National Immunisation Register: DHB Administrator Manual
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1.1. Overview

1.1.1. The National Immunisation Register

The National Immunisation Register (NIR) information system aims to improve the delivery of immunisation services by providing an accurate record of an individual’s immunisation history across the primary, community and secondary health sector. The NIR is comprised of customised Soprano Workflow Engine (SWE) software and the Rhapsody Message Interface Manager and is capable of managing a wide variety of programmes.

Users of the system will include general practitioners, Plunket, midwives, public health nurses, Iwi providers and others. They will access the system either through a web browser or through their own information systems.

The purpose of this DHB NIR Administration manual is to provide background information and an explanation of the use of the NIR system. It does not provide a full explanation of Soprano Workflow Management or Rhapsody, but focuses specifically on the NIR Register.

1.1.2. Concerto

The National Immunisation Register is a computer application written to work with Concerto, a product of Orion Systems International Limited. Orion is a New Zealand based company whose products are widely used in the health community.

Concerto, and hence the NIR, runs inside Microsoft’s Internet Explorer. Internet Explorer is a web browser similar to the one most people use at home to surf the Internet. Many of the keys and shortcuts familiar to users of the Internet can also be used with the NIR; for example:

- single clicking a link or icon to move to a following screen
- pressing the Tab key to move to the next field in a form (or Shift-Tab to move backwards through the form)
- pressing F11 to expand the NIR to full screen (press F11 a second time to restore the screen to its default view)
- pressing F5 to refresh the information on the screen
- using Alt+F4 to close the NIR application

1.1.3. Intended Audience

The intended users of this document are the District Health Board (DHB) NIR administrators responsible for maintaining the efficient functioning of the system. They are expected to have a good level of familiarity with the Concerto Medical Application Portal and of immunisation programmes in general.
1.1.4. Manual Conventions

<table>
<thead>
<tr>
<th>Convention</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Names of buttons and icons appear in bold text</td>
<td>Click <code>&lt;buttonname&gt;</code> to return to the previous screen</td>
</tr>
<tr>
<td>Selections from drop-down lists and context menus are italicised</td>
<td>Select <code>&lt;Edit Row&gt;</code> to amend an address</td>
</tr>
</tbody>
</table>

Table 1.1. Manual Conventions

1.2. The NIR System

1.2.1. Aims

The National Immunisation Register will benefit individuals by facilitating delivery of immunisation services while providing an accurate record of that individual’s immunisation history. The Register will provide national and district level information on immunisation coverage rates and will assist in achieving New Zealand’s immunisation coverage targets. This will improve individual and community-wide health through the control or elimination of vaccine-preventable diseases.

1.2.2. Benefits

The NIR System has been designed to function primarily by integrating with existing Practice Management Systems (PMS) to capture and present data about individuals. Using a web interface to provide access to this data offers the following advantages:

- the screens have a clean and uncluttered appearance and can be regularly refreshed with up to date information on an individual’s position within the NIR Register
- everything that can be done in the PMS can be duplicated with the web interface by viewing, editing and otherwise managing individual data
- the screens have a consistent and familiar appearance to most users who have already used a web browser to access the Internet
- additional functionality over and above that offered by the PMS is available, such as the ability to communicate electronically with a wide range of health care providers

The health care provider benefits from using the NIR in a number of ways:

- recall lists are shorter, because if an individual sees a different provider for a scheduled visit, they will not appear on the recall list
- treatments are safer and more accurate because if an unfamiliar individual comes to a provider, the provider can check their status on the database rather than relying on information provided by the caregiver
- where individuals have missed treatments, they can be identified using their nominated GPs and Well Child providers
- the overall provider-individual relationship is improved and cemented

1.2.3. How it works

In many cases, GPs will not use the NIR directly. Their role will be to send and receive messages using their own PMS, which will manage the communication with the NIR system. GPs are able to obtain individual information from the NIR using browser access, Status Query messaging, or by contacting the NIR administrator by telephone or fax.

