more such fields are blank.

The **Individual Details** screen is opened by clicking the **Individual Details** icon , located in two places:

1. The **Search Results** screen
2. The **Context Menu** once an individual's record has been selected

> ✅ Providers will only be able to open details for individuals they have been aligned with, either as the nominated or associated provider. If a provider is not aligned to the selected individual and still wishes to view the record, it may be accessed following a Status Query Search.

The Individual Details screen is divided into a number of panels, each of which is described in the following section:

Identification

The **Identification** panel contains the individual's National Health Index (NHI) identifier, along with their primary and alias names.

Field	Description
NHI	The individual's unique National Health Index number
Name	The individual's **Title**, **Family Name** and **First**, **Second** and **Third** names
Alias Names	Other names by which the individual is known; e.g. a maiden name or alternative first name(s)

Individual Identification Details

To add an alias, enter the details in the **Alias Names** fields and click the **Add** icon.

Editing or Deleting Alias Details

Click the row corresponding with the alias details you wish to amend or remove. From the resulting context menu, select:

- **Edit** - to open the existing alias details in a new window, from where they may be amended

Editing an Alias

- **Delete** - to remove the selected alias details from the individual's record

Birth and Family

The **Birth and Family** panel lists the individual's birth, gender and ethnicity details.

Field	Description
Date of Birth	The individual's date of birth in *dd/mm/yyyy* format
Place of Birth	Records the **Maternity Facility** where a child was born (including home birth). This field is typically populated by maternity download messages that register most individuals on the NIR. The individual's place of birth cannot be entered directly; click the **Search** icon to locate the required information

Date of Death	The individual's date of death in *dd/mm/yyyy* format (only specified when the individual's death is known for certain). This action changes the individual's **Status** to `Deceased` and cancels all scheduled tasks
Gender	The individual's gender
Marital Status	The individual's marital status
Ethnicity	The individual's ethnicity. Multiple ethnicities may be entered, with the first indicated ethnicity considered to be the primary

Birth and Family Details

Place of Birth

The **Place of Birth** field is used to record the **Maternity Facility** where the child was born (including home birth). This field is primarily populated by maternity download messages that register most individuals on NIR.

Setting Place of Birth

The field can be populated or updated by searching for the facility using the **Search** icon, which opens *Place of Birth Pop-Up Search*:

Search Criteria			
Code		Description	

Reset Search

Search Results

Code	Description
4029	Akaroa Community Hospital
3111	Ashburton
4114	Bay of Islands
8457	Birthcare Auckland
8523	Birthcare Huntly
3240	Botany Downs Maternity Hospital
5918	Buller
4013	Burwood
8566	Charlotte Jean Maternity Unit
4030	Chathams Hospital
4014	Christchurch Womens
4316	Clevely Health Centre
8569	Clutha Health First
D466	CMDHBLMC
8561	Dannevirke Community Hospital

>>

Place of Birth Pop-Up Search

Enter appropriate search criteria or scroll through the list until the required maternity facility is displayed. Select by clicking anywhere on its corresponding row; this closes the pop-up search and imports the chosen facility into the **Place of Birth** field on the Individual Details screen.

Registration Status

The default **Status** for individuals is `Active`, which means that **Task Update** messages will be generated and sent whenever an immunisation task becomes due.

Field	Description
Status	The individual's current NIR status
Change to	A drop-down list of Status options that can be associated with the individual's record
Updated By	The name of the process or individual who last updated this record. This information is automatically added at the time the record was updated

22

DHB	The DHB the individual is associated with, based on their entered address. DHB administrators are able to change the DHB of individuals in their region only; for all other individuals this field will be read-only. National administrators are able to change the associated DHB for any individual
Source of Record	This is a read-only field that is only populated for records migrated from Kidslink, and identifies the DHB to which they initially 'belonged'
Registration Date	The date the individual was first registered with NIR
Confirmation of Amendment... Letter	If selected, NIR will generate a letter which can be sent to the individual or his/her parents/guardians requesting their confirmation of any changes made to the individual's NIR status

Registration Status Details

Changing an Individual's Status

When an individual's status is changed to any value other than `Active`, the Registration Panel expands to include two further options, shown in *Status Change Options*:

Status Change Options

- **Effective Date** - the date from which the status change is effective
- **Reason** - the text of the reason for the status change

Status Change Options

- **Deceased Unconfirmed** - an individual's death is suspected (e.g. a newspaper death notice). Overdue task messages will not be generated
- **Deceased** - an individual's date of death is known and can be entered in the **Birth and Family** panel
- **Inactive** - typically used when the record has been created in error. The status of all associated programmes is automatically changed to `Inactive`
- **Overseas** - the individual is not available for continued programme participation. No task reminder messages will be generated and the individual's status in all programmes changes to `On-hold`
- **Provisional Opt-off** - If selected, a **Confirmation of Opt Off** letter is generated requesting written acknowledgement from the individual or their parent/guardian that they wish for no further involvement with the NIR. Once this acknowledgement has been received, the individual's status is changed to `Opt-off`; only then will their contact details be deleted
- **Opt-Off** - the individual (or their parent/guardian) does not want their immunisation events or demographic information recorded in NIR. This option is not available if a MeNZB vaccination has been given

When an individual's status change from `Active` is saved, all other fields become read-only.

Alerts

The **Alerts** panel contains checkboxes which are automatically selected, and their labels displayed in red whenever an **Adverse Reaction** or **Contraindication** is recorded by the provider and verified by CARM (Center for Adverse Reaction Monitoring) for the individual receiving an immunisation.

Alert Notes can be added by the provider to further describe the nature of the alert.

Alert Details

Contacts

The **Contacts** panel lists the different ways in which the individual, or his or her parents/guardians, can be contacted. New contact details are added by selecting a **Contact Type** from the drop-down list, followed by entering matching information into the **Contact Number** field. Click the **Add** icon to complete the process.

Contact Details

Editing or Deleting Contact Details

Right click the row corresponding with the contact details you wish to amend or remove. From the resulting context menu, select:

- **Edit** - opens the existing contact details in a new window, from where they may be amended
- **Delete** - removes the selected contact details from the individual's record

Addresses

An individual must have a `Current` address, although `Business`, `Mailing` or `Permanent`) address types can also be specified. When entering or editing an address, be sure to specify its **Effective Date**; the date from which the change applies.

Editing or Deleting Address Details

Click the row corresponding with the address details you wish to amend or remove. From the resulting context menu, select:

- **Edit** - to open the existing address details in a new window, from where they may be amended

Amending Address Details

- **Delete** - to remove the selected address details from the individual's record

Address Geo-Coding

The current address is linked to a Geo-Coding system that determines the DHB that the individual is resident in. This sets the DHB value at the top of the **Individual Details** screen and also populates the X and Y co-ordinates, which can be viewed through the **Individual History** screen. The DHB value automatically assigns the record to the correct DHB administrator for record maintenance and support.

Because of geo-coding restrictions, all addresses must match actual, physical locations. To prevent errors, do not include abbreviations - e.g. use 'street' rather than 'st'. If an unrecognised address is specified in, e.g. a new suburb, notify the individual's DHB administrator. He or she will in turn notify the geo-coding company to request an update to their software.

Correcting an Address

When an unrecognised address is entered, a dialog is displayed with the following options presented to the user:
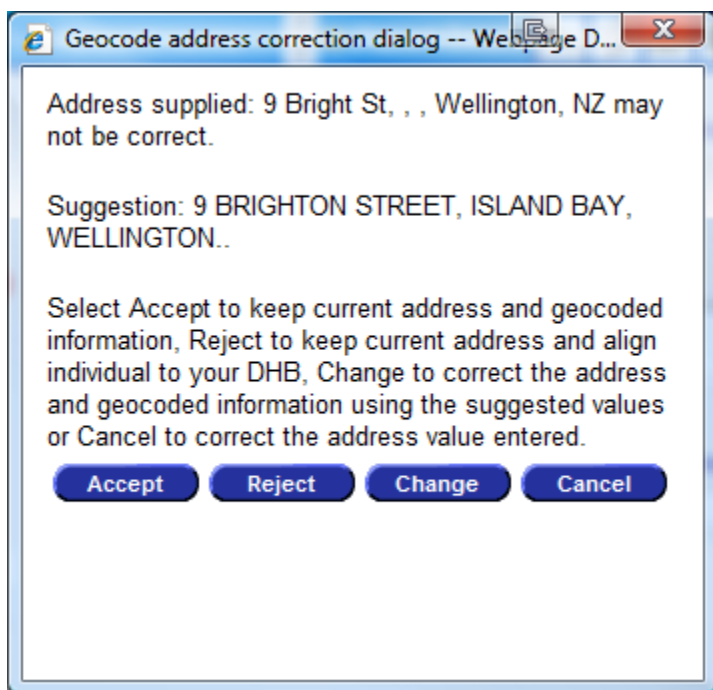
Geocode Address Correction Dialog

- **Accept** - retains the address as entered. The address will be geo-coded using the suggestion on the Geocode Address Correction dialog. The individual's associated DHB will be changed to match the DHB in which the suggested address is located
- **Reject** - retains the address as entered. The individual's associated DHB will be changed to match the current user's DHB
- **Change** - replaces the entered address with the one suggested on the Geocode Address Correction dialog. The individual's associated DHB will be changed to match the DHB in which the suggested address is located
- **Cancel** - closes the dialog so that the entered address can be manually edited

Parent/Guardian

All individuals registered with the NIR up to the age of 16 must have associated parent/guardian details. New parent/guardian details can be entered by clicking the **Add** icon in the Parent/guardian panel, or details that no longer apply can be removed by clicking the **Delete** icon.

By default, existing parent/guardian details are hidden. Expand the panel to display these details by clicking the **Maximise** icon ⊞ alongside the caregiver's name; his or her details can then be amended using the same techniques as described in the **Individual Details** panels.

Parent/Guardian Details

> ⚠ The NHI field for a parent/guardian is not required on the NIR. This field is also not validated, so it is important that if a parent/guardian's NHI is specified, it is entered accurately.
> Multiple parent/guardian details can be entered; click the **Add** icon as many times as required - but note that only one can be identified as the primary caregiver.

History

An individual's **History** screen records changes that have been made to their NIR contact and other details. Historical details are displayed in black type; current details are coloured.

Full History

INDIVIDUAL - KKA0016, born on: 21/02/1995

General Individual Details
* RENEE LILY Draver (21/02/1995) (Male)

Database Status

Status	Date Effective	Changed by	Reason
ACTIVE	16/01/2006		

Ethnicities
* Pacific Island not further defined
* European not further defined
* NZ European / Pakeha

Address List

Address Type	Address Details	Domicile Code	Date Effective	Geocode X	Geocode Y
Current	56 Beach Road Tauranga		19/01/2004	2787734	6388282

DHB List
* Bay of Plenty

Birth Place List
* Tauranga

PARENT/GUARDIAN - Father, SPP2137

Parent/Guardian Name
* Tamara Dean (Unknown)
* Bruce K Stallone (Unknown)

Address List

Address Type	Address Details	Domicile Code	Date Effective	Geocode X	Geocode Y
Current	Not Specified Not Specified		16/01/2006		
Current	Not Specified Not Specified		16/01/2006		

Print

Individual History Screen

The History screen is accessed by clicking the **History** button at either the top or bottom of the **Individual Details** screen. The following fields are included in an individual's History, provided they contain data:

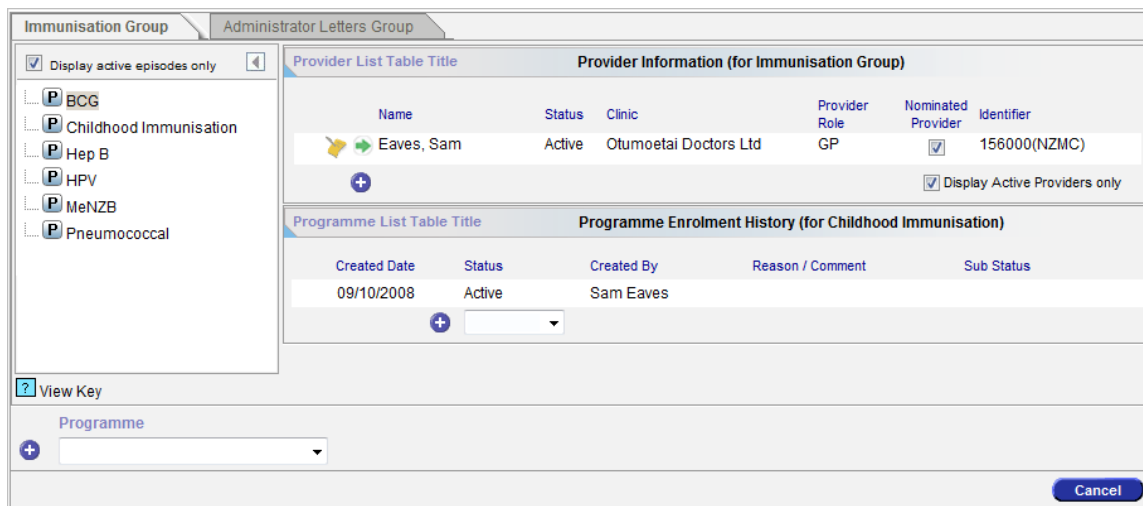| Field	Description
Individual	The selected individual's NHI number and date of birth
General Individual Details	Record of Name(s), Date of Birth and Gender updates
Alias Name List	Record of Alias updates
Database Status	Displays record of Database Status changes, along with any reasons given
Contact List	Lists Contact Details updates (phone, fax, email addresses etc). This information, along with Address changes, is especially interesting to Outreach providers
Ethnicity List	All updates to Ethnicity for the individual
Address List	Displays all address details i.e. Type, Address Details, Domicile Code, Date Effective, Geo-code X and Y values
DHB List	DHB alignment history
Place of Birth List	Place of birth history. This value should be static, but the user is able to update if a wrong place of birth is assigned to the individual
Parent Guardian	Parent/Guardian Relationship, NHI and Primary status
Parent Guardian Name	History of name changes by parent/guardian

Individual History Details

The History screen is *Read-Only* and is updated by changes saved in the Individual Details screen. Hovering the mouse pointer over an historical item displays a tooltip identifying when the corresponding information was changed, along with the name of the user who made the change.

The information in the historical record may be printed.

Medical Details

The **Medical Details** screen displays a list of the programme groups and programmes the individual is registered on along with their status history in each one. The screen is organised into grouped tabs, each of which lists the programmes associated with that group. In the example shown in *Medical Details Screen*, the **Immunisation** group lists the immunisation programmes the individual is associated with, along with his or her status in each one.

Open an individual's Medical Details screen by clicking the **Medical Details** icon either in the list of names returned by a search or in the Context Bar once an individual's record has been selected. A typical example is shown in *Medical Details Screen*:

Medical Details Screen

Further tabs can include:

- **Administrator Letters Group** - listing the letters not associated with a particular programme (such as a confirmation letter generated whenever an individual's demographic details change) that have been, or are to be, generated for the individual
- **Administrator Programme Group** - used by the **Outreach** programme to record contact attempts for those individuals who have proved hard to reach

<Programme> Group Panels

An individual's <programme> group **Medical Details** screen is divided into three panels:

1. **Programme List** - the programmes the individual is or has been registered on
2. **Provider Information** - the providers who are responsible for completing the tasks associated with the individual's enrolled programmes
3. **Programme Enrolment History** - the changes to the individual's enrolment history in a selected programme

Programme List

The **Programme List** panel lists the programmes the individual is or has been registered on. Programmes are grouped under a descriptive name which appears as a tab label at the top of the screen. This implementation of NIR includes the **Immunisation** programme group only, with five associated programmes:

1. BCG
2. Childhood Immunisation
3. Hep B
4. HPV (funded for females only)
5. MeNZB
6. Pneumococcal

Viewing the Programme List panel can be toggled by clicking the **Hide Tree** icon ◀. When this panel is hidden, more screen space becomes available for viewing Provider and Enrolment History data.

Display Active Episodes Only

If the **Display Active Episodes Only** checkbox at the top of the Programme List is selected, only those programmes whose status is not **Deleted** will be listed.

Associating a Programme with an Individual

If you wish to enrol an individual in a programme from the Immunisation programme group, scroll to the bottom of the screen and select it from the **Programme** drop-down list. Click the **Add** icon to add the programme to the list.

> ⓘ When you enrol an individual in the **Pneumococcal** programme, a `Schedule Initialisation` task will be created in the **Task List** panel of the **Full Task List** screen. Processing this task, triggers the generation of the PCV tasks.
>
> Refer to ***Processing a Task*** in the ***Full Task List*** section for details on how to process a task.

If an individual is enrolled by mistake onto a programme, that programme cannot be removed from their record. The solution is to change the individual's enrolment status in the programme to `withdrawn`.

View Key

Each programme appearing in the Programme List has an associated icon that identifies the type of programme it is. A **Key** describing each icon option is available by clicking the **View Key** link at the bottom of the screen; an example is shown in *View Programme Key*:
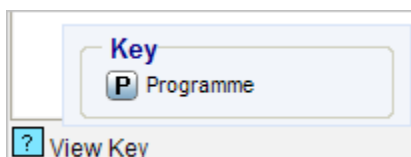
This implementation of NIR includes the **Programme** option only.

Provider Information

The **Provider Information** panel lists all providers associated with an individual and who are responsible for completing the tasks associated with any programmes that he or she is enrolled in. The title of this panel identifies the currently selected Programme Group.

Provider information appearing on this panel is organised into columns:

Field	Description
Name	The provider's Family and First Name(s)
Status	`Active` providers are always displayed. Clearing the **Display Active Providers only** checkbox will result in all providers who have had a previous association with the individual being listed, along with their current status
Clinic	The Clinic name with which the provider is associated
Provider Role	The nature of the provider's association with the individual. Typical values are `GP`, `Lead Maternity Caregiver` and `Well Child Provider`
Nominated Provider	The provider primarily responsible for maintaining the individual's association with the programme and who will receive **Task Update** messages when a task is processed by another provider. There can only be one nominated provider per Programme Group
Identifier	The identifier assigned to the provider, which typically is their `NZNC` or `NZMC` number

Provider Details

A provider is associated to an individual's record in three ways:

1. Through the Maternity Download (which can also set the Nominated flag)
2. Through the completion of an immunisation task
3. Manually associated by an administrator

Only administrators are permitted to modify the **Nominated Provider** flag, the provider's **Role** in regard to the individual and to add or delete providers from the list. Providers who are not the nominated provider are known as Associated Providers.