The following information flow diagrams illustrate the way that the NIR works in a number of situations.
1.2.4. Registration of a New Individual

The main aim of the NIR is to maintain a record of the care of all individuals to improve their standard of health and to minimise the risk of epidemic. Ensuring that newborns are entered into the system is the most efficient way of capturing the required information.

When an individual is born, the individual’s parent/guardian(s) are informed that the individual will be registered on the NIR (An individual’s parent/guardians have the right to opt them off the database at any stage; see the NIR 5.0 Privacy Policy for more information). As part of this registration, parent/guardians have the option to nominate an immunisation provider for the individual.

As well as parent/guardian and nominated provider information, other providers associated with the individual can be identified in the NIR. This can include other GPs, Well Child providers (WCP) and Lead Maternity Carers (LMC). When these details are entered into the NIR system, the nominated provider is informed they have been chosen by the individual’s parent/guardian(s).

In the information flow diagram above, the new individual is registered onto the NIR with all the necessary information and the nominated provider is notified. The provider responds by Accepting or Declining the registration.

Where the nominated GP declines the nomination, the individual’s DHB administrator is notified by the NIR. He or she must then contact the individual’s parent/guardian(s) to identify an alternative nominated provider.

1.2.5. When an Individual’s Immunisation Becomes Due

GPs are responsible for maintaining their own records of an individual’s immunisations and when they are due, achieved using their PMS.

Task Update Messaging

When a task becomes due, the individual’s parent/guardian(s) are contacted by the nominated provider to arrange an appointment. Once the individual has presented for the task, the results are sent to the NIR (for the purposes of the NIR, the result is simply that the task has/has not been carried out). The NIR then sends a task update message to other providers associated with the individual (providers can elect to stop receiving messages if they do not consider them to be relevant).

Overdue Messaging
When a task becomes overdue (exceeds task overdue alert period), the NIR System generates an overdue message and sends it to the provider. The individual's nominated provider (using their follow-up procedures) contacts the individual's parent/guardian(s) to arrange an appointment. Once the individual has presented for the task, the results are sent to the NIR, which in turn updates associated providers. Note: The NIR will only generate reminders when a task becomes overdue and where the provider has elected to receive overdue notifications.

1.2.6. Individual Presents to a Different GP

Another issue with the traditional record keeping system was that there was no way for a health care provider to know if one of their individuals had received treatment from another provider. This meant that the nominated provider could spend considerable time chasing up on individuals who had in fact already received treatment. A second problem was that if an individual presented to a provider other than their nominated provider, the provider was unable to accurately gauge the individual's status, which could result in the individual receiving the wrong immunisation or treatment.

Because the NIR provides a centralised repository for this information, these issues are eliminated.

Status Query and Update

When an individual presents to a new provider, the provider contacts the NIR to obtain the individual's status. This is achieved using the Status Query functionality, either through messaging or web browser. When the individual's status is returned, the GP can carry out any required tasks with confidence that they have not already been completed.

Completed task details are sent to the NIR and to all providers who have opted to receive notification when scheduled tasks have been completed by another provider. The new provider is considered an associated provider for the individual from this point on, but he or she can elect to stop receiving update messages if they do not consider them to be relevant.
1.2.7. Individuals not Fully Vaccinated

In the past, it has proved difficult to identify individuals without a medical record and who were, as a result, missing out on their health care benefits. Now that most individuals are registered on the NIR from birth, a process exists by which these individuals can be identified and located, minimising the chance that they will not be seen by health care providers.

When a task becomes due and none of the individual’s providers can locate the individual, the NIR DHB administrator for that individual is notified. He or she can then engage an Outreach Services provider to locate the individual and complete any outstanding tasks. The administrator can record and update the process within the NIR System. The result is that either the individual is located and their record is updated with their completed vaccinations or that the NIR obtains a reason for the loss of contact, such as relocation or the death of the individual.

1.2.8. Programmes

Individuals can be registered on a range of Immunisation programmes, including Childhood Immunisation, Meningococcal B, HepB, Pneumococcal and BCG. Each programme included the following features:

- **Rules** - which govern when a task is to be scheduled. Task scheduling rules take into account the individual's age and the dates when earlier tasks were completed
- **Data Items** - which capture information recorded at the time a task is completed. Data items include the expiry date and batch number of a vaccine, the body site where the vaccine was administered and the name of the vaccinator who administered it
2. NIR User Management

2.1. Getting Started with Concerto

2.1.1. Logging in

Click the link on your desktop or enter the address provided by an administrator to display the NIR Login page. Type your username and password, remembering that the latter is case-sensitive. Click Login when ready to proceed.

![NIR Login Page]

2.1.2. First Time Login

If this is the first time you are logging in to the NIR, the system administrator will have given you a username/password combination to use. The password will be valid once only; after logging in you will immediately be asked to change it to one of your own choosing.

![Password Expired Alert]

The Change Password screen.
Note that you have to enter the new password twice, to ensure no mistakes have been made. Your password should be at least six characters long, include UPPER and lower case letters, and should have a mixture of letters, numbers and special characters such as the exclamation and question marks. It should be easy for you to remember and difficult for others to guess, and should not be the same as any other password you have.

Your NIR password expires automatically every three months, and will have to be re-entered. You will not be able to specify a password you have used previously.

2.1.3. Standard Screen Layout

The first screen seen by users following login is the NIR Welcome screen - shown below:

The following table describes the different screen regions...
The **Context Bar** is initially empty when you login in. Once you have searched for and selected an individual’s record, however, the Context Bar displays his or her name, NHI Number and Date of Birth, along with icons to easily switch to the other NIR screens.

**System Date and Time**
Displays the current date and time

**Close Application icon**
Click the Close Application icon to close the NIR application

**Menu Panel**
The menu panel runs down the left hand side of the screen. The **Common** menu is available to all users and includes the **My Details** screen. The **Concerto** menu contains a link to adding new users while the **Searches** menu holds the different individual and provider search options. **Admin Tools** is only available to administrators and include links to correcting messages with errors and accessing the MOH DataMart.

**Username**
The currently logged in user's Username

**Logout**
Click to **Logout** from the NIR application and return to the log in screen

**Expanded Menu**
An expanded menu contains icons that enable access to the functionality within an application

**Help**
Click to display a Help screen giving information related to the screen you are currently viewing

**Autohide**
Click to hide the Menu Panel. This provides more screen space to view an individual's details

<table>
<thead>
<tr>
<th>Table 2.1. NIR Screen Components</th>
</tr>
</thead>
</table>

| **2.1.4. Common Screens** |

| **2.1.4.1. My Details** |

The **Common** menu is available to all NIR users, regardless of their role in the system. One of the icons in this menu is labelled **My Details**; clicking this icon opens a screen which displays information relating to the currently logged in user.

![My Details Screen - Provider User](image)

**Figure 2.1. My Details Screen - Provider User**

**My Details** includes:

- the **Groups** the user belongs to (which determines the screens they can see and edit)
- their full name and email address
- the DHB with which they are associated
- their provider ID and the name of its issuing authority (typically either NZMC or NZNC)

Most importantly, the user can update his or her **password** from the **My Details** screen.
Home page

A provider’s home page is the first screen seen following login. This can be selected from the drop-down list of options, and will typically be a screen that is accessed frequently. A Provider’s home page can be re-displayed at any time by clicking the Home icon located at the top of the menu bar.

Inactivity Timeout

The Inactivity Timeout is a period of time in which, if no user activity is detected, the system will log itself out. This is a security feature to ensure that no private information is displayed on screen while the computer is potentially unattended. Typically this will be set to between 15 and 30 minutes.

2.1.4.2. Version Summary

The second icon under the Common menu is labelled Version Summary; click to display the version number of the application you are currently using. This information may be required by the Help Desk if you request assistance.