Programme Enrolment History

Selecting a programme from the individual's **Programme List** displays a list of details relating to their enrolment status in that programme. This information is read-only for Provider Browser users but is editable by DHB or National NIR administrators.

An individual's Enrolment History is organised into columns:

| Column	Description
Created Date	The date the individual was registered on the programme. If an individual's enrolment status has changed, the date on which this occurred will appear in this column
Status	The current and historical enrolment status of the individual in the selected programme. The individual's current status in this programme is listed first
Created By	The **User ID** of the person who changed the individual's status
Reason / Comment	The text of the reason or comment recorded at the time of the status update. An individual registered with Outreach, e.g. will display the comment '*With Outreach*'
Sub Status	Further information relating to the individual's **Status** in the selected programme

Programme Enrolment History

Programme Status Options

The status options that an individual's involvement with a programme's can have are:

- **Active** - specified when the individual is participating in all programme activities
- **Inactive** - automatically specified when an individual's registration status on the **Individual Details** screen is changed to `Deceased Unconfirmed`, `Deceased`, `Provisional Opt-off` or `Opt-Off`
- **Deleted** - typically specified to correct a programme enrolment mistake. A status change to Deleted can only be performed if the associated programme does not include any completed tasks. Programmes whose status is Deleted will not be displayed in the **Programme List** if the **Display Active Programmes Only** checkbox is selected
- **Not Eligible** - specified when an immunisation has been given concurrently with a MeNZB vaccination and the individual does not fit within the birth cohort. The child must be enrolled in the Immunisation programme in order to record what has been given, but he or she is not then eligible for further follow up in that programme
- **On Hold** - specified when a child temporarily ceases their involvement with the programme. No update reminders will be generated. The status automatically reverts to `Active` if a task update message is received after the effective date, except for when it is `On-hold with Outreach`, where *any* incoming update message will result in a status change to `Active`. A child's status in all programmes is automatically changed to `On Hold` if their registration status is changed to `Overseas`
- **Withdrawn** - specified when an individual (or their parent/guardian) ceases further involvement with the programme. A reason must be provided whenever `Withdrawn` is selected, and further information may be provided as free text

Reason/Comment

Some programme enrolment history screens may have a **Flag** icon ❦ displayed in the **Reason/Comment** column; this indicates that an associated message is present. Click the icon to view the message; an example is shown in *Programme Enrolment History Message*:
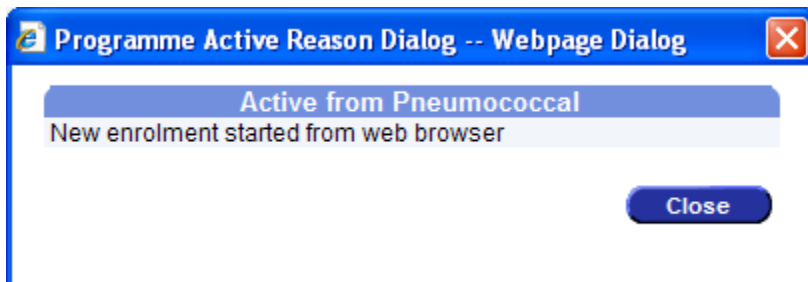

Programme Enrolment History Message

Opting Off When One or More MeNZB Tasks Have Been Completed

The procedure for opting off an individual from a programme when he or she has had one or more MeNZB tasks completed is as follows:

1. On the **Medical Details** screen, select the programme the individual wishes to opt off from
2. Select `Inactive` as the new programme status, and click the **Add** icon
3. In the resulting dialog, select `Opt Off` as the status change reason, followed by an optional reason for the change:
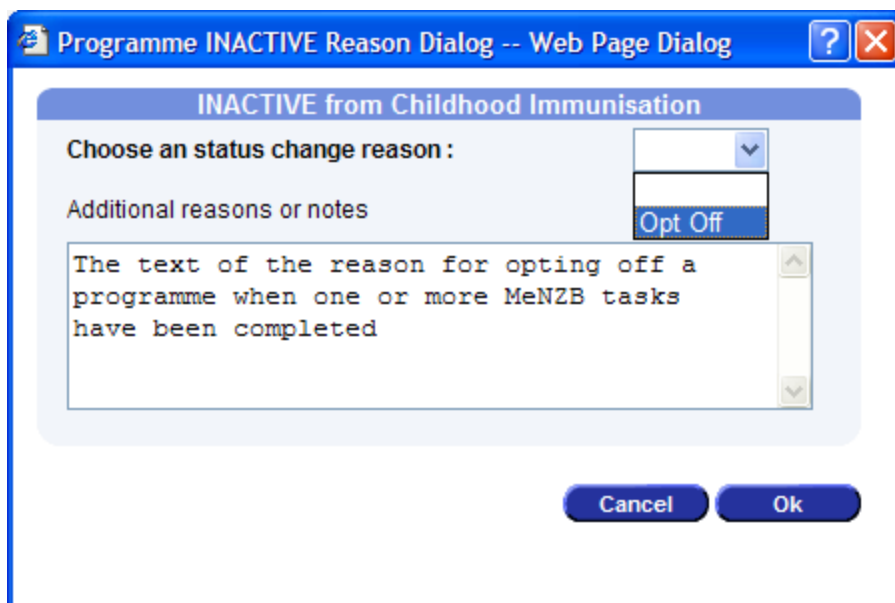
Opting Off When MeNZB Tasks Have Been Completed

4. Click the **OK** button. The Enrolment History panel on the Medical Details screen lists the new status, along with a **Flag** icon which can be clicked to redisplay the reason for the status change:

Opt Off Programme Status

Administrator Letters Group

Selecting the **Administrator Letters Group** tab displays the **Letters** programme along with a list of all letters that have been generated for the individual. An example is shown in *Administrator Letters Group*:

Administrator Letters Group

If an individual's Status in the Letters programme is changed from `Active`, confirmation and notification letters will no longer be generated for the individual.

Enrolling an Individual with Outreach Services

When an individual has missed many tasks and has proved hard to contact, their provider may choose to refer him or her to Outreach Services, who will then take responsibility for locating the individual and either providing the overdue immunisations or ensuring they see their regular provider to ensure that these tasks are completed.

The first step in this process is to locate the individual's record and open their **Medical Details** screen. This is followed by changing the individual's status in the affected programme(s) to On Hold.

Changing Programme Status

Whenever an individual's programme status is changed to On Hold, a reason must be given. From the Status Change drop-down list, choose With Outreach. Other comments may be added as appropriate.

Comments entered here can be viewed at any time by clicking the **Flag** icon 🌿 adjacent to the selected reason on the individual's List Table for the affected programmes.

Click the **OK** button to complete the individual's status change.

Enrolling an individual with Outreach Services is achieved from the bottom of the **Medical Details** screen; select `Outreach Immunisation Services` from the drop-down list and click the **Add** icon.
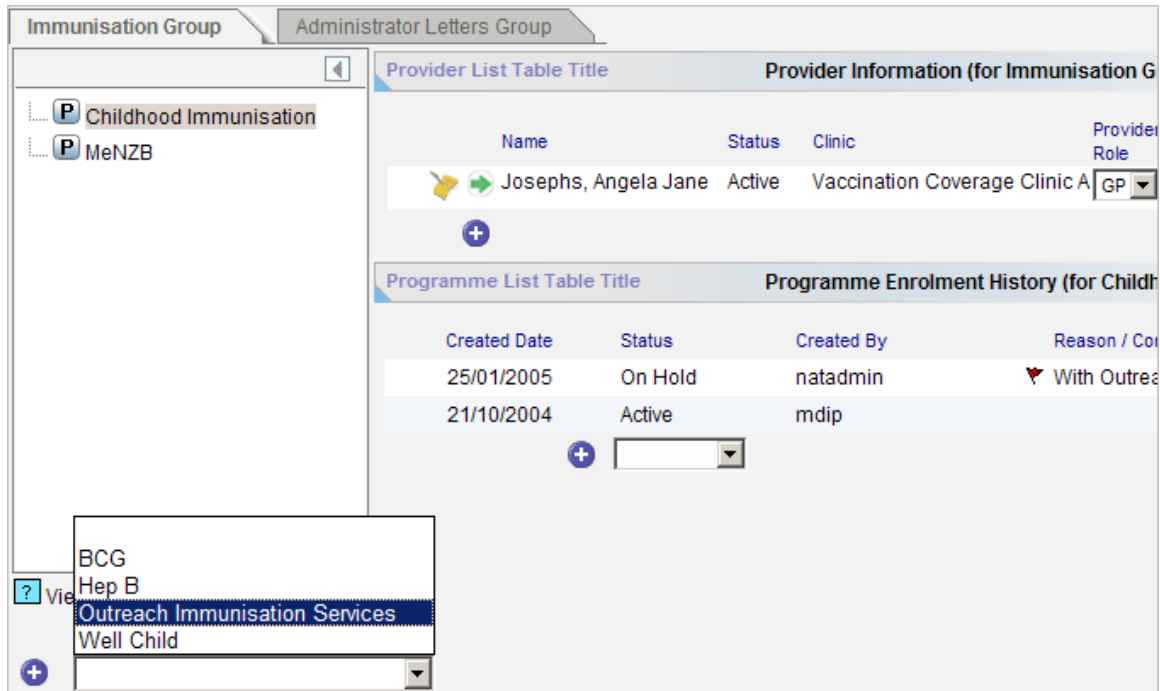
Enrolling an Individual with Outreach Services

A unique **Episode ID** must be generated for each new Outreach enrollment; the default value is the current date which in most cases will be acceptable.
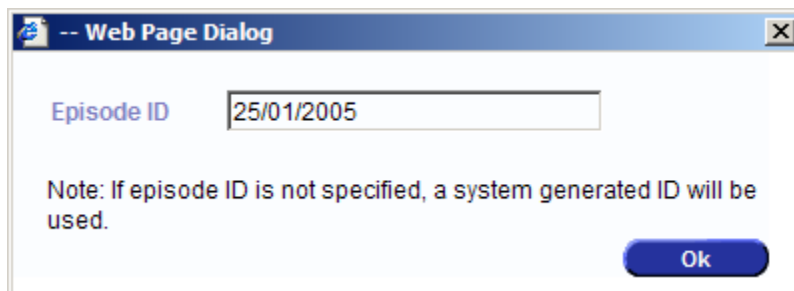
Specifying an Episode ID

The final step is to select the Outreach provider who will take responsibility for locating the individual and ensuring that their tasks are updated. This is achieved from a standard Search screen, in which the provider may be selected by scrolling through the list of returned results or entering criteria to locate the provider of interest.

Specifying an Outreach Provider

Processing Tasks for Individuals with Outreach

It may be that an individual is referred to Outreach Services one day, only to appear at the clinic the next. In such a case, the tasks can be processed for the individual as before. When this is done, the system will automatically revert the individual's programme status to `Active` and show that this change was completed by the `On-hold to Active` process.

Similarly, the individual's status in the Outreach Services programme automatically reverts to *EOE* (End of Episode) with the same process identified as the instigator.

Programme List Table Title		Programme Enrolment History (for Childhood Immunisation)		
Created Date	**Status**	**Created By**	**Reason / Comment**	
25/01/2005	Active	On-Hold to Active process		
25/01/2005	On Hold	natadmin	With Outreach	
25/01/2005	Active	natadmin		

Status Change Following Task Processing

Click the **Flag** icon 🏳 in the rightmost column to view the reason given when the child's status was changed.

Removal from Outreach

Once an individual has been located by the Outreach provider and all tasks updated, the individual's association with Outreach services can be removed. This is achieved by first locating the individual's record and, from their **Medical Details** screen, selecting the **Administrator Programme Group** tab.

Select the **Outreach Immunisation Services** programme and change its statue to *EOE* (End of Episode). Click the **Add** icon to complete the change.

Removing an Individual From Outreach Services

The final step is to return to the **Immunisation Group** tab and select the programme(s) in which the individual's status is *On Hold (with Outreach)*. The status can be changed back to *Active*, although this will occur automatically the next time a task is processed for that individual.

Referring an Individual to Outreach a Second Time

Individuals can be referred to Outreach Services more than once. Where this is appropriate, locate the individual's record and open the **Administrator Programme Group** tab of their **Medical Details** screen. In the Programme panel on the left, select `Outreach Immunisation Services` and click the **Add** icon. A new Episode ID will need to be provided to complete the re-referral.

Before an individual can be referred to Outreach for a second or subsequent time, earlier referrals must have the status *EOE* (End of Episode).

Re-Referring to Outreach Services

The user will now need to return to the **Immunisation Group** tab and change the status of all affected programmes to *On Hold (with Outreach).*

Full Task List

An individual's **Full Task List** lists all completed, current, overdue and future tasks in the programmes in which he or she is enrolled and `Active`. A 'task' in this context refers to a single or combined immunisation, or a checkup with a Well Child GP or nurse.

Rules

An individual's tasks are automatically created at the time of their enrollment by the action of rules which take into account both the New Zealand Immunisation Schedule and the individual's age. The following examples illustrate the action of these rules:

1. when the first shot is given to an individual enrolled in the Childhood Immunisation programme, the rules will determine the dates when follow-up shots will become due
2. if an individual receives his or her 5 month Well Child check, all earlier uncompleted checks will be automatically removed from their schedule
3. if an individual is under the age of six months and is thought to be at-risk for Meningitis B, they will be scheduled to receive four MeNZB immunisation shots. If they are over this age, three shots are scheduled
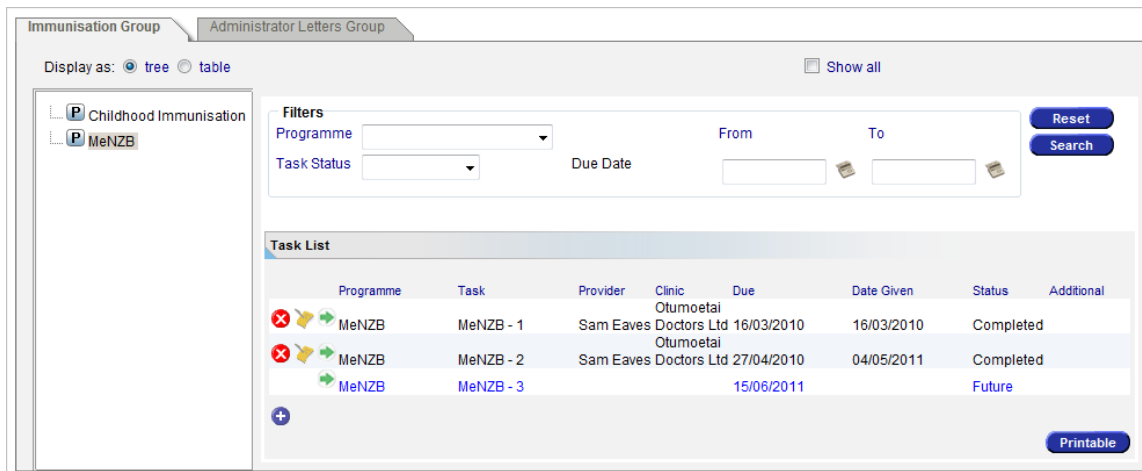
Opening the Full Task List

Open an individual's Full Task List by clicking the **Full Task List** icon   either in the list of names returned by a search or in the Context Bar once an individual's record has been selected.

The Full Task List screen can be displayed in either **Tree** or **Table** view.

Full Task List - Tree View

In **Tree View**, the individual's enrolled and `Active` programmes are listed on the left of the screen, with the filter panel and task list on the right. A user wishing to view the tasks associated with a particular programme must click its name in the tree.

Full Task List - Table View

In **Table View**, the tasks associated with an individual's enrolled and `Active` programmes are listed on screen, below the filter panel. A user wishing to view the tasks associated with a particular programme must select it from the **Programme** drop-down list in the filter panel, then click the **Search** button.

A user is able to view a task's details or enter its processing data from either task list view; the steps are the same.

Filtering the Full Task List

Filter criteria can be applied to the Full Task List in both *Tree* and *Table View* to limit the number of listed tasks. All filter options are initially blank.

- **Programme** - the programme whose tasks you wish to display
- **Task Status** - the status; i.e. `Completed`, `Declined` or `Overdue`, of the tasks you wish to list
- **Due Date** - the earliest and/or latest due date for tasks which are to be listed. Enter the date manually using the format: dd/mm/yyyy or by clicking the **Calendar** icon

Click the **Search** button to refresh the individual's full task list with the specified criteria. Clear all criteria by clicking the **Reset** button.

Show All

Select the **Show all** checkbox at the top of the Filter panel to list tasks whose processing status has been deleted. Such tasks will be displayed in grey text, with an associated **Flag** icon which, if clicked, will identify the user who deleted the task's processing details along with the reason given at the time.

Deleting a task resets its processing status to `Due` on its originally scheduled date. This action is used to correct the situation where a task has been processed in error.

Viewing the Task List

Processed tasks are sorted in the Full Task List by the **Date Given** column, with the earliest tasks to be processed listed first. Due, Overdue and Future tasks are listed by **Due Date**, with the earliest due date listed first.

Information in the full task list is displayed in columns, some of which will be blank depending on the task's Status:

Column	Description
Programme	The name of the programme with which the task is associated
Task	The name of the task
Provider	The name of the provider who processed the task
Clinic	The name of the clinic where the task's processing was completed
Due	The date at which the task is or was due
Date Given	The date on which the task was processed
Status	The task's current status
Additional	Additional information relating to the task's processing; e.g. the reason given at the time a task was declined. A **Flag** icon 🚩 may be present alongside any additional comments; click to open a screen displaying the comment text or other details relating to the task's processing

Task List Details

Task Colour Codes

Colour coding is used to identify the status of listed tasks:

- **Black** - processed tasks
- **Green** - tasks that are currently due
- **Red** - tasks that are currently overdue. Overdue tasks have been due for longer than a trigger period - typically 4 weeks
- **Blue** - tasks that will become due at some future date
- **Grey** (only available when the **Show all** checkbox has been selected) - tasks whose processing details have been deleted

Viewing Task Details

The following icons are present on the Full Task List and are associated with tasks that have been processed:

❌ - delete the task's processing status and reverts it to `Due`

🧹 - view the details recorded at the time the task was processed.