Figure 2.2. The NIR Version Summary Screen

2.2. User Accounts

2.2.1. Overview

An NIR DHB administrator is responsible for setting up and maintaining the list of Provider Browser and other users of the NIR who are associated with their DHB. There are eight categories of browser users that DHB administrators are able to create:
### Table 2.2. User Account Types

<table>
<thead>
<tr>
<th>Provider Browser</th>
<th>Any provider who maintains records via browser over the Health Intranet. Provider Browsers are providers who do not have their own PMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Enterer</td>
<td>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</td>
</tr>
<tr>
<td>Non-Vaccinating Provider</td>
<td>A provider who is <em>not registered</em> on the system as someone who performs vaccinations. They can not modify or record information, they may only use the system to access status query or other defined reports</td>
</tr>
<tr>
<td>Identifiable Reports Browser</td>
<td>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</td>
</tr>
<tr>
<td>Non-identifiable Reports Browser</td>
<td>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 and NIR auditors and evaluators. They have access to Non-Identifiable Reports only</td>
</tr>
<tr>
<td>Status Query Browser</td>
<td>This group includes Medical Officer 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</td>
</tr>
<tr>
<td>MDIP Data Enterer</td>
<td>Users employed by the MOH to enter data relating to the MeNZB programme into the NIR</td>
</tr>
<tr>
<td>MVS Data Management and CARM</td>
<td>Provides MVS Data Management with the ability to search and view any data within the NIR for those individuals who are on the MeNZB programme (i.e. have received or have a MeNZB event scheduled). This access will be read only. MVS Data Management users can be set up with access to all data (via a national option) and 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 (the Center for Adverse Reaction Monitoring) users also need the ability to perform daily lookups.</td>
</tr>
</tbody>
</table>

#### 2.2.2. Concerto Search

To access the *User Search* screen, click the **Concerto Users** icon in the **Concerto** menu. This screen allows a DHB administrator to search for one or more NIR users associated with his or her DHB, and is also the point of entry for editing existing user accounts and/or adding new ones.

![Figure 2.3. User Account Search Options](image)

**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.

### 2.2.2.1. Concerto Search

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>The name used to log in to the 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.</td>
</tr>
<tr>
<td>Member of</td>
<td>The groups the user is associated with. Group membership controls what you see and can do in the NIR.</td>
</tr>
<tr>
<td>Full Name</td>
<td>The user’s full name. Specify <em>firstname lastname</em> or <em>lastname, firstname</em></td>
</tr>
<tr>
<td>Email</td>
<td>The user’s email address</td>
</tr>
<tr>
<td>Favourite Search</td>
<td>Use to save and quickly recall useful searches</td>
</tr>
</tbody>
</table>

*Table 2.3. User Account search Options*

When results are returned from a search, they are listed in the **Search Results** panel. Clicking the 'Printer friendly version' link at the bottom of the screen exports the results list into Adobe Acrobat Reader, from where it may be printed and/or saved to a specified location as required.

### 2.2.2.2. Search Results

The **Search Results** are displayed in seven columns:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>User login ID</td>
</tr>
<tr>
<td>Full Name</td>
<td>Family name followed by given name</td>
</tr>
<tr>
<td>Email</td>
<td>User’s email address</td>
</tr>
<tr>
<td>Description</td>
<td>General description of the User usually in terms of role or permissions</td>
</tr>
<tr>
<td>User Details</td>
<td><strong>User Details</strong> icon. Clicking this icon has the same effect as clicking elsewhere in the row. Opens the <strong>User Details</strong> screen</td>
</tr>
</tbody>
</table>

*Table 2.4. Search Results Display*

Click any row to open the **User Details** screen for updating.
2.2.3. Adding a New User Account

The first step in adding a new NIR user is to select **Concerto Users** from the **Concerto** menu. Create 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. eg: Max Headroom = Headrom. Remember that preceding the username you will need to place the user-id prefix. eg: pb_ = provider browser. For this example, the user would be created as: pb_headrom. User IDs are not case-sensitive.

Click **Add**; if a user already exists a message to this effect will be displayed. If the user does not exist, a screen will open in which further details relating to the new user can be added.