A selected task's details screen is shown in *Viewing Task Completion Details*:

Viewing Task Completion Details

If the task selected for viewing has previously been updated, the names of the users who performed the update are listed in the rightmost panel. Click the **Select** icon alongside the name of such a user to view the details he or she entered.

Printing the Full Task List

Click the **Printable** button to open the full task list in a new window, formatted as it will appear on paper. Use your browser's standard printing options to set the printer and number of copies to be printed.

Processing a Task

The **Task Processing** screen is similar to that shown in Editing Task Details, but with all fields initially blank. If you are a provider who is associated with two or more clinics, as well as entering the required processing details, you will also have to specify the clinic in which the contact with the individual took place. This is done by selecting from the **Clinic** drop-down list at the top of the screen, prior to clicking the **Submit** button when all other details are entered.

Processing a Completed Task

The Details screen for a completed **Immunisation** task is shown in the following screenshot:

When `Completed` is selected, the **Details** drop-down list is displayed, as shown in the following screenshot:

1. Leave the **Details** drop-down list blank, UNLESS the vaccination has been given overseas, in which case you need to select **Given Overseas** from the drop-down list.

   ⚠ If an individual has a significant reaction following a vaccination and an AEFI has been confirmed by the Centre for Adverse Reactions Monitoring (CARM) to the DHB administrator, he or she will then need to locate the affected individual's record and, from their Full Task List, edit the completed task to include an AEFI. Refer to AEFI Alerts for additional information.

2. Add further details before clicking the **Submit** button to complete the processing. If `Given Overseas` was selected from the **Details** drop-down list, the additional fields are not mandatory, as the information may not be available.

Processing a Completed Immunisation Task - Alternative Given

Some tasks, such as those in the Childhood Immunisation programme, involve multiple vaccines given together. There may be instances when an individual, or his/her guardian, wishes to accept some of the antigen components of the vaccine and decline others. In such a case, enter a **Completed** date as normal and specify the **Status** as `Completed`. In the **Details** drop-down list, select `Alternative Given`. This action opens a dialog, listing all the possible antigen components. The antigens which have been given or declined are individually identified through this dialog.

The steps for processing a **Completed Immunisation - Alternative Given** task are:

1. Open the individual's Full Task List.
2. Click the **Select** icon corresponding with the scheduled task, for example, **DTaP-IPV**.
3. Select a status of `Completed` with the details: `Alternative given`.
4. In the dialog that appears, select a status for the components that were actually given to the individual, and a status for those that were declined. NIR will check that all antigen components have been accounted for.

Name	Status
AG-aP-4y	
AG-D-4y	
AG-DT-4y	
AG-DTaP-4y	Completed
AG-IPV-4y	Declined
AG-Td-4y	
AG-TT-4y	

Cancel   OK

5. Click the **OK** button to return to the **Task Completion** screen. Separate tasks will have been created for all components which were given, and those that were declined. Process these as normal and click the **Submit** button to complete the processing.

Processing a Completed PCV Task - Alternative Given

If you administered a Pneumococcal vaccine, for example, **PCV-1**, enter a **Completed** date as normal and select **Alternative given** from the **Details** drop-down list. This action opens a dialog, listing the PCV7, PCV10 or PCV13 vaccines as selectable alternatives.

The steps for processing a **Completed PCV - Alternative Given** task are:

1. Open the individual's Full Task List.
2. Click the **Select** icon corresponding with the scheduled PCV task, for example, **PCV-1**.
3. Select a status of `Completed` with the details: `Alternative given`.

4. In the dialog that appears, select a status of `Completed` for the PCV vaccine that was actually given to the individual, for example:

5. Click the **OK** button to return to the **Task Completion** screen. A separate task will have been created for the alternative PCV given. Process these as normal and click the **Submit** button to complete the processing.

Processing a Declined Task

When an immunisation task is declined, the user must select from the standard list of reasons why the task was declined then, optionally, add further details before clicking the **Submit** button to complete the processing.

Processing a Rescheduled Task

When an immunisation task is rescheduled, the user must select one of the standard reasons why the task was rescheduled before clicking the **Submit** button.

Processing a Closed Task

When an immunisation task is closed, the user must select from the standard list of reasons why the task is to be closed then, optionally, add further details before clicking the **Submit** button.

Processing a Hep B / Serology Task

Hepatitis B serologic test results must be processed.

The steps for processing a Hep B / Serology test task are:

1. Open the individual's Full Task List.
2. Click the **Select** icon corresponding with the Hep B Serology task, for example, **5mth HepB Serology**. Please note that an **8mth HepB Serology** test task is also available.
3. Enter a **Completed** date and specify the **Status**. When `Completed` is selected, the following options are displayed in the **Details** drop-down list:

4. Select the relevant option from the **Details** drop-down list. If `Unprotected` is selected, the **Task List** will be populated with a **HepB high risk - booster or extra dose** task, which can be processed.
5. Click the **Submit** button to complete the processing.

Editing Task Details

The **Select** icon is available on the individual's full task list to update the details of a previously processed task. Enter or select the new information and click the **Submit** button to update the task's details.
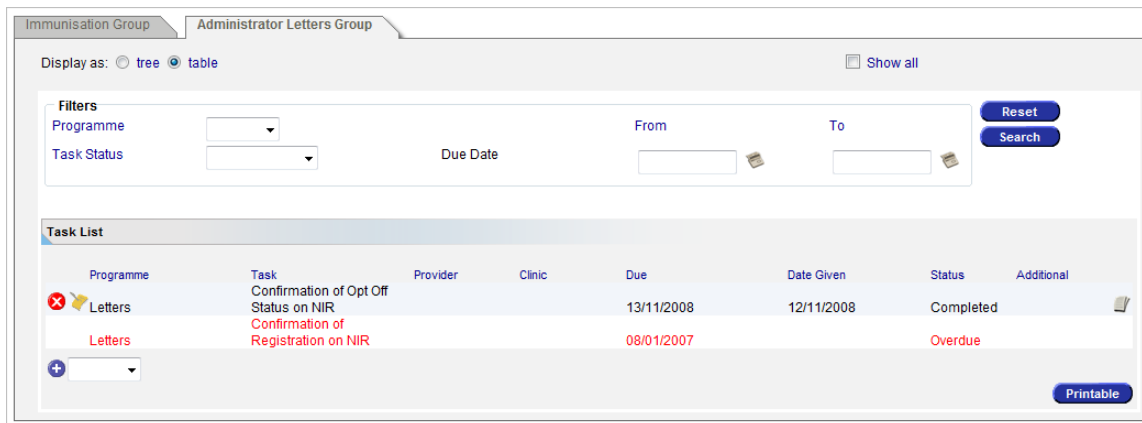
Concurrency

When a MeNZB immunisation is given to an individual on the same day as an immunisation from any other programme, the system will flag those tasks on the Full Task List with the **Concurrency** icon ⚠️.

The presence of this icon is a visual reminder that a MeNZB shot was given concurrently with another immunisation, and that a careful watch should be taken for adverse interactions.

Administrator Letters Group

The **Administrator Letters Group** tab on an individual's **Full Task List** lists NIR programme-related letters that either have been generated and sent to the individual, or which are due to be sent.

The layout of the Letters Group screen is similar to Task layout, with the option to display in Tree or Table view and, for the latter, the option to filter the list. Previously withdrawn letters can be included in the display by selecting the **Show all** checkbox.

Clicking the **Document** icon corresponding with a generated letter opens a preview of that letter.

From the generated letter preview screen, the administrator then is able to:

- Preview and print the letter.
- Edit the letter's contents.
- Save the letter in PDF format.

Manually Adding a Task

Extra or non-scheduled tasks can be added to an individual's programme from the Full Task List, in both Tree or Table view. Click the **Add** icon to display a list of tasks appropriate to the current or selected programme; the following screenshot shows the tasks that may be added to the MeNZB programme. Adjust the **Due Date** as required and click the task's **Select** icon to add it to the individual's task list.
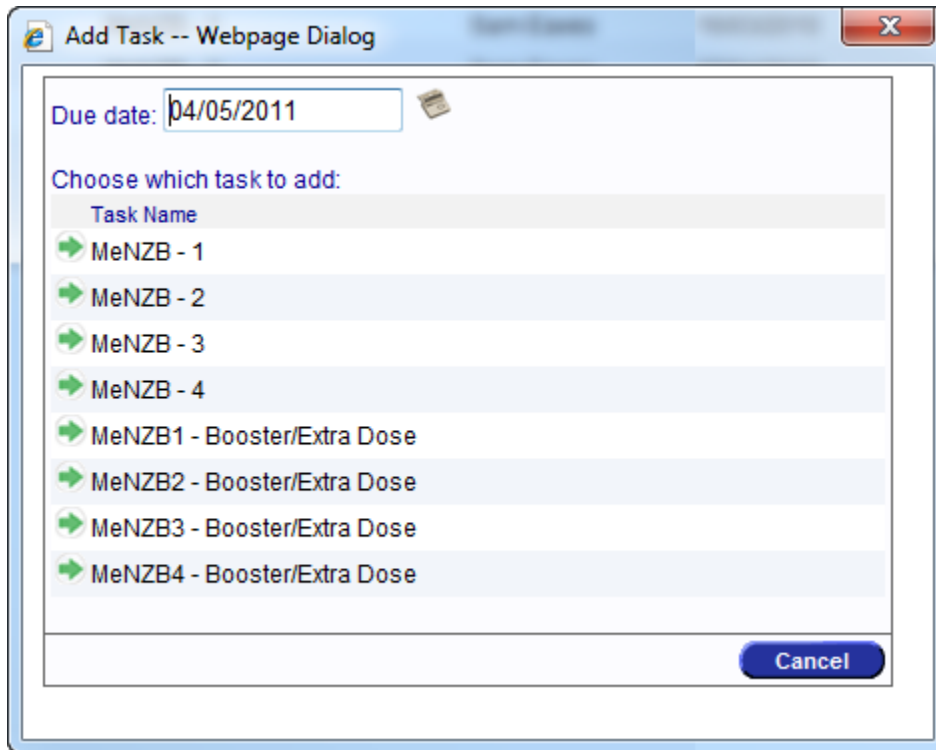
Manually Adding a Child Immunisation Task

When a task is added to the childhood immunisation programme, the task list is usually accompanied by an **Indicator** which identifies the reason for administering the vaccine. E.g. the indicator '6W' shows where the associated vaccine falls on the NZ Immunisation Schedule.

A full list of indicators is given in the following table:

Indicator Value	Meaning	Indicator Value	Meaning
1	Over 65 years (Influenza)	6	Booster or extra dose
2	Under 16 years, eligible condition (Influenza)	7	Post partum
3	Eligible condition (Influenza)	8	Low birth weight
4	Sexual or household contact	9	HepB carrier mother
5	Primary course	10	At risk for TB
6W	Six weeks	3M, 5M, 15M	Three, five and fifteen months
4Y, 11Y, 65Y	Four, eleven and sixty-five years		

AEFI Alerts

When an individual has a significant reaction following a vaccination, the provider who identifies the AEFI (*Adverse Event Following Immunisation*) during task processing notifies the Centre for Adverse Reactions Monitoring (CARM). Once the data sent by the provider has been analysed, the DHB administrator is informed of the outcome. He or she will then contact the original provider and request that they update the individual's record with the outcome details.

Tasks with an AEFI-related outcome are identified by the presence of the ⚠ AEFI symbol on the individual's Full Task List. It will be associated with one of the three outcome codes:

- **AEFIOT** - other AEFI or concern
- **AEFISA** - serious and/or Severe AEFI - other - indicating contraindication
- **AEFISO** - serious and/or Severe AEFI indicating caution
- **AEFISX** - serious and/or Severe AEFI anaphylaxis indicating contraindication

Recording AEFI

An Adverse Event Following Immunisation (AEFI) would not typically be recorded at the time of immunisation. When an AEFI has been confirmed by CARM to the DHB administrator, he or she will then need to locate the affected individual's record and, from their Full Task List, edit the completed task to include an AEFI.

When this action is taken, an **AEFI Date** field is displayed and must be completed.

When this updated task is saved, the **Adverse Reaction** checkbox on the Individual Details screen will be checked and displayed in red.
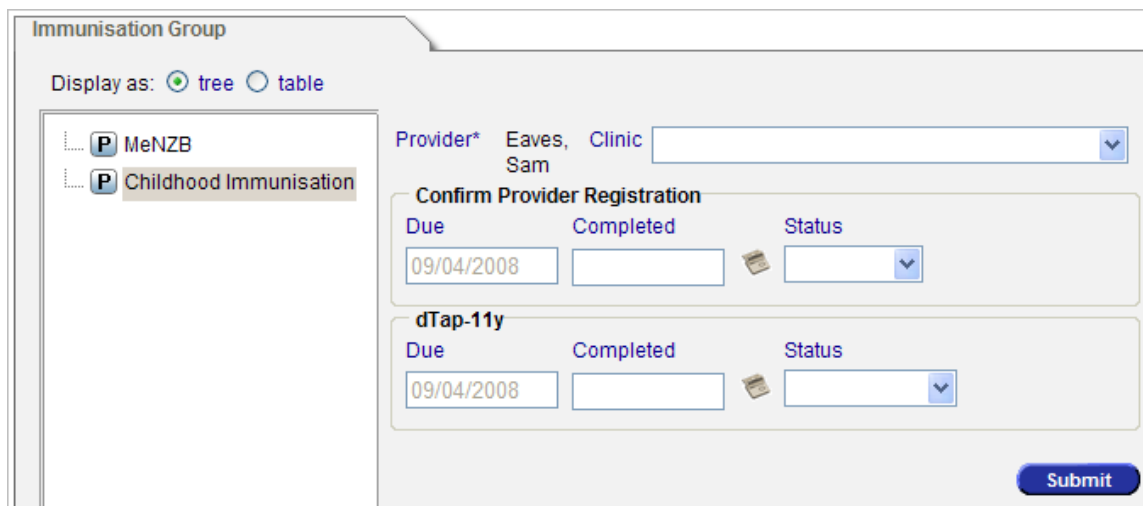
Current Task List

An individual's **Current Task List** only lists the due and overdue tasks in the programmes in which he or she is currently `Active`.

Open an individual's Current Task List by clicking the **Current Task List** icon ![icon] either in the list of names returned by a search or in the Context Bar once an individual's record has been selected. The Current Task List can be displayed in either **Tree** or **Table** view:

Current Task List - Tree View

In **Tree View**, the individual's enrolled and `Active` programmes are listed on the left of the screen, with the task list on the right. A user wishing to view the due or overdue tasks associated with a particular programme must click its name in the tree.

Current Task List Screen - Tree View

Current Task List - Table View

In **Table View**, due and overdue tasks associated with an individual's enrolled and `Active` programmes are listed on screen.

Current Task List - Table View

In either view, the individual's nominated provider is displayed at the top of the screen. A **Search** icon is available alongside the provider's name to allow an alternative provider to be located - when, e.g. the task is being processed by an administrator on behalf of a provider whose PMS is temporarily unavailable.

Data Enterers processing a task who need to perform a Provider search will only see a list of providers with whom they have been associated.

Processing a Task From the Current Task List

Processing a task from the **Current Task List** in either *Tree* or *Table View* is the same as from an individual's Full Task List .

Activity Summary

Activity Summary

An individual's **Activity Summary** lists all their processed tasks, including immunisations (whether given or declined), generated letters and **Outreach Services** outcomes.

An individual's Activity Summary is opened by clicking the **Activity Summary** icon , located in two places:

1. The **Search Results** screen
2. The **Context Menu** once an individual's record has been selected
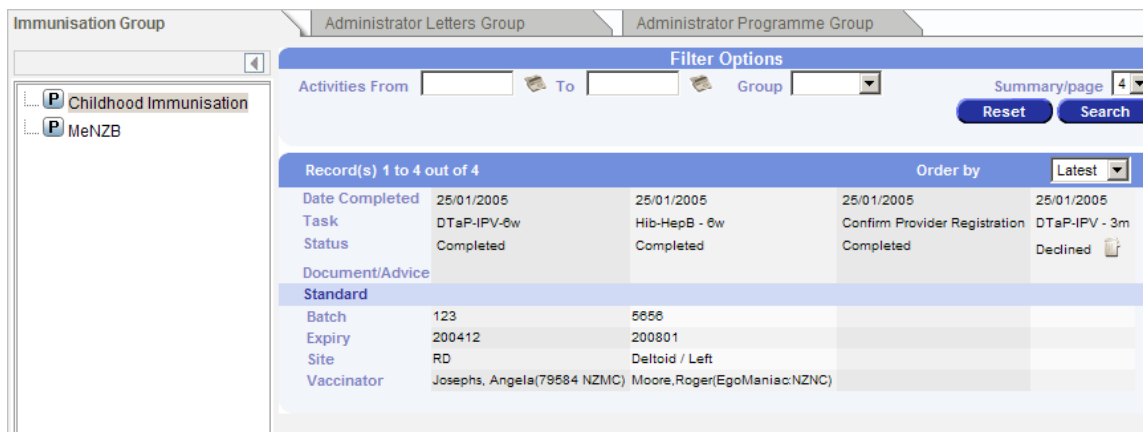
Activity Summary Tabs

The **Activity Summary** screen includes three tabs, each of which is illustrated in the following screen-shots:

1. **<Programme> Group** - lists the processed tasks in the selected programme in which the individual is enrolled
2. **Administrator Letters Group** - lists the letters generated as part of the individual's involvement in his or her programmes
3. **Administrator Programme Group** - summarises the individual's involvement with Outreach Services

Activity Summary - <Programme> Group Tab

All details captured at the time the task was processed are included in the summary. When additional notes are associated with a task, a **Document** icon will be present in the column in which the information is displayed; click this icon to view the document's contents.

Activity Summary - Immunisation Group Tab

Activity Summary - Administrator Letters Tab

The contents of any generated documents can be viewed by clicking the **Document** icon included in the summary.

Activity Summary - Administrator Letters Group Tab

Activity Summary - Administrator Programme Group Tab

The list of Outreach referrals can be filtered to show only the current one; click the **Display current referrals only** checkbox in the top, left corner to achieve this.

Comments entered at the time each Outreach task was processed can be seen on screen, and any documents generated as part of the individual's involvement with the programme can be viewed (and printed) by clicking the **Document** icon .
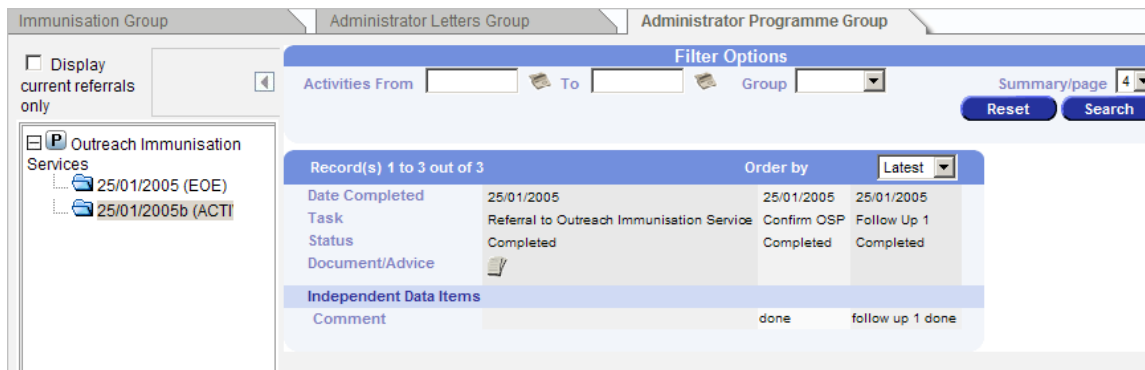
Activity Summary - Administrator Programme Group Tab

Filter Options

Filter options in all **Activity Summary** tabs enable you to determine which activities are included in the display.

Field	Description
Activities From	The date of the oldest summary that you want to view in dd/mm/yyyy format. You can either type the date directly into the field, or use the **Calendar** icon
To	The date of the most recent summary that you want to view in dd/mm/yyyy format. You can either type the date directly into the field, or use the **Calendar** icon
Group	This filter is not used by the NIR system
Summary/page	Allows the user to select the number of activities to be included in the summary. The default is 4 but the drop-down list allows up to 6 to be displayed at once. Once a number has been selected, click the **Search** button to refresh the screen
Order By	Allows the user to select whether the activities are displayed in ascending or descending date order

Activity Summary Filter Options

Click the **Reset** button to clear all filter settings.

> ✅ The **Search** button must be clicked to refresh the screen whenever new filter criteria are applied.

Individual Merge

Under normal circumstances, all individuals coming into contact with NIR will have a unique NHI (National Health Index) number. Under some circumstances, it can happen that two or more medical records, each with a unique NHI, are associated with a single individual. When this is found, the records are typically merged.

Only the NIR National administrator can merge records for an individual, regardless of the DHB with which he or she is associated. DHB administrators can only merge records for individuals associated with their own DHB.

When records to be merged are identified, the following criteria must be met before the merge can proceed:
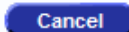
1. Individuals must have the same date of birth
2. Individuals must have the same gender
3. Programme enrolment and registration status must be identical for the two records

Merging Two or More Records

The **Patient Merge** screen is opened by clicking the **Patient Merge** icon   , located in two places:

1. The **Search Results** screen
2. The **Context Menu** once an individual's record has been selected

When a merge is performed, the youngest record(s) are typically merged into the oldest. The age of a record can be deduced by its NHI number; the higher up the alphabet the number is, the older it is likely to be. E.g. ABC1122 is older than ABD1122 and DEA1093 is older than DEA1094. The oldest record is known as the *primary* record in the merge.

		Identifier	Individual Name	Date Merged	Username
❌		BCG4188	JANCE HALEY	13/05/2008	natadmin
		AMR9208	Tyneka PINCOCK	13/05/2008	natadmin
➕					Cancel

Individual Merge Screen

The above example shows AMR9208 - *Tyneka PINCOCK* - has been merged into BCG4188 - *Janice Haley* - the primary record. A search from now on using either NHI number will return the same result: BCG4188.

Merge Fields

Field	Description
Identifier	The NHI number(s) of the records merged into the primary
Individual Name	Given and Family Name of the individual associated with the merged record
Date Merged	The date the record was merged to the primary record
Username	The username of the administrator who merged the records

Viewing Merged Information

When two or more records are merged, the individual names in the merged (secondary) records are stored as aliases and can be viewed by selecting the individual's **Individual Details** screen and clicking the **History** button. Other details, such as ethnicity and contact details and addresses, are also stored and can be viewed on the **History** screen.

Full History

INDIVIDUAL - AMR9208, born on: 09/03/1993

General Individual Details
- Tyneka Glen PINCOCK (9/03/1993) (Male)
- JANCE HALEY (3/02/1983) (Male)

Database Status

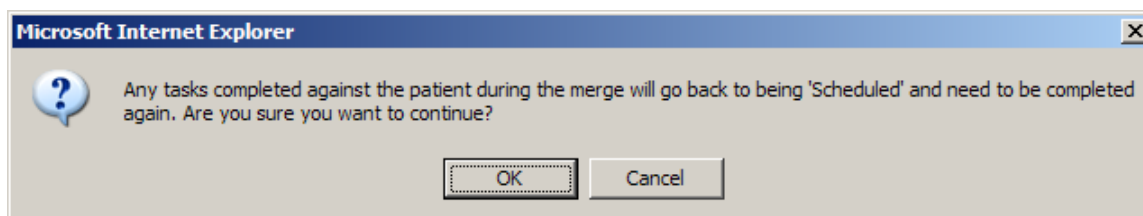| Status	Date Effective	Reason
ACTIVE	17/09/2004	

Ethnicities
- NZ European / Pakeha

Individual History following a Merge

Reversing a Merge

When a merge was carried out in error, the merge may be reversed by clicking the **Delete** icon in the leftmost column of the merged record. This action restores the record to its original components, which can be separately searched for and displayed.

The following warning is always displayed when reversing a merge; it warns that task processing details completed after the merge will be lost and that all such details will need to be re-entered manually. To assist with this, it is recommended that the individual's full task list is printed before the merge reversal takes place.

Microsoft Internet Explorer

Any tasks completed against the patient during the merge will go back to being 'Scheduled' and need to be completed again. Are you sure you want to continue?

OK   Cancel

Reversing a Merge

If two or more records have been merged into the primary, merge reversal has to be done systematically, with the last record to be merged being the first one 'unmerged'.

Individual Notes

Specific information relating to an individual's involvement with NIR can be recorded by attaching one or more notes to their record. The **Note Details** screen is opened by clicking the **Note Details** icon , located in two places:

1. The **Search Results** screen
2. The **Context Menu** once an individual's record has been selected

Individual Notes Screen

An individual's notes are accessible to DHB administrators, but only if the individual is associated with their DHB. National administrators can view all notes, regardless of the DHB with which the individual is associated.

Notes Fields

The Individual Notes screen is divided into eight sections:

1. **Follow Up Notes** - relating to the individual's association with Outreach Services
2. **Individual Notes** - additional information relating to the individual; e.g. additional contact details
3. **Kidslink Notes** - information relating to the individual's involvement in the Kidslink programme (Counties and Auckland DHB only)
4. **Merge Notes** - information relating to merge requests and completions
5. **Parent/Guardian Notes** - additional contact and/or caregiver information
6. **Provider Notes** - changes or updates regarding the individual's providers
7. **Programme Notes** - notes relating to programme registration(s) changes
8. **Transfer Notes** - changes to DHB alignments

Each section is divided into four columns:

Column	Description
Note	Note subject selected from the drop-down list
Note Text	Text field for note entry. Once the note has been added by clicking the **Add** icon, it is loaded as text above the text entry box
Date Recorded	The date the note was entered into NIR. This is system generated with today's date
Recorded By	The user id of the administrator entering the note

Note Details

Each note has a **Delete** icon to the left of its note subject. Clicking this icon will remove the note from the database.

Click the **Print** button at the bottom of the page to print all note entries separated by note headers. Printed copies do not include empty note sections.

d. National NIR Searches

Status Query Search

Status Query Search is used to locate an individual's immunisation record and to view a summary of their tasks - whether completed or declined, due or overdue and regardless of which DHB they are associated with. Due and overdue tasks can be processed from the Status Query Results screen.

To access the Status Query Search, click the **Status Query Search** icon [icon] in the **Searches** menu.
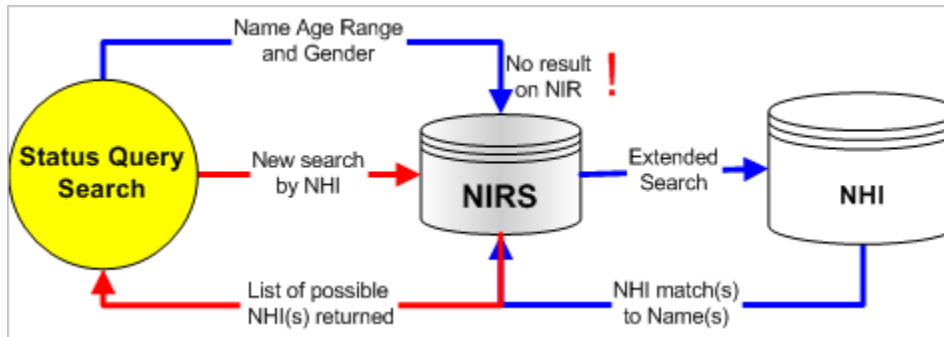

A **Status Query Search** will return any individual matching the search criteria, regardless of the logged in user's access level. Either the individual's NHI number or his/her name, age range and gender is required before a status query can be performed.

Criteria	Description
NHI	The individual's full NHI number. If an NHI is specified, all other information will be ignored. The system checks the validity of all NHI numbers before carrying out a search; if the number is not valid a warning will be displayed and the search will not be performed. NHI numbers are not case-sensitive
Name	The individual's first and last name must be specified using the format 'firstname familyname' or 'familyname, firstname'. This information can be partial; e.g. searching for 'Harr' will return individuals named 'Harry' and 'Harrison'. Name information is not case-sensitive and must be entered in conjunction with **Age** and **Gender** data
Wildcard	If selected (which is the default), a wildcard can be used in a name; e.g. 'smart, %well' will return all individuals with the familyname 'Smart' and whose first name ends with the string 'well'. At least two characters must be specified, including the wildcard, when entering familyname or firstname search criteria
Soundex	If selected, full name information must be provided. However, the system will return results which 'sound like' the entered criteria; e.g. a search using *Philips* will return both *Philips* and *Phillips*. Wildcard searches only operate for the NHI database, not NIR
Age	The upper and lower limits (in years) within which the individual's age lies. Please make sure the To field is greater than 10.
Gender	The individual's gender or sex

Extended NHI Status Query Searches

The Status Query Search initially looks for records on the NIR database. When this is unsuccessful, an extended search is made of the NHI at the Ministry of Health; this search may take longer but is very likely to return a result. If a search is still unsuccessful, repeat the search with different criteria.

The diagram shown in *Extended NHI Search* illustrates a Status Query search extending to the NHI.

Extended NHI Search

Status Query Report

A Status Query search returns a report showing the individual's demographics, programme status and a history of their contacts with the NIR. An example is shown in *DHB Status Query Report*:

This information is designed to assist in making decisions with regard to planned vaccinations for the individual.

Status Query Report for: Virinder BRUNES

Individual status as at 13/05/2008 15:56

Note: Immunisation history may be incomplete due to individual being (a) enrolled on the MeNZB programme but not within the NIR birth cohort, or (b) within the NIR birth cohort but with earlier tasks not recorded on the NIR

NHI:	FLX6981
Database Status:	ACTIVE
Status Created:	09/10/2008
Notes Available:	Yes

Last Name: BRUNES		First Name: Virinder	
Date of Birth 14/01/2006		Age:	2 years, 3 months
Gender:	M	Ethnicity:	NZ European / Pakeha
GP:	Sam Eaves		
GP Clinic:	Otumoetai Doctors Ltd		

Childhood Immunisation Programme Status: **ACTIVE** Status Created: **08/06/2006**

Task	Status	Due	Complet	Provider	Clinic	Batch	Expiry	Diluent Batch	Diluent Expiry	Site
AG-DTaP-IPV - 3m	Completed	14/4/2006	10/4/2006	Sam Eaves	Otumoetai Doctors Ltd	AC20B045CA	Mar-08			LVL

MeNZB Programme Status: **ACTIVE** Status Created: **06/05/2008**

Task	Status	Due	Complet	Provider	Clinic	Batch	Expiry	Diluent Batch	Diluent Expiry	Site
MeNZB - 1	Completed	6/5/2008	6/5/2008	Sam Eaves	Christchurch Family Clinic	121212	May-10			LD

Print   Open Record

When viewed by a National or DHB administrator, the following buttons are available:

- **Print** - opens the standard *Windows®* dialog, from which a printer may be chosen and the number of copies set before printing
- **Open Record** - opens the **Individual Details** screen, from which the individual's demographic and other details may be accessed. Icons in the individual's context menu (at the top, right of the screen) provide access to their Medical Details, Full and Current Task Lists and other NIR screens

Notes Available

A Notes Available: *Yes* or *No* message is displayed in the top, right corner of an individual's Status Report. Its purpose is to alert the viewer when one or more notes have been associated with the individual's record.

No NIR Record Found

A warning is displayed in the Status Query report for individuals who do not exist on the NIR and whose information is pulled from the NHI, with an example shown in *Record Not Found on NIR*:

Record Not Found on NIR

If an individual has details on the NHI, but not on NIR, the status query will display those details but no immunisation information. The purpose of the message shown in *Record Not found on NIR* is to ensure that administrators know the source of the information they are viewing; from NIR or NHI alone.

Reason for Status Change

If an individual's status has changed in one or more of the programmes he or she has enrolled in, the reason provided at the time the change was made will be displayed at the bottom of the Status Query Report, as shown in *Status Query Showing Reason for Status Change*.

Status Query Showing Reason for Status Change

Open Record

Clicking the **Open Record** button opens the **Individual Details** screen shown in *Open Record Screen* where any changes to the individual's contact or other details can be entered. Refer to Individual Details for details on the information contained in this screen.

Open Record Screen

Once any changes have been saved, the remaining NIR screens become available from the context menu at the top of the screen.

Providers Search

The **Providers Search** screen is used by the NIR National administrator to maintain the list of providers (regardless of DHB) associated with the National Immunisation Register.

To access Providers Search, click the **Provider Search** icon in the **Searches** menu.

Providers Search Criteria

Providers Search Criteria

The Providers Search criteria are described in the following table.

Criteria	Description
Provider Identifier	A value associated with a provider which, in conjunction with the ID Type, uniquely identifies him or her
ID Type	The name of the organisation responsible for issuing and maintaining the Provider ID values. Typically will be *NZMC* (New Zealand Medical Council) or *NZNC* (New Zealand Nursing Council)
Provider Name	The provider's first and last name must be specified using the format 'firstname familyname' or 'familyname, firstname'. This information can be partial; e.g. searching for 'Harr' will return providers named 'Harry' and 'Harrison'. Name information is not case-sensitive. A wildcard can be used in a name; e.g. 'smart, %well' will return all providers with the familyname 'Smart' and whose first name ends with the string 'well'
HMS Mailbox	The electronic mailbox through which the provider electronically sends or receives NIR related messages
Clinic	The name of the clinic associated with the provider. Each provider may, however, be associated with many clinics
Provider Application	The name of the application used by the provider in his or her clinic to view and enter individual information

Provider Role	Identifies the typical relationship between the provider and the individuals he or she is associated with
Status	Identifies the provider's Status in NIR. *Inactive* providers are not able to exchange messages with NIR

Provider Search Criteria

Providers Search Results

Providers Search Results are displayed in columns matching the search criteria; refer to the previous table for their description.

Search Results

Clinic	Name	Provider ID	ID Type	HMS Mailbox	Provider Application	Alias Name	Status
Four Kauri Family Medical Centre	Stewart, Sarah	13561	NZMC	fourkmc	Next Generation		Active
SBVS Hawkes Bay	Stewart, Susan	136928	NZNC	hbdhbrsd	SBVS		Active
Eggs4Breakfast	Stewart, Susan	136928	NZNC	ConnerAir	Next Gen Clinical Notes		Active
SBVS Otago	Stewart, Sarah Margaret	137783	NZNC	otagosbv	SBVS		Active
LMC Midwife Clinic - Otago	Stewart, Sarah Margaret	137783	NZNC		Manual Provider		Active
Queen Mary Maternity	Stewart, Sarah Margaret	137783	NZNC		Other		Active

Printer friendly version Download CSV results

Providers Search Results

One additional column is returned:

Column	Description
Alias Name	An alternative name by which the provider may be known

Providers Search Results - Additional Column

Click any entry in the list of returned providers to select that provider and view his or her details. Click any column title in the results panel to sort by that column; click a second time to reverse the sort. If more than ten results are returned, navigation buttons will be available to move forwards or backwards through the list.

Printing and Saving the Results

The following links are available to print or save the list of results:

- **Printer friendly version** - click to import the results into Adobe® Reader®, from where they may be printed or saved
- **Download CSV results** - click to save the results as a CSV (Comma Separated Value) file. The results can then be imported into a spreadsheet application such as *Microsoft® Excel*

73

Provider Details

A provider's status, associated clinics and programme details are shown in *Provider Details*:

Provider Details

All information on this screen can be edited by the national administrator. A DHB administrator can only edit this screen if the provider is associated with at least one clinic in his or her DHB, but cannot, under any circumstances, change the value of the provider's **Provider ID**.

Provider Roles

Changes to a provider's role will affect many other screens. E.g. if you are viewing the **Medical Details** screen for an individual enrolled on a Well Child Programme, only providers with the role 'WCP' are returned in a provider search. An existing role can be removed from the list by selecting **Delete Row** from its context menu. Add a new role by selecting from the drop-down list of options and clicking the **Add** icon.

All GPs are by default Immunisation Providers but Immunisation Providers don't have to be GPs. As a result, where a provider has the role 'GP', the GP role can be deleted from the Provider Details screen but the Immunisation Provider role cannot.

Other programmes and their associated roles are:

- Well Child Programme - role must be **Well Child Provider**
- Outreach Immunisation Services - role must be **Outreach Immunisation Services**

Changing a Provider's Status

Changing a provider's status to *Inactive* will prevent him or her exchanging messages with NIR. All information on an *Inactive* provider's details screen is read-only. 'Inactivating' a provider can only be carried out if he or she is not associated with any individuals in any programme. If this is the case, the following warning is displayed:
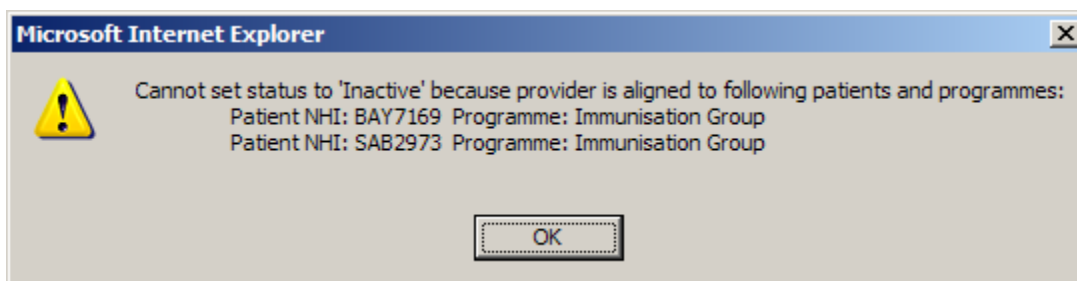
Changing a Provider's Status - Warning

The administrator will need to open the record of each of the listed individuals and remove the association between them and the provider before the provider's status change can be actioned.

A provider's status change cannot be set for a future date. Historical information for an inactive provider is retained, allowing administrators to complete tasks for them provided the date completed is prior to the effective date of the inactivation. This allows clinics to send in their task update messages after the task was actually completed.

Deleting or Editing a Provider's Alias

An alias is an alternative name by which the provider may be known. Existing aliases are deleted or edited by right clicking and, from the context menu, choosing **Delete Row** or **Edit Row** as required. Add an alias by providing the necessary details (fields marked with an asterisk are required) and clicking the **Add** icon.

Editing the Provider's Clinic List

A provider must be associated with one or more clinics, each of which may be in different DHBs. Existing clinics in the list can be removed by selecting **Delete Row** from its context menu, while new clinics may be added by carrying out a Clinic Search.

Merging Provider Records

When duplicate provider records exist, a user can request that these be merged by contacting the NIR National administrator. This should only be done when the provider records are duplicates, not for transferring information between providers.

Changes Following a Provider Merge

1. **Clinics** - all of the old provider's clinics will be associated with the new provider, provided he or she isn't already associated with them. This ensures the new provider will have the appropriate clinic associations when the PatientProgrammeProvider records are merged
2. **Roles** - all of the old provider's roles will go to the new provider. This ensures the new provider is

capable of completing all tasks which will be associated with him when the records are merged

3. **Tasks** - all tasks associated with the old provider, completed or not, will be associated with the new provider. In addition, if the old provider was ever listed as a vaccinator for any completed task, this will be changed to the new provider

4. **Provider Notification Updates** - if, for any given programme, the old provider is set to have notification updates, those will be transferred to the new provider. If the new provider has a corresponding update rule for the same programme, the two will be merged such that if either of the providers has selected 'Yes' for a notification, the notification will be set to 'Yes'

5. **Patient Programme Provider Updates** -
   - PatientProgrammeProvider (PPP) records will be updated to point to the new provider. They will remain the same if transferred to a new provider. Task Update or Overdue Notification options for that particular patient set in the Medical Details screen under the old provider will be transferred to the new provider
   - if the new provider shares a record with the same patient and programme as the old provider, the two will be merged the same way as mentioned in 4
   - if any of the new provider's associated patients do not have a similar PPP record with the old provider, a notification record will be created based on the provider's programme-specific notification requirements. If the new provider has additional programmes associated to it as a result of the merge then existing associated patients of the new provider will have their PPP record updated with the programme and notification settings of the post-merge new provider
   - If there is a matching PPP record for the new provider, meaning the new provider already appears as being associated with the same patient, programme and clinic, then the two will be merged. When this happens, if the old provider was nominated, the new provider will become the nominated provider. If there is no matching PPP record, the old Nominated Provider will remain the Nominated Provider for that patient

6. **Provider Information** - the provider records themselves are merged such that the oldest record status date is preserved. The old provider is then deleted

Programme Task Notification

The **Programme Task Notification** panel lists the programmes with which the provider is associated, and for which the provider could be chosen on an individual's **Medical Details** screen. An existing programme can be removed from this list by selecting **Delete Row** from its context menu.

- If **Task Notification** is selected - the provider will be electronically notified whenever a task for an individual in the associated programme is updated by another user. This *will* be selected by default, unless the provider does not wish to know the up-to-date status of their individuals
- If **Overdue Notification** is selected - the provider will be electronically notified whenever a task becomes overdue for one of his (or her) individuals in the associated programme. This *will not* be selected by default, as most providers rely on their PMS (Patient Management Systems) to alert them of overdue tasks

Adding a Provider

To create a provider, open **Provider Search** from the **Searches** menu.

Adding a Provider

Only the circled fields need information; once these have been provided, click the **Add** button.

Field	Description
Provider Identifier	The provider's **Medical Council** or **Nursing Council** number
ID Type	Select NZMC or NZNC

Adding a Provider - Required Fields

> ⚠ Nursing Council numbers are normally six digits but for a practice nurse it may include a letter or only five digits. Doctor and nurse numbers must be entered in NIR as specified in their PMS rather than what is on their practicing certificate. If their identifier is 1234 but appears as 01234 on their PMS, enter 01234 into the NIR. DO NOT CHANGE THE NUMBER IN THEIR PMS.
>
> When you send the AUA to your clinics for the initial set up, enter *as per what is on PMS* next to the area where they place their Registration number so that the number they supply is correct from the start.

Entering Provider Details

On the **Provider Details** screen for the new provider, his or her **Role** must be selected. The options are shown in *Role Selection for a New Provider*:

Role Selection for a New Provider

Field	Description
Roles	The options are: • **GP** - select GP > Immunisation Provider (happens automatically) > `Vaccinator` • **Vaccinator** - select `Vaccinator`. If you have the scenario where one of your clinics is a private practice and also provides an Outreach service, also assign the role of `Outreach Immunisation Services` to that provider. You should have set up that clinic ONCE as a private practice • **SBVS Team Leaders** - `Immunisation Providers` and `Vaccinators` • **SBVS Vaccinators** - `Immunisation Providers` and `Vaccinators` • **LMC** - `Lead Maternity Caregiver`. Ask new LMCs if they ever give vaccinations e.g. HBIG and HepB-Paed at birth. If they do, also specify `Immunisation Provider` and `Vaccinator`
Status	`Active` for new providers
Effective Date	The date the record is created or changed
Name Title	`nurse` or `doctor`
Name Family Name	The provider's Surname

Name First Name	Use name rather than initial e.g. Dianna rather than D
Alias	The provider's alternative surname; e.g. a maiden name. A Provider Name Search will return both variances. (Optional)
Clinic	Click the **Search** icon to locate and select the clinic with which the provider is associated. This can be repeated if he or she is associated with multiple clinics
Programme Notification	Select `Childhood Immunisation`, `HPV`, `MeNZB`, `Pneumococcal`, `Hep B` and `BCG`. CMDB users only can also select `Wellchild`. Only load `Outreach Immunisation Services` for Outreach clinics or providers. It is not necessary to select `Letters`
Task Notification	By default, all specified programmes with have the **Task Notification** checkbox selected. The GP may not want to receive messages but unless this option is selected, practise nurses will not receive task update messages. Because the GP is the individual's responsible provider, messages will be received into his or her mailbox and not into the nurse's one
Overdue Notification	PMS's typically include overdue worklist/reports, allowing GPs to manage their own overdues. NIR has the facility to send overdue messages to the Provider's inbox only if they require it

Provider Identification Details

Overdue Messages/Reminders

Individuals are linked to the provider and the clinics he or she is associated with. NIR doesn't have a "true" association between the individual and a vaccinator. Vaccinators are recorded for an individual's specific immunisation events. Messages are sent to the Nominated Provider, not the vaccinator.

✅ The new provider's **Provider Identifier** and **ID Type** cannot be changed once the record has been saved.

When visiting your clinics, remind staff that when entering immunisation details in their PMS, to ensure that the fields **Provider** and **Vaccinator** contain correct information.

Provider Field

The **Provider** field identifies the medical professional who is clinically responsible for the individual - typically the GP. Some PMS systems default this field with the logged-on user which, when this user is a GP, presents no problem. When the logged-on user is the vaccinator, their ID appears in this field and will result in an **Invalid Provider** alert.

Vaccinators therefore need to ensure that if they are logged in, the Provider details must be entered into this field.

Identifying the Providers Associated with a Clinic

To list the Providers associated with each clinic

1. Open **Provider Search** from the **Searches** menu
2. Run a search with a filter specifying each clinic
3. Select **Printer friendly version** to import the results into Adobe® Reader. Alternatively, copy and paste the results into *Microsoft® Excel*
4. Repeat for each clinic

Clinic Search

The **Clinic Search** screen is used by the NIR National administrator to maintain the list of clinics associated with providers involved with the National Immunisation Register. A National administrator can search for any clinic and edit its details, regardless of the DHB within which it is located.

To access Clinic Search, click the **Clinic Search** icon in the **Searches** menu.

Clinic Search Criteria

Criteria	Description
Clinic Identifier	The clinic's Health Facility code (HFC)
Clinic Name	The clinic's name can be partial; e.g. searching for 'well' will return clinics named 'WellCare' and 'WellHealth'. Name information is not case-sensitive. A wildcard can be used in a name; e.g. %family%' will return all clinics which have the word 'Family' anywhere in its name
Mailbox Type	Identifies how the clinic will be sending and receiving messages
Mailbox	Either the clinic's fax number (with area code) or their HealthLink EDI account
Provider Application	The name of the application used by the provider in his or her clinic to view and enter individual information. For manual clinics, select `Manual Provider`
Clinic Type	Identifies the primary role of the clinic - typically `Private Practice`. For **SBVS**, select `School`
DHB	Identifies the District Health Board the clinic is physically located in. This field is blank by default for national administrator
Status	Identifies the clinic's status in NIR. If the clinic is not *Active*, it will not be able to exchange messages with NIR and its details will be read-only if selected

Clinic Search Criteria

Clinic Search Results

Clinic Search Results are returned in a panel below the Search Fields in a number of columns. Click any column title to sort by that column; click a second time to reverse the sort.

Clinic Identifier	Clinic Name	Mailbox Type	Mailbox	Provider Application	Clinic Type	DHB	
B707	Papakura Family Health Centre	HMS	papafamh	Medtech32	Private Practice	Counties Manukau	
B709	Papakura Family Medicine Clinic Ltd	HMS	papakfmc	Profile for Windows	Private Practice	Counties Manukau	
D383	Papakura Family Medical Practice	HMS	drfongpa	Next Generation	Private Practice	Counties Manukau	
D069	Papakura Marae Clinic	HMS	papakurm	Medtech32	Private Practice	Counties Manukau	
D160	Papakura Health Centre	HMS	papakuhc	Medtech32	Private Practice	Counties Manukau	

Printer friendly version Download CSV results

Clinic Search Results

The columns in the **Search Results** panel match the search criteria; see the previous table for an explanation of their contents.

Printing and Saving the Results

The following links are available to print or save the results

- **Printer friendly version** - import the results into Adobe® Reader®, from where they may be printed or saved
- **Download CSV results** - save the results as a CSV (Comma Separated Value) file. The results can then be imported into a spreadsheet application such as *Microsoft® Excel*

Clinic Details

Details relating to a specific clinic can be displayed by clicking anywhere on its row in the **Search Results** panel.

Clinic Details

Editing Clinic Details

Information on this screen can be edited by both National and DHB administrators, although the latter can only do so if the clinic is physically in his or her DHB. Neither administrator will be able to change the Clinic ID.

A clinic's status cannot be changed to *Inactive* if it has one or more associated providers. This relationship can be removed from the **Provider Details** screen. The DHB the clinic is associated with also cannot be changed.

Clinic Type

Edit a clinic's **Address** and **Contact** details from the context menu. After adding new details, remember to click the **Add** icon.

- When a clinic is a private practice and also provides Outreach Services, set up the clinic ONCE as a private practice. When creating the providers for that particular clinic, ensure they are assigned the role of `Outreach Immunisation Services`
- When the clinic type is *School*, the school's **Decile Rating** and **Roll History** can be specified. Otherwise these fields do not apply
- When adding a hospital, ensure the **Name** and **Mailbox** fields are set to the name the clinic will supply in its extract files (you may need to contact the facility to confirm this information). Set the **Clinic Type** to `hospital` and the **Mailbox Type** to `HMS` prior to clicking the **OK** button to create the record

Providers who perform HepB-Paed or HepBIG immunisations at a hospital must be aligned to that hospital in the system via the Provider Details screen.

Adding a Clinic

To create a clinic, open **Clinics Search** from the **Searches** menu. Click the **Add** button; a blank **Clinic Details** screen is displayed:

Adding a New Clinic

Field	Description
Name	The clinic name
Clinic ID	The Health Facility Code (HFC). Is 4 characters long, starting with A,B,C,D,E or a zero. (Not the letter 'o')
PHO	A grouping of clinics for funding purposes. Each clinic may be associated with only one PHO. Used for reports to aggregate correctly. (Optional; specify if known)
Mailbox Type	Options: • `<blank>` - for manual providers • `FAX` - for fax providers • `HMS` - for electronic sites • `HMSoldmailbox` - do not use
Mailbox	Options: • `HMS` - for electronic providers. The HealthLink EDI account is populated here (8 characters maximum and case sensitive). If this does not match the mailbox name in a message's header, an error will occur and the message will not be loaded into the NIR • `FAX` - the clinic's fax number, including the area code. Format: xx xxxxxxx • `<blank>` - for manual providers
DHB	Will default to your DHB
Provider Application	The application used by providers to record individual record details. If your provider is a **Fax** or a **Manual** provider, select `Manual Provider`
Status	Select `Active`
Clinic Type	Options: • `Private Practice` - most practices • `School` - for SBVS • `Hospital` - for hospitals
Independent Providers Association	A private clinic union or co-operative formed to facilitate purchasing or central government lobbying. Not required
Contacts	Populate with phone and fax details. Remember to include the area code: Format: xx xxxxxxx. If the provider is a 'FAX' provider, you must add the FAX number here under `Work Fax`, otherwise they will not be able to receive messages from NIR

Adding a Hospital

When adding a hospital, ensure the name and mailbox fields are set to the same values as supplied by the clinic in its extract files. You may need to contact the facility to confirm this information.

- Select Clinic Type: `hospital`
- Select Mailbox Type: `HMS`
- Create the record as usual

Providers who perform HepB-Paed or HepBIG immunisations at a hospital must be aligned to that hospital in the system via the Provider Details screen.

> ⚠ If you have the scenario where one of your clinics is a private practice and also provides Outreach Services, set up the clinic once as a private practice. When creating the providers for that clinic, ensure you also assign the role of **Outreach Immunisation Services** to all providers who work at that clinic.

e. National NIR Administration Tools

The NIR **Administration Tools** are collectively used by a national administrator to identify and correct error messages received by NIR.

Errors and Criticals

Clicking **Errors and Criticals** under the **Admin Tools** menu displays a list of errors relating to messages containing errors of sufficient severity to prevent them from being loaded by NIR.

Definitions of the two categories are:

- **Error** - the message contains one or more errors which caused it to be held in the Rhapsody Error Queue and not loaded. The error can be corrected using Rhapsody Message Editor
- **Critical** - the message cannot be understood by the system, as key information is missing or incorrect. These messages have to be corrected using Rhapsody Message Editor. This facility is available only to the National administrator

National administrators are able to view all error messages, regardless of the DHB from which they originate. DHB administrators will only be able to see messages originating from their DHB. When the link is first clicked, a full search is automatically carried out and the results displayed. These results can be filtered by applying one or more filters from the screen shown in *Errors and Criticals Filter Criteria*:

Errors and Criticals Filter Criteria

A typical message list is shown in *Errors and Criticals Results*. If more than fifteen entries are returned, navigation arrows will be available at the bottom of the screen. Click any column title in the results list to sort by that column; click a second time to reverse the sort.

This feature can be used to group related messages or to place the oldest messages at the top of the list, where they can be dealt with first.

Date	NHI	Name	Description	Type	Programme Mailbox HFC
14/09/2005	QUB4318	Kelsey, Danni	HFC and Receiving facility combination is not valid.	CRITICAL	
14/09/2005	QRM4254	Walker, Floyd	HFC and Receiving facility combination is not valid.	CRITICAL	
14/09/2005	CNE6367	Paul, Peter	HFC and Receiving facility combination is not valid.	CRITICAL	
14/09/2005	QQP3912	Broad, William	HFC and Receiving facility combination is not valid.	CRITICAL	

Errors and Criticals Results

Select any message by clicking on its row; the application appropriate for its correction will then open.

A partial problem list is shown in *Errors and Criticals Results*; individual messages can be selected for correction by clicking its corresponding row. The application that opens when this is done depends on the nature of the problem:

- **Error** and **Critical** messages - Rhapsody Message Editor opens. The use of this tool is described below
- **Warning** and **Alert** messages - the individuals' **Individual Details** screen opens. Errors can normally be corrected on this screen or by switching to their **Medical Details** screen

Consistent Errors

When a messaging user of the system is consistently sending messages containing incorrect or invalid information, it probably indicates that their system is configured incorrectly. In such a case, the administrator should identify the sending clinic and inform them of the problem.

Contacting the National Administrator

If a DHB Administrator sees a message they are unsure of how to fix, he or she should screenshot the item and email it to `nirsupport@moh.govt.nz`.

Viewing Error Message Details

Selecting an error message from the **Errors and Criticals** list opens that message in the Rhapsody Message Editor.

Error Detail in Rhapsody Message Editor

Action: The selected error related to missing caregiver information in an individual's record. The missing information can be provided by the administrator or the message can be deleted and the individual's provider contacted and asked to supply the necessary details.

Invalid NHI Number Error

If the entered NHI Number entered is incorrect, the correct number needs to be sourced from the NZHIS and re-entered.

Correcting an Invalid NHI Number Error

Action: The individual's correct NHI number needs to be entered and the provider asked to check/correct the number in their PMS.

Performing Vaccinator Error

This error occurs when a vaccinator has not been set up on NIR.

Correcting a Performing Vaccinator Error

Action: Contact the Provider who will provide the vaccinator's details (using the AUA form). Once this form has been received, create an account for the vaccinator in NIR.

> ⚠ Once you have set up the new vaccinator, the existing error messages need to be fixed so that those details will flow through.
>
> To achieve this, type the following in the above field: 034561:NZMC where 034561 is the Provider ID and NZBC is the ID Type. The semi-colon must be included.

Invalid Clinic Details

This error relates to the provider's clinic set-up.

Message Body (ASCII)

```
MSG_HDR|FF_ORU|POND|CARDPLUN|99999|NZMC|CDM|welchild|||20050215203200
|NPLAINTEXT|197405|P||2.3||Old
PAT_IDF|RRD7881|REDDY|ANISHA|||20040426|M|09 8346768|||43|||||||||04
PAT_ADDR|154 Princes St||Not
Specified|Pukekohe||C||2677875|6442893|MB
0820700|20080618155813|T40|2
CGR_IDF||KLAASSEN|NATALIE|||19780620||01|09 8346768
CGR_ADDR|36 VODANOVICH ROAD||EDMONTON|WAITAKERE||C|||||20080618155813
ORD_COM|UP|||||20041224|20050624|20050207000100000|99999|Plunket|||NZ
MC|||||||||D723
OBS_REQ|1|64D||READ|20040207|F
```

Errors

Description	Action	
Invalid or no relationship between provider and clinic. Performing clinic:	Insert valid entry for: MSG_HDR/PerformingClinic	
Invalid or no relationship between provider and clinic.Sending Facility: CARDPLUN, Maibox type: SendingFacility	Insert valid entry for: MSG_HDR/Old	
Invalid or no relationship between provider and clinic.Sending Facility: CARDPLUN, Maibox type: SendingFacility	Insert valid entry for: MSG_HDR/MailboxType	
Invalid or no relationship between provider and clinic.Performing provider: 99999, Performing provider coding system: NZMC	Insert valid entry for: MSG_HDR/PerformingProvider	
Invalid or no relationship between provider and clinic.Performing provider: 99999, Performing provider coding system: NZMC	Insert valid entry for: MSG_HDR/PerformingProvCoding	

Message Processing

Re-Send Message To:	Common/Deliver corrected Business Logic errors to SWE/Get Name, DHB, NHI	Process Message
Delete Message		Delete Message

Correcting a Clinic Setup Error

Action: Enter the correct details and process the message. This removes the error and sends the individual's details to NIR.
You still need to contact the provider because their mailbox configuration needs to be changed so that the error will not reoccur. They will have to contact their PMS vendor if they do not know how to do this.

Invalid Ethnicity Code Errors

Errors of this type can arise when a PMS is using old codes.

Search Results					
20/04/2006	DKC3375	VISSER, MICHELLE	Patient has invalid ethnicity code: 2,Extra data found at end of composite: 0644,Extra data found at end of composite: 0644	ERROR MHSMART	Orion

Invalid Ethnicity Code

Action: Insert the correct ethnicity code into the message before resending it.

Code	Description
10	European not further defined
11	NZ European
12	Other European
21	NZ Maori
30	Pacific Island not further defined
31	Samoan
32	Cook Island Maori
33	Tongan
34	Niuean
35	Tokelauan
36	Fijian
37	Other Pacific Island
40	Asian not further defined
41	South East Asian
42	Chinese
43	Indian
44	Other Asian
51	Middle Eastern
52	Latin American/Hispanic

53	African
54	Other
99	Not Stated

Ethnicity Codes

Task Code:Indication Errors

Occurs when the value of the Task Code:Indication does not match the completed task.

Action: Once you have determined which task was supposed to have been sent, enter the appropriate task code followed by a colon ":" and the indication code. Then enter the coding system corresponding to the vaccine code.

*E.g. if the first dose of MeNZB was given, the task update message should contain `99002:1:5`, where `99002:1` is the task code and `5` is the indicator. The **Coding System** `NZVX` is added at the end.*

Code:Indication	Description	Coding System
99002:1:5	MeNZB Dose 1	NZVX
99002:2:5	MeNZB Dose 2	NZVX
99002:3:5	MeNZB Dose 3	NZVX
99002:4:5	MeNZB Dose 4	NZVX
99002:1:6	Booster/Extra MeNZB Dose 1	NZVX
99002:2:6	Booster/Extra MeNZB Dose 2	NZVX
99002:3:6	Booster/Extra MeNZB Dose 3	NZVX
99002:4:6	Booster/Extra MeNZB Dose 4	NZVX

Coding Systems

Mailbox Not Recognised

When a clinic's electronic mailbox is not recognised by NIR, messages cannot be accepted from or sent to that practice. Clicking the corresponding row opens the **Rhapsody Message Editor**, from where the error can be corrected.

Correcting an Invalid Mailbox Error

Two options are available for correcting this problem:

- If the Mailbox account is known, enter it onto the screen and click the **Process Message** button. Be sure to follow this up by contacting either the clinic itself, or the DHB administrator for the region within which the clinic is located, and ensure they enter the correct mailbox account into their PMS. Otherwise the error will reoccur every time a message is sent
- If the Mailbox account is not known (or cannot be found), click the **Delete Message** button. The clinic or responsible DHB administrator must then action the correction of the error and have the message resent

Outgoing Message Validation Failed

Clicking a message of this type opens Rhapsody, but only with the option to delete the message. Once this has been done, the originating clinic or responsible DHB administrator must be asked to check all details and resend the message.

Warnings and Alerts

Clicking **Warnings and Alerts** under the **Admin Tools** menu displays a list of warnings relating to messages from providers that, while they were able to be loaded into NIR, still contained one or more mistakes that should be corrected.

Definitions of the two categories are:

- **Warning** - the message contains one or more errors, but was still loaded. The error can be corrected by opening the **Individual Details** or **Medical Details** screens. Managed by NIR DHB administrators
- **Alert** - a system-generated message notifying administrators of tasks to be completed or changes made to an individual's status. Managed by NIR DHB administrators

National administrators are able to view all warnings and alerts, regardless of the DHB from which they originate. DHB administrators will only be able to see messages originating from their DHB. When the link is first clicked, a full search is automatically carried out and the results displayed. These results can be filtered by applying one or more filters from the screen shown in *Warnings and Alerts - Filter*:

Warnings and Alerts - Filter

Warnings and Alerts - Results

A typical message list is shown in *Warnings and Alerts List*. If more that fifteen entries are returned, navigation arrows will be available at the bottom of the screen to allow easy movement through the list. Click any column title in the results list to sort by that column; click a second time to reverse the sort. This feature can be used to group related messages.

Warnings and Alerts List

Typically, errors in this list are corrected by clicking the corresponding row which opens a relevant screen from which it may be corrected.

Removing an Error

Occasionally an error may be corrected but the error message persists on the above screen, even after the list has been refreshed. If this is the case, the message can be removed by clicking its corresponding **Delete** icon.

Address Details Incorrect Error

When address details are incorrect, a valid Geocode cannot be generated and a warning similar to that shown in Address Error is displayed:

Address Error

Clicking the text of the error opens the Individual Details screen, followed by the Edit Address panel, shown in Correcting an Address Error:

Correcting an Address Error

Typical sources of address errors include:

- spelling mistakes present, including an unrecognised abbreviation
- commas present in the address
- suburb and town details not in the correct order
- town is not correctly identified; e.g. Southern Auckland should be just Auckland

Click the **Save** button to display the screen shown in Geocode Address Correction, which offers four address correction options:
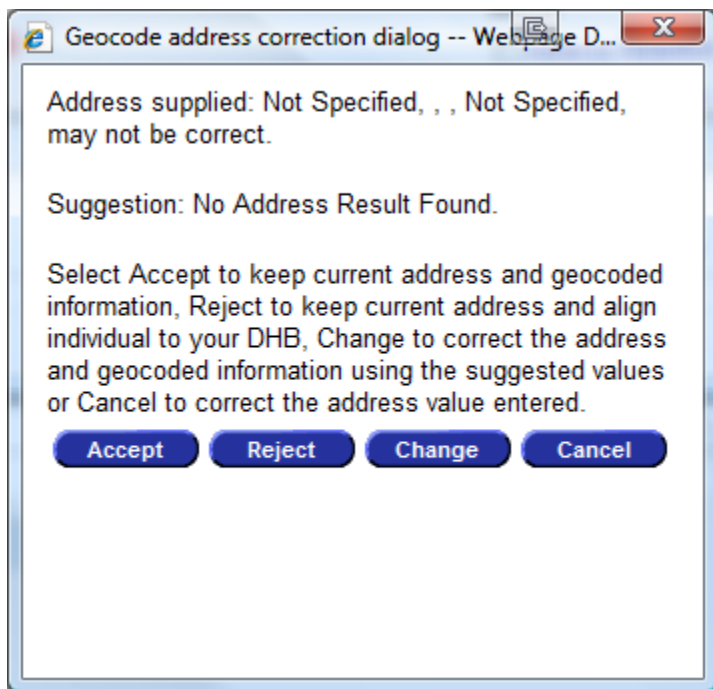
Geocode Address Correction

1. Accept - retains the address as entered. The address will be geo-coded using the suggestion on the **Geocode Address Correction** dialog. The individual's associated DHB will be changed to match the DHB in which the suggested address is located
2. Reject - retains the address as entered. The individual's associated DHB will be changed to match the current user's DHB
3. Change - replaces the entered address with the one suggested on the **Geocode Address Correction** dialog. The individual's associated DHB will be changed to match the DHB in which the suggested address is located
4. Cancel - closes the dialog so that the entered address can be manually edited

Verifying an Address

If you are trying to verify an address, use the website www.wises.co.nz to locate the address and check its spelling and other details.

Reports

The Warnings and Alerts list may include an alert of the type: **Maternity Download Report is ready to view**. In such a case, an administrator is able to click anywhere on the row corresponding to this message; this action opens the Reports screen from which the report can be generated and printed.

Letters Task List

The **Letters Task List** is used to identify individuals on the NIR who have one or more outstanding letters to be generated.

Enter the **NHI** or **Name** of the individual whose outstanding or completed letters you wish to view. The **Letter Name** can be specified from the drop-down list of options, along with the maximum number of results returned and the date range within which it was generated.

The following letter types can be generated by NIR:

- Confirmation of Amendment to Registration on NIR
- Confirmation of no further follow-up by NIR
- Confirmation of Opt-Off Status on NIR
- Confirmation of Registration on NIR
- Notifying Nominated Provider
- Referral to Outreach Immunisation Service

Typically an administrator will know the NHI or name of an individual for whom he or she wishes to view or generate a letter. Unfiltered searches will return all individuals with due letters, regardless of DHB.

Letter Task List Filter Options

Results can be sorted by any column by clicking the column title; click the title a second time to reverse the sort.

Removing a Letter

If a letter no longer needs to be generated, click its corresponding **Delete** icon. Letters are chosen for generation by selecting the checkbox in the **Select** column. Click the **Select All** button to select (or clear the selection) of all letters. Click the **Generate** button to generate the letter(s).

Viewing a Letter

Each letter is opened in a new screen, from which it may be printed.

100

14 May 2008

Ricky Jordan
56 Beach Road
Tauranga

Dear Ricky Jordan

Confirmation of Registration on National Immunisation Register (NIR)

Welcome to the National Immunisation Register (NIR). This letter is to confirm that your child has been registered onto the NIR. The NIR will record his/her immunisations and will help you and your health care provider to give your child their immunisations at the recommended ages.

The information below has been recorded on the NIR for your child. It is important that this is correct. If any of these details need to be changed please phone me, or correct this form and send it to me by fax or post.

Family name:	ALAWI	**Given names:**	Tiraariki
National Health Index number(NHI):	KKA5255		
Gender:	M	**Date of Birth:**	01/10/1999
Ethnicity:	NZ European / Pakeha. Other European.		
Address:	56 Beach Road Tauranga		
Telephone:			
Nominated GP:	Sam Eaves		
GP Practice:	Otumoetai Doctors Ltd		
Practice Address:	506 Otumoetai Road, Tauranga		
Well Child Provider:			

Registration on the NIR will help your child receive the immunisations needed for a healthy start in life. Please contact me if you want to:

- Find out more about the NIR
- Opt off having your child's future immunisation events recorded on the NIR

The vaccines on the immunisation schedule will protect your child from serious illnesses, such as pertussis (whooping cough) and measles. If you would like more information on immunisation, please contact your GP or practice nurse. You can also refer to the Ministry of Health website: www.moh.govt.nz/immunisation or the Immunisation Advisory Centre (IMAC) website: www.immune.org.nz or call IMAC toll-free on 0800 466 863 (0800 IMMUNE).

Baby's first immunisations are due at six weeks of age. We encourage you to contact your GP/Practice Nurse to arrange an appointment.

Yours sincerely

National NIR Administrator

Clicking the **Edit** button opens the letter in a second screen along with a number of editing tools. Fonts and font sizes can be changed, or a table and/or graphic added to the letter.

Editing the 'Confirmation of Registration' Letter

Once editing is complete, the letter can be printed, saved or opened in PDF format. If the latter is chosen, the letter could be saved and sent to an individual as an email attachment.

102

Rhapsody Administrator

The **Rhapsody Administrator** is found under the **Admin Tools** menu and is used to monitor the statistics relating to message movement between NIR, all administrators and the providers, to restart route components that may have failed and to track and correct messages that have not been delivered to their intended destination.

The **Rhapsody Management Console** is used to monitor NIR message activity.

Rhapsody Management Console, showing Routes with Stopped Communication Points

Rhapsody uses the concepts of Routes and Communication Points. A message travelling from, e.g. a provider to the central NIR system is said to move along a *route*. At each end of the route are *communication points*, connecting the route to the provider's computer and to the NIR server.

Both routes and communication points must be **started** in order for messages to flow.

Route Details

Click a route's **Select** icon ▶ to view the details of its throughput, associated communication points and a log of all auditable activities occurring on the route. An example screenshot, without the log, is shown in *Route Details*.

Route Details

Communication Point List

Selecting **Communication Points** from the **Monitoring** menu displays a list of all current communication points. This list can be filtered, as shown in Communication Point List, to show only Stopped communication points.

Communication Point List

A stopped communication point can be restarted by clicking the circled icon in the leftmost column.

Communication Point Details

Clicking the communication point's **Name** displays its Details screen, showing throughput, a list of the routes it is associated with, a log of associated auditable events plus its configuration details. These details should not be changed except by an experienced Rhapsody administrator.

Communication Point Details

Rhapsody Error Queue

Selecting **Error Queue** from the **Monitoring** menu displays a list of all messages that Rhapsody has not been able to process because they contain validation errors. Selecting such a message displays its contents in a new window, allowing the administrator to enter the correct details before resending it on to its intended recipient(s).

The error queue should be checked daily for messages with errors.

Reference Table Manager

The **Reference Table Manager** is found under the **Admin Tools** menu and is used to maintain many of the options such as DHB and Ethnicity codes found in the drop-down lists in various places in NIR. It is visible only to the NIR National administrator.

A portion of the Reference Table Manager is shown in *Reference Table Manager*:

Reference Table	DB Table Name	Description
Soprano Work Flow Reference Tables		
Soprano Workflow Engine provides following reference tables. Please note that a table may not exist in your database and you may import any reference table in the list if required.		
Address Type Code	lookup.LK_AddressType	Address type codes and their descriptions
Caregiver Relationship Code	lookup.LK_CaregiverRelationShip	Caregiver relationship codes and their descriptions
Clinic Type Code	lookup.LK_ClinicType	Clinic type codes and their descriptions
Coding System	lookup.LK_CodingSystem	Coding systems and their descriptions, of which a coding system is associated with a particular code
Contact Type Code	lookup.LK_ContactType	Contact type codes and their descriptions
Data Type Unit	lookup.LK_DataTypeUnit	Data type units and their descriptions
DHB Code	lookup.LK_DHBCode	DHB codes and their descriptions
Domicile Code	lookup.LK_DomicileCode	Domicile codes and their descriptions
Ethnicity Code	lookup.LK_EthnicityCode	Ethnicity codes and their descriptions

Reference Table Manager

Reference Table Item Details

An individual table is opened by clicking the **Select** icon to the left of its name; the *Ethnicity Code* table is shown in *Reference Table Ethnicity Code*:

Ethnicity Code	Description	Priority
❌ 10	European not further defined	20
❌ 11	NZ European / Pakeha	21
❌ 12	Other European	19
❌ 21	NZ Maori	1
❌ 30	Pacific Island not further def...	30
❌ 31	Samoan	7
❌ 32	Cook Island Maori	6
❌ 33	Tongan	5
❌ 34	Niuean	4
❌ 35	Tokelauan	2
❌ 36	Fijian	3
❌ 37	Other Pacific Island	8
❌ 40	Asian not further defined	14
❌ 41	South East Asian	10
❌ 42	Chinese	12

Reference Table Ethnicity Code

The Reference Code screen for a selected table consists of two parts:

1. **Search** panel - specify criteria to locate a particular table
2. **Results** panel - lists the entries which match the specified criteria (if any). If more than 15 entries are included in this list, navigation icons will be present to allow the display of additional entries

Each entry in the Ethnicity table has an associated **Priority** value. This is assigned according to a Ministry of Health standard and will determine which ethnicities will be included when a report is run that includes this data. For example, if an individual is recorded as having both a Fijian and Tongan ethnicity, the individual's Fijian ethnicity will be included in a report because of its higher priority (3 compared with 5).

The values in all reference tables should typically not be changed once they have been checked and approved by the Ministry of Health.

Maternity Facility Table

When configuring the **Maternity Facility** table, care must be taken to ensure that the specified name(s) exactly matches the **Clinic Name** used when the unit was first set up as a clinic.

Maternity Facility Table

Only those units referenced above will be included in the Maternity Download report; refer to NIR Reports for details.

DataMart Extract

NIR DataMart is a database of information extracted from NIR on a weekly basis and used for national and district reporting. DataMart reports contain non-identifiable data. All users who wish to have access to NIR DataMart must complete a **NIR DataMart New User Request Form** and have it approved by their DHB administrator.

Selecting the **DataMart Extract** item under the **Admin Tools** menu displays a screen similar to *Performing a DataMart Extract*, from which a DataMart extract for all or a single DHB can be run.

> ⚠ A DataMart extract can take quite a while to produce results; do **NOT** click the **Run** button repeatedly when nothing seems to be happening.
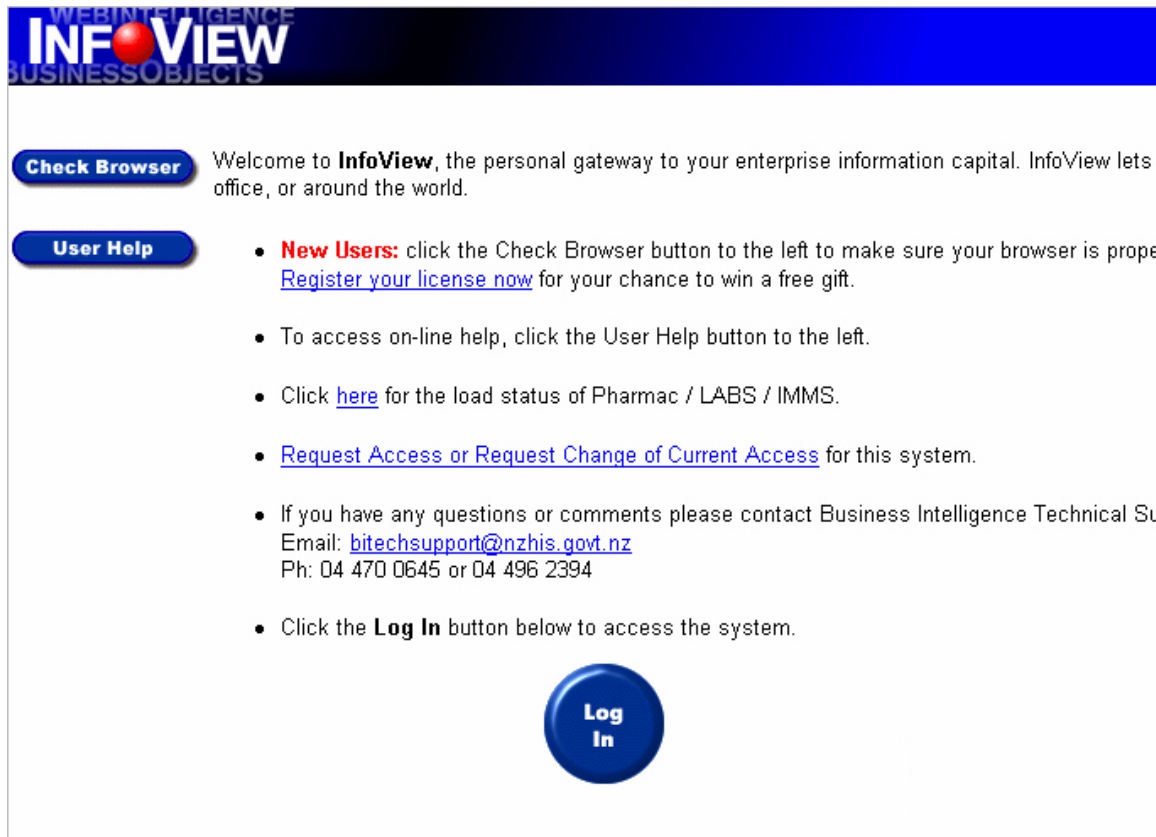
Performing a DataMart Extract

To locate the extract files, go to `\\hinnt5a\NIR\out\extracts` and select the DHB or the DataMart folder where the extract files will be available.

DataMart Access

The NIR DataMart is accessed via the Business Objects website: `http://bo.nzhis.govt.nz`. The **NIR DataMart Guide** can be obtained by email: `bitechsupport@nzhis.govt.nz`.

DataMart Welcome Page

f. National Reports

The purpose of NIR **National Reports** is to provide ready access to the information collected as individuals maintain their participation in their enrolled programmes. This information can be used to identify areas where further action is required, e.g. to:

- increase the level of public information in areas where immunisation rates are low
- locate individuals who need to be re-immunised following a problem with a vaccine
- identify individuals who have missed one or more of their scheduled vaccinations

A common feature of all reports is that filter criteria must be specified before clicking the **Generate** button. If this is not done, the report generation process could take a significant period of time and prevent other tasks from being completed on the computer. This is especially important for reports such as the **Vaccination Volumes** and **Vaccine List** reports.

The option to specify a DHB is present on many reports. If the current user is a DHB administrator, this will default to their own DHB, and cannot be changed. Only the National administrator can run reports for any (or all) DHBs.

Maternity Download Report

The **Maternity Download** report identifies all maternity facilities that have not sent in a maternity upload file in the previous 24 hours. There are no filter options; click the **Generate** button to generate the report.

Maternity Download Report

Only facilities included in the **Maternity Facility** table in the **Reference Table Manager** will be included in this report; refer to the Reference Table Manager tab in **Admin Tools** for details.

Birth Count Report

The **Birth Count** report includes a list of all individuals registered in one or more NIR programmes and will only look at children within the BIRTH COHORT. It returns a count of individuals born in 'place of birth' for the DHB, regardless of their current location. Each administrator in their respective DHB would be able to run this report to identify the number of children born in their DHB.

The filters include

- Place of Birth. DHB administrators use this report to identify all individuals born in their DHB without having to specify places of birth. National administrators can run this report independently of an individual's associated DHB
- Date of Birth date range

Birth Count Filter

The choice of **DHB** affects the **Place Of Birth** choices which then become available, which in turn affects the **Clinics** which can be selected. Selected places of birth and clinics can be added by clicking the **Add** icon. Click the **Clear** button to remove all selected places of birth, or click the **Delete** icon to remove individual clinics once they have been selected.

Once a clinic is selected, the child's **Nominated Provider** and **Well Child Provider** can be selected.

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

Birth Count Report

DHB Registered Population Report

The **DHB Registered Population** report produces a list of all registered individuals registered in a selected DHB between two specified dates. The report can be further restricted by the individual's ethnicity and/or gender. The report can also be used to identify those individuals who do not have a nominated provider.

Registered Population Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

The information in this Birth List Report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

Counties Manukau District Health Board

Generated On 09/06/2008 @ 15:28   Fax: 2760035

DHB Registered Population for : Counties Manukau DHB

This report lists all individuals, born between 01/01/2003 and 09/06/2008 who currently reside in the above DHB who are loaded onto the NIR

NHI	First Name	Family	DOB	Sex	Ethnicity	Nominated Provider/Clinic	Place Of Birth	Status
RRY0066	REBECCA SUSAN	Van Gerwen	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active
RRY0104	Ruojia	Stretton	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active
RRY0112	Indy-Sativa	MASUTTI	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active
RRY0139	Damian-rose	Prent	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active
RRY0147	HAYTHAM	TAATAA	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active
RRY0244	Brooklyn Dujiarn Shy	Brljevich	01/10/2003	M	Other European	Sam Eaves / Otumoetai Doctors Ltd		Active

DHB Registered Population Report

Overdue Tasks Report

The **Overdue Tasks** report includes a list of all registered individuals who have one or more overdue tasks in any NIR programme. Click the **Add** icon to open a search screen from which a clinic may be chosen. This may be repeated many times to include multiple clinics in the report.

Overdue Tasks Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
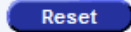- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

National Immunisation Register
Generated On 15/05/2008 @ 09:45

Counties Manukau District Health Board
Phone: 2760000 Fax: 2760035

National Immunisation Register
NIR: Recording immunisation history

Overdue Report For Mangere Health Centre Doctors Fax: 092550619 Phone: 092550600

This report lists by nominated provider, individuals with overdue tasks. If task is completed: Electronic Providers – resend event electronically, write "resent" on this form and return.   Manual Providers   - record event data in fields on form and return. If the task has been missed, complete the comments field below (e.g.declined by parental choice, sick, moved, given elsewhere - include GP and/or vaccinator) and return. Return is by fax to your NIR DHB Administrator on 2760035.
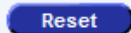
The information in this Overdue Report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

Nominated Provider: 'test' 'pneumo' 158211 NZNC

Complete these details

Name	NHI	Gender	DOB	Task	Due	Date Given dd/mm/yyyy	Code	Batch	Expiry (yyyymm)	Site (Code)	Responsible Provider	Vaccinator
Primo Gurjot HAUA-BARTLETT	SCR0771	M	31/05/2005	AG-DTaP-IPV-6w	12/07/2005							
				AG-Hib-HepB-6w	12/07/2005							
				AG-DTaP-IPV-3m	31/08/2005							
				AG-Hib-HepB-3m	31/08/2005							
				AG-DTaP-IPV-5m	31/10/2005							
				AG-HepB-5m	31/10/2005							
				Hib-15m	31/08/2006							
				MMR-15m ---------- Diluent	31/08/2006							

Resent   /   /   Comments (Reason if not completed):

| Te Rore Holdaway | SUJ3988 | F | 31/08/2005 | AG-DTaP-IPV-6w | 03/03/2006 | | | | | | | |

1 of 552

Overdue Tasks Report

Vaccination Volumes Report

The **Vaccinations Volumes** report includes a count of all vaccinations given at each clinic between two dates for a specified DHB. Click the **Add** icon to open a search screen from which a clinic may be chosen. This may be repeated many times to include multiple clinics in the report.

Vaccination Volumes Filter

This report is potentially very large. Ensure the specified criteria are not too wide, otherwise report generation could take an unacceptably long time.

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

Vaccination Volumes Report

Task Update Report

The **Task Update** report lists all immunisation tasks received by NIR between two dates. It can be narrowed to report on individual providers and/or DHBs. The filter options are shown in *Task Update Filter*; click the **Add** icon to open a search screen from which a clinic may be chosen. This may be repeated many times if required.

Task Update Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Task Update Report

Cold Chain Failure Report

The **Cold Chain Failure** report lists all instances of where a vaccine whose efficacy may have been compromised by a failure to keep it stored within the correct temperature range. All recipients of the vaccine are listed, as they may have to be contacted so that their vaccinations can be repeated. Click the **Add** icon corresponding to either the clinic or vaccine to open a search screen from which they may be chosen.

This action can be repeated if multiple clinics and/or vaccines are to be included in the report.

Cold Chain Failure Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

The information in this Vaccine Cold Chain Report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

National Immunisation Register	Bay of Plenty District Health Board
Generated On 15/05/2008 @ 11:06	Phone: phone 123 Fax: fax 123

Vaccine Cold Chain Report For Otumoetai Doctors Ltd

Fax: 075762327

This report lists all vaccinations completed between 01/05/2008 and 15/05/2008

Selected Vaccines: All

1	Name:	ROSE-ANGELA Baxter-Lavatai		NHI: ABC0026	DOB: 01/06/1999	Gender:	Male
	Address:	654 Lemon Road, Tauranga				Ethnicity:	Other European
Parent/Guardian:		Rick Wayne	Home Email	email32@scramble.com			
			Home Fax	9846104			
			Home phone	9145167			
			Mobile phone	4541463			
			Work phone	5681038			

Vaccine	Indication	Completed	Batch
23PPV	1	08/05/2008	5454
HepB	HepB Carrier mother	14/05/2008	1234

2	Name:	Robert Redford		NHI: RRD3401	DOB: 01/06/1999	Gender:	Male
	Address:	78 Bairds Road, Auckland				Ethnicity:	Other European
Parent/Guardian:		Peter Ian	Home Email				
			Home Fax				
			Home phone				
			Mobile phone				
			Work phone				

Vaccine	Indication	Completed	Batch
MeNZB	1:Primary Course	12/05/2008	4

Cold Chain Failure Report

Vaccine Recall Report

The **Vaccine Recall** report lists all individuals who have been given a vaccine with a specified batch number. This report is run whenever a batch is suspect and the individuals who have been given the corresponding vaccine need to be recalled so the vaccine can be given a second time. Click the **Add** icon to open a search screen from which a specific clinic may be chosen. This action can be repeated if multiple clinics need to be specified.

The DHB filter option refers to the physical location of the clinic in which the vaccination was given, not the DHB associated with the individual.

Vaccine Recall Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

The information in this Vaccine Recall Report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

National Immunisation Register	Bay of Plenty District Health Board
Generated On 17/11/2008 @ 15:39	Phone: phone 123 Fax: fax 123

Vaccine Recall Report For Otumoetai Doctors Ltd

Fax: 075762327

This report lists all vaccinations completed between 01/01/2008 and 01/05/2008

Selected Vaccine Batches: **1234**

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1   Name: **First AA**   NHI: **ABC0433**   DOB: **16/04/1979**   Gender: **Male**
  Address: **78 Forrester Drive, Tauranga**   Ethnicity: **NZ Maori**

Parent/Guardian: **Peter Ian**

Vaccine	Indication	Completed	Batch
DTaP-IPV-HepB/Hib	6w	16/04/2008	1234

---

2   Name: **ROSE-ANGELA Baxter-Lavatai**   NHI: **ABC0026**   DOB: **01/06/1999**   Gender: **Male**
  Address: **654 Lemon Road, Tauranga**   Ethnicity: **Other**

Parent/Guardian: **Rick Wayne Mobile phone 4541463**
  Rick Wayne Work phone 5681038
  Rick Wayne Home phone 9145167
  Rick Wayne Home Fax 9846104
  Rick Wayne Home Email email32@scramble.com

Vaccine	Indication	Completed	Batch
MeNZB	1:Primary	04/04/2008	1234

The information contained in this Vaccine Recall Report has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

Vaccine Recall Report

Vaccine List Report

The **Vaccine List** report lists all vaccines given between specified dates to individuals of a specified age range. The report can be further filtered by specifying a clinic or DHB. Click the **Add** icon to identify a specific clinic. Multiple clinics can be specified if required.

Vaccine List Filter

This report is potentially very large. Ensure the specified criteria are not too wide; otherwise report generation could take an unacceptably long time.

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar.

Click the **Generate** button to create the report using the specified filter and output conditions.

The Information in this Vaccine List Report contains Identifiable personal health Information about an individual or Individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

National Immunisation Register
Generated On 15/05/2008 @ 11:23

Bay of Plenty District Health Board
Phone: phone 123 Fax: fax 123

Vaccine List For Otumoetai Doctors Ltd

Fax: 075762327

This report lists all Immunisation tasks actioned between 01/05/2008 and 15/05/2008, for Individuals born between 01/01/1999 and 01/05/2000

Responsible Provider: Sam Eaves

Name: ROSE-ANGELA Baxter-Lavatai   NHI: ABC0026   DOB: 01/06/1999
Nominated Provider: Sam Eaves

Task	Indication	Status	Code	Due	Completed	Vaccinator	Site	Batch No.	Expiry Date
23PPV	1	Completed		01/06/2001	08/05/2008	TestDoctor,NoGivenName	RD	5454	05/2008
HepB	HepB Carrier mother	Completed		02/06/1999	14/05/2008	Eaves,Sam	RD	1234	05/2009

Name: Robert Redford   NHI: RRD3401   DOB: 01/06/1999
Nominated Provider: Sam Eaves

Task	Indication	Status	Code	Due	Completed	Vaccinator	Site	Batch No.	Expiry Date
MeNZB	1:Primary Course	Completed		12/05/2008	12/05/2008	Manukulasuriya,Upali	LD	4	05/2008

Name: Jaclyn Schell   NHI: ABC1898   DOB: 01/06/1999
Nominated Provider: Sam Eaves

Task	Indication	Status	Code	Due	Completed	Vaccinator	Site	Batch No.	Expiry Date
Hib-HepB	6w	Rescheduled	RESCHO	25/03/2007	08/05/2008				

Name: Jaclyn Schell   NHI: ABC1901   DOB: 01/06/1999
Nominated Provider: Sam Eaves

Task	Indication	Status	Code	Due	Completed	Vaccinator	Site	Batch No.	Expiry Date
Hib-HepB	3m	Rescheduled	RESCHO	26/03/2007	08/05/2008				
Hib	15m	Rescheduled	RESCHO	26/03/2007	08/05/2008				

Vaccine List Report

Outreach Referral Report - Detailed

The **Outreach Referral Report - Detailed** lists the contact details for all individuals, including parent/guardian details and historical information who have been referred to Outreach Services. The report also summarises the individual's programme enrollment details and a list of their completed and overdue tasks. Filtering by OIS Provider and Individual fields is only available when a DHB is specified. Note that individuals are listed by NHI, rather than name.

Outreach Referral Report - Detailed Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Outreach Referral Report - Detailed Report

Outreach Referral Report - Summary

The **Outreach Referral Report - Summary** presents similar information to the Outreach Referral Report - Detailed, except that the historical contact and address information is omitted. The information is presented in a compact, tabular format.

Outreach Referral Report - Summary Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

Outreach Referral Report - Summary Report

Vaccination by Antigen Report

The **Vaccination by Antigen** report lists all antigens given to individuals of a specified age, in a specified clinic and/or by a specified provider. The individual's ages can be specified in two ways:

1. **Age range** - select from the drop-down list of options and click the **Add** icon. Repeat to specify multiple age ranges
2. **Born After/Before** - specify the two dates between which individuals must have been born in order to be included on the report

Filter

Antigen (no selection="All")	⊗ Meningococcal B ⊕	Age range	0 - 2 Month 3 - 5 Month	Clear
Clinic (no selection="All")	⊗ Christchurch Family Clinic ⊕	Born After	01/01/2007	Reset
Nominated provider	▼	Born Before	18/11/2008	Reset
DHB	Canterbury ▼	Report Date	18/11/2008	Reset

Generate

This report may take several minutes to generate. Ensure that the filter criteria are not too wide before clicking the **Generate** button. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

National Immunisation Register
Generated On 18/11/2008 @ 08:46

Bay of Plenty District Health Board
Phone: phone 123 Fax: fax 123

National Immunisation Register
NIR Recording Immunisation Nation

Vaccination Report by Antigen, as at 18/11/2008

Clinic: Otumoetai Doctors Ltd
Nominated Provider: **All providers**
Fax: 075762327

Age as at 18/11/2008	Individual born	Total on NIR	Antigen	Indication / Dose	No. Eligible	No. Vaccinated	% Vaccinated	Due	OverDue	Not given - permanent contraindicatio	Not given - proven natural immunity	Declined - parental or individual choice	Re-scheduled	Closed
0 - 2 Months	19/08/2008 - 18/11/2008	33	Measles	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
			Rubella	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
3 - 5 Months	19/05/2008 - 18/08/2008	28	Measles	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
			Rubella	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0

Clinic: Otumoetai Doctors Ltd
Nominated Provider: **Sam Eaves**
Fax: 075762327

Age as at 18/11/2008	Individual born	Total on NIR	Antigen	Indication / Dose	No. Eligible	No. Vaccinated	% Vaccinated	Due	OverDue	Not given - permanent contraindicatio	Not given - proven natural immunity	Declined - parental or individual choice	Re-scheduled	Closed
0 - 2 Months	19/08/2008 - 18/11/2008	30	Measles	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
			Rubella	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
3 - 5 Months	19/05/2008 - 18/08/2008	28	Measles	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0
			Rubella	15m	N/A	0	N/A	0	0	0	0	0	0	0
				4y	N/A	0	N/A	0	0	0	0	0	0	0

The information contained in this Vaccination by Antigen Report has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

Vaccination by Vaccine Report

The **Vaccination by Vaccine** report lists all vaccines given to individuals of a specified age, in a specified clinic and/or by a specified provider. The individual's ages can be specified in two ways:

1. **Age range** - select from the drop-down list of options and click the **Add** icon. Repeat to specify multiple age ranges
2. **Born After/Before** - specify the two dates between which individuals must have been born in order to be included on the report

Vaccination by Vaccine Filter

This report may take several minutes to generate so it is important that the specified criteria are not too wide.

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

National Immunisation Register
Generated On 18/11/2008 @ 08:35

Bay of Plenty District Health Board
Phone: phone 123 Fax: fax 123

Vaccination Report by Vaccine as at 18/11/2008

Clinic: Otumoetai Doctors Ltd   Fax: 075762327
Nominated Provider: **Sam Eaves**

Age as at 18/11/2008	Individual born	Total on NIR	Scheduled Vaccine	Dose/ Indicator	No. Eligible	No. Vaccinated	% Vaccinated
Other	01/01/2007 - 18/11/2008	1584	DTaP-IPV	6w	1496	69	5%
				3m	1496	16	1%
				5m	1487	18	1%
				4y	N/A	2	N/A
			MeNZB	1:Primary Course	431	332	77%
				2:Primary Course	431	57	13%
				3:Primary Course	429	27	6%
				4:Primary Course	349	3	1%

The information contained in this Vaccination Report by Vaccine has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

Vaccination by Vaccine Report

Vaccination Coverage Report

The **Vaccination by Coverage** report shows the percentage of individuals, by nominated provider, who have received all due vaccinations (by antigen). The age of the individuals to be included in the report can be specified in two ways:

1. **Age range** - select from the drop-down list of options and click the **Add** icon. Repeat to specify multiple age ranges
2. **Born After/Before** - specify the two dates between which individuals must have been born in order to be included on the report

Vaccination by Coverage Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Programme Status Report

The **Programme Status** report lists all individuals born within a specified date range and having a specified programme status. Note that either a public health district or a DHB can be specified - not both. Select a programme status from the drop-down list of options and click the **Add** icon to include individuals with that status in the report. This can be repeated to include multiple status options.

Programme Status Filter

This report is potentially very large. Please ensure the specified criteria are not too wide, otherwise report generation could take an unacceptably long time. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Programme Status Report

Epidemic Report

The **Epidemic** report lists all individuals born between specified dates and who have not received their full course of vaccinations for the specified antigen. This report is used to identify the most at-risk individuals should an epidemic of the associated disease occur. Note that either a public health district or a DHB can be specified - not both. Select a **Census Area Unit** or **Territorial Authority** from the drop-down lists and click the **Add** icon. This can be repeated if multiple items are to be included in the report.

Epidemic Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Epidemic Report

Well Child Overdue Report

The **Well Child Overdue** report lists all children enrolled in the Well Child programme who are overdue for one or more of their tasks.

> ⚠ Only NIR administrators who are members of the *Well Child Overdue Report* Concerto group will be able to access this report.

Well Child Overdue Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

Well Child Overdue Report

Well Child Volumes Report

The **Well Child Volumes** report includes a count of all vaccinations given at selected PHOs or clinics between two dates for a specified DHB. Click the **Add** icon to open a search screen from which a PHO or clinic may be chosen. This may be repeated many times to include multiple entries in the report.

> ⚠ Only NIR administrators who are members of the *Well Child Overdue Report* Concerto group will be able to access this report.

Well Child Volumes Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

Kidslink-NIR
Generated On 15/05/2008 @ 12:40

Well Child Volumes Report for Bay of Plenty DHB

Phone: phone 123 Fax: fax 123

This report counts the number of Well Child Checks up to 15/05/2008, by Well Child Clinic

Well Child Clinic	Well Child Event								
	2-4 week	6 week	3 month	5 month	9 month	15 month	24 month	3 year	School Ent.
Browns Bay Medical Centre	2	1	1	0	1	1	0	0	0
Total for all clinics selected	2	1	1	0	1	1	0	0	0

The information contained in this Well Child Volumes Report has been derived from the National Immunisation Register database. Whilst the Ministry of Health has taken all reasonable steps to ensure that the information contained within this report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied upon.

Well Child Coverage Report

The **Well Child Coverage** report shows the number and percentage of individuals who have received their vaccinations. The only criterion for this report is the range of birth dates for included individuals.

> ⚠️ Only NIR administrators who are members of the *Well Child Overdue Report* Concerto group will be able to access this report.

Date of Birth (from)	15/01/1999	Reset	Date of Birth (to)	01/05/2004	Reset

Generate

Well Child Coverage Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

The information in this report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

Generated On 15/05/2008 @ 12:46

Wellchild Coverage Report

This report lists all individuals born between 15/01/1999 and 01/05/2004.

WellChild Checks	Number Eligible	Coverage							
		Overall		Maori		Pacific Is		Other	
		No	%	No	%	No	%	No	%
6 wks	12703	10518	83	3479	87	111	90	8028	94
3 mths	12703	10258	81	3159	79	109	88	7473	87
5 mths	12703	9978	79	2982	75	96	77	7174	84
9 mths	12703	8886	70	2516	63	92	74	6402	75
15 mths	12703	5403	43	1558	39	54	44	3809	44
24 mths	12703	1636	13	500	12	13	10	1123	13
3 years	12703	52	0	13	0	0	0	39	0
5 years	4782	0	0	0	0	0	0	0	0

The information contained in this report has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

Well Child Coverage Report

Well Child Ethnicity Coverage Report

The **Well Child Ethnicity Coverage** report shows the number and percentage of individuals who have received their vaccinations, broken down into the major ethnicity groupings. The only criterion for this report is the range of birth dates for included individuals.

> ⚠ Only NIR administrators who are members of the *Well Child Overdue Report* Concerto group will be able to access this report.

Well Child Ethnicity Coverage Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

The Well Child Ethnicity Coverage Report

BC: Child - Provider Status Summary Report

The **BC: Child - Provider Status Summary Report** identifies the number of children in a selected DHB who have, or do not have, a nominated provider. The only criterion for the report is the selection of the DHB.

DHB	Bay of Plenty ▾	Born After		🗑	Reset
		Born Before	09/06/2008	🗑	Reset
					Generate

BC: Child - Provider Status Summary Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

The information in this report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

Generated On 15/05/2008 @ 12:52

Wellchild Ethnicity Coverage Report

This report lists all individuals born between 01/01/1999 and 01/01/2002.

WellChild Checks	% Ethnicity Coverage							
	NZ Maori	Samoa	Cook Is Maori	Tongan	Niuean	Tokelauan	Fiji	Other P I
6 wks	0	0	0	0	0	0	0	0
3 mths	0	0	0	0	0	0	0	0
5 mths	0	0	0	0	0	0	0	0
9 mths	0	0	0	0	0	0	0	0
15 mths	0	0	0	0	0	0	0	0
24 mths	0	0	0	0	0	0	0	0
3 years	0	0	0	0	0	0	0	0
5 years	0	0	0	0	0	0	0	0

The information contained in this report has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

BC: Child - Provider Status Summary Report

BC: Child - Provider Status Detailed Report

The **BC: Child - Provider Status Detailed Report** identifies the names of children in a selected DHB who have, or do not have, a nominated provider. Criteria for this report are the selection of the DHB and the Provider Status.

BC: Child - Provider Status Detailed Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

BC: Child - Provider Status Detailed Report

BC: Child - Nominated Provider Status Detailed Report

The **BC: Child - Nominated Provider Status Detailed Report** lists the providers associated with the selected DHB, along with the NHI numbers of children for whom the provider is their nominated provider. The only criterion for the report is the selection of the DHB.

BC: Child - Nominated Provider Status Detailed Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

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Generated On 09/06/2008 @ 14:34

Bay of Plenty District Health Board

Fax: fax 123

Birth Cohort & Childhood Immunisation Children - Nominated Provider Status Detailed

This report lists individuals born up to 09/06/2008

Clinic	Clinic Address	Provider Name	NHI Number	DOB	Confirmation Due Date
Bayfair Doctors	42 Girven Road Mount Maunganui	Johann Coetzee	ABC4471	05/02/2008	05/06/2008
Belmont Medical Centre	3 Williamson Avenue Belmont North Shore City	Christopher Diggle	SPP2455	01/10/1999	23/03/2006
Bethlehem Family Doctor	14 Elder Lane Bethlehem Tauranga	A Steinberg	ABC4498	05/02/2008	05/06/2008
Bethlehem Family Doctor	14 Elder Lane Bethlehem Tauranga	Nigel Kim	RTC1038	04/10/1987	28/06/2006
Bethlehem Medical Centre	16 Bethlehem Road Tauranga	Alan Johnson	BHE4856	27/05/1985	12/02/2008
Bethlehem Medical Centre	16 Bethlehem Road Tauranga	Alison Fawdry	SCC4580	06/05/2005	28/06/2006
Bethlehem Medical Centre	16 Bethlehem Road Tauranga	Suzanne Rowdon	SCN7354	26/05/2005	29/06/2006
BOP Clinic	100 main street Whakatane	Rumple Stiltskin	KKA6227	26/02/2006	17/03/2006

BC: Child - Nominated Provider Status Detailed Report

Associate Provider Summary Report

The **Associate Provider Summary Report** is a summary of all individuals associated with the listed provider and his or her clinics. The report is used to inform providers of all their associated children in the NIR. This will be particularly useful for manual providers, including Well Child and LMCs. They will be able to check to see that they have notified us of all of the children from whom they have received referrals from outside of NIR. Currently this information is only available for OIS through the OIS reports and GPs through the **Vaccine List Report**.

The Associate Provider Summary Report can be used to share information on the NIR with health providers as it only provides basic information about the individual. No information about any other providers or immunisation events is included in this report.

Associate Provider Summary Filter

The **Generate to:** selection determines the report's output format:

- PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

The information in this Associate Provider Report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

National Immunisation Register				Waitemata District Health Board				
Generated On 18/11/2008 @ 09:34				Phone: ph 123 Fax: fax567				

Associate Provider Report (Summary) for Browns Bay Medical Centre and Sam Eaves

This report is a summary of all individuals associated to the above provider, born between 01/01/2007 and 18/11/2008

Last Name	First Name	NHI	Ethnicity	Gender	DOB	Age	Address	Phone	Nominated Provider	NOK	Relationship
Smith	Ian	STD0529	NZ Maori	Male	05/02/2008	0 y 9 m	12 Fox St, Hamilton		No		
CODLING	CYNTARA	STD3536	European not further defined	Male	07/05/2007	1 y 6 m	10 McCullough Ave, Papatoetoe, Auckland		No		

Number associated with Sam Eaves = 2

Total = 2

The information contained in this Associate Provider Report has been derived from the National Immunisation Register database. While the Ministry of Health has taken all reasonable steps to ensure that the information contained within the report is accurate and complete, it accepts no liability or responsibility for the manner in which the information is subsequently used or relied on.

Associate Provider Summary Report

Associate Provider Detailed Report

The **Associate Provider Detailed** report provides detailed information for each of the individuals associated with one or more of the specified providers. This report is based on the Outreach Referral Report (Detailed) and provides full details about a child including name, DoB, age, NHI, merged NHIs, alias names, ethnicity/s, address (current & previous), contacts (phone numbers, etc), all associated providers (including GP, LMC, WCP, etc) and would also give a summary of immunisation details (as per the OIS report).

This report will be a key tool as it provides Well Child providers with information about their patients and to help share this information with all health providers. This is key to promoting and ensuring that children are up to date with immunisations.

Select the DHB followed by one or more clinics and providers. Once a provider has been selected, his or her associated individuals can be selected from the **Individuals** drop-down list and added to the criteria.

Associate Provider Detailed Filter

Click the **Generate** button to create the report using the specified filter conditions. The report is opened in Adobe® Reader® in a new window, from where it may be printed or saved to a specified location.

National Immunisation Register
Generated On Nov 18 2008 @ 09:45

Bay of Plenty District Health Board
Phone: phone 123 Fax: fax 123

Associate Provider Report (Detailed) for Jaclyn Schell with Sam Eaves

The information in this report contains identifiable personal health information about an individual or individuals. You are reminded of your obligations under the Privacy Act 1993, Health Information Privacy Code 1994, National Immunisation Privacy Policy and the NIR Authorised User Agreement to ensure that this information is treated confidentially.

Name: Jaclyn Schell   **DOB:** 01/01/2008   **Age:** 0 y 10 m

NHI	AAA0128
Merged NHI's	AAB1081
Alias Names	adfa adfasdf

Ethnicity Samoan   **Gender:** Female

Address Current Address Detail

Type	Details	Effective
Current	4 Inland Road, Kerikeri, Northland	19/01/2004

Previous Address Detail

Type	Details	Effective
Current	Not Specified, Not Specified	20/10/2008
Current	4 Inland Road, Kerikeri, Northland	19/01/2004

Contacts Current Contacts Detail   Previous Contacts Detail

Type	Details	Type	Details

Parent/Guardian   **Name:** Peter Ian   **Relationship:** Father   **Primary:** NO

Address

Type	Details	Effective
Current	Not Specified, Not Specified	31/10/2008

Contacts Current Contacts Detail   Previous Contacts Detail

Type	Details	Type	Details

Associated Providers

Name	Providers Clinic	Role
Sam Eaves (Nominated)	Otumoetai Doctors Ltd	GP

Programme: Childhood Immunisation
Status: Active

Associated Providers Clinic
Sam Eaves (Nominated)   Otumoetai Doctors Ltd

Task / Indication / Dose	Due	Completed	Status:	Responsible	Clinic
DTaP-IPV-Hep B/Hib-3M	26/10/2008	28/10/2008	Completed	Sam Eaves	Otumoetai Doctors Ltd
DTaP-IPV-Hep B/Hib-5M	07/12/2008	01/08/2008	Completed	Sam Eaves	Otumoetai Doctors Ltd
DTaP-IPV-Hep B/Hib-6W	20/02/2008	20/02/2008	Completed	Sam Eaves	Otumoetai Doctors Ltd
** PCV7-6W	14/09/2008		Overdue		
PCV7-3M	26/10/2008		Due		
PCV7-15M	01/04/2009		Future		
MMR - 15m	01/04/2009		Future		
Hib-15m	01/04/2009		Future		

Page 1 Of 2

Associate Provider Detailed Report - top

Duplicate Dose Search

The **Duplicate Dose Search** is used to recall all instances where an individual was given one or more repeats of the same vaccination. This report is used frequently for the MeNZB campaign, and although it will not be needed to the same extent for the BC Childhood immunisations, it will still be useful to identify invalid information, genuine occurrences of duplicate immunisations and will be very useful for any other mass vaccination programme.

Specify the **DHB** followed by the **Programme** and **Programme Group**. Click the **Generate** button to generate the report.

Duplicate Dose Search Filter

The results are sorted by the **NHI** of individuals who have been given duplicate vaccine doses. Sort by any other column by clicking its title; click a second time to reverse the sort.

Click any entry to open the **Individual Details** screen for that person.

NHI	Task	Number of Times Occured
ABC1235	MeNZB1	2
BHY3203	MeNZB3	2
BSY6769	MeNZB2	2
BTD5143	MeNZB1	2
CFV8351	MeNZB2	2
CFV8351	MeNZB3	2
CGC0140	MeNZB2	2
CLA2522	MeNZB1	2
CLA6978	MeNZB2	2

Printer friendly version Download CSV results   >>   Results 1-25 of 12,472

Duplicate Dose Search Results

Click the *Printer friendly version* link to import the results into Adobe® Reader®, from where they may be saved in `.pdf` format or printed. Click the *Download CSV results* link to save the results as a `.csv` (comma separated value) file, which can be loaded into *Microsoft® Excel* for further analysis.

Missing Dose Report

The **Missing Dose** report lists the children for whom one or more of their scheduled tasks have either not been completed, declined or closed, or a recognised alternative has not been given.

Select a vaccine from the drop-down list then click the **Add** icon to add it to the criteria. This action can be repeated if multiple vaccine criteria are to be included. Date of birth **From** and **To** dates are selected by clicking the **Calendar** icon.

Report Search Filter			
DHB	Auckland	DHB Type	● Patient ○ Clinic
Programme	Childhood Immunisation	Date of Birth (from):	01/01/2004
Programme Status		Date of Birth (to):	25/08/2009
Vaccine	DTaP-IPV MMR [Clear]	Generate to:	PDF
	⊕		[Generate]

Missing Dose Filter

The **Generate to:** selection determines the report's output format:

* PDF - the report is opened using Adobe® Reader® in a new window, from where it may be printed or saved to a specified location
* Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

Click the **Generate** button to create the report using the specified filter and output conditions.

Missing Dose Report

Due Tasks Report

The **Due Tasks** report lists all registered individuals who have one or more due tasks in any NIR programme. For the purposes of this report, a 'Due Task' is one that the individual has scheduled for processing within the next configurable period of time, up to a maximum of six weeks.

Click the **Search** icon to open a window in which a sub-search for a specific clinic can be run. **DHB**, **Programme Group** and **Programme** are all required selections. Date of Birth **From** and **To** dates are selected by clicking the **Calendar** icon.

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- Comma Separated Values (CSV) - a standard *Windows®* **Save** dialog is opened, from which the name and location of the CSV file can be specified. The report can then be viewed in *Microsoft® Excel* or similar

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