![Figure 2.5. Searching for an Existing User Account](image)

2.2.4. The User Details Screen

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

- **User Details** - identifying the user's group membership and their Account and Password policies
- **User Attributes** - specific user information relating to the groups to which he or she belongs

![Figure 2.6. The User Details Screen](image)

2.2.4.1. 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.
Select the user group(s) in the right hand panel by clicking on them, followed by the blue arrows to move your selection to the Member of panel on the left. Note multiple selections can be achieved by holding down the Ctrl key while clicking on each line. Group membership for the different user types are listed in the table below.

Once you have allocated the Group Membership click Save. This will load the correct fields for the User Attributes.

<table>
<thead>
<tr>
<th>UserID Prefix</th>
<th>User Type</th>
<th>Groups to add the User to</th>
</tr>
</thead>
<tbody>
<tr>
<td>pb_</td>
<td>Provider Browser</td>
<td>Users, Workflow Engine providers, NIR Provider Browsers</td>
</tr>
<tr>
<td>de_</td>
<td>Data Enterer</td>
<td>Users, Workflow Engine Data Enterers</td>
</tr>
<tr>
<td>nvp_</td>
<td>Non-Vaccinating provider</td>
<td>Users, NIR Non-Vaccinating provider</td>
</tr>
<tr>
<td>irb_</td>
<td>Identifiable Reports Browser</td>
<td>Users, NIR Identifiable Reports</td>
</tr>
<tr>
<td>nirb_</td>
<td>Non-identifiable Reports Browser</td>
<td>Users, NIR Non-Identifiable Reports</td>
</tr>
<tr>
<td>sqb_</td>
<td>Status Query Browser</td>
<td>Users, NIR Status Query</td>
</tr>
<tr>
<td>mdip_</td>
<td>MDIP Data Enterer</td>
<td>Users, Data Enterer - MDIP, Workflow Engine administrators, Workflow Engine users, NIR National administrator</td>
</tr>
<tr>
<td>mvs_</td>
<td>MVS Data Management</td>
<td>Users, Workflow Engine Users, NIR Status Query, NIR Non-Identifiable Reports, NIR Identifiable Reports, MVS Data Management &amp; CARM</td>
</tr>
</tbody>
</table>

Table 2.5. Group Membership for the different User Types

2.2.4.2. Account Policy

A user’s Account and Password policies will typically follow the NIR standards, as shown below. Alternative policies (if they exist) are available from the drop-down lists.

Click the Configure button corresponding to the Account Policy to edit its configuration details.
Account Disabled | Check the box if you want to disable an account. Saving the change will result in the User being denied access to the system
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 the box and select the number of times a user can log in before their account becomes disabled. The Logins Remaining figure is dynamic and decreases with each log in, displaying how many more times the user can log in

| Table 2.6. Account Policy Options |

2.2.4.3. Password Policy

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

| New Password | Enter new password must be at least 6 characters and can include letters (case sensitive), numbers and special characters
| Confirm | Repeat the new password to confirm choice
| Force Password Change | If selected, 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

| Table 2.7. Password Options |

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

2.2.5. User Attributes

The NIR will create 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; for example the Provider Browser attributes below include the user’s provider ID number and the name of the organisation which issued it.

The user attribute fields are as follows:
<table>
<thead>
<tr>
<th><strong>Description</strong></th>
<th>Description of the User Role and Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email</strong></td>
<td>User’s Email address for contact purposes</td>
</tr>
<tr>
<td><strong>Full Name</strong></td>
<td>Full Name of user in first name, family name order</td>
</tr>
<tr>
<td><strong>DHB</strong></td>
<td>The District Health Board the user is aligned with</td>
</tr>
<tr>
<td><strong>DHB Description</strong></td>
<td>This is the DHB’s display value rather than its coded value</td>
</tr>
<tr>
<td><strong>WE Provider ID</strong></td>
<td>Workflow Engine Provider details. Same values as used in the NIR Provider Details screen. Provider Registration number</td>
</tr>
<tr>
<td><strong>WE Provider Namespace</strong></td>
<td>The identification type of the provider, typically NZ Medical Council (NZMC) or New Zealand Nurses council (NZNC)</td>
</tr>
</tbody>
</table>

Table 2.8. User Attribute Fields

Once all attributes, group membership and account/password details have been entered and checked, click **Save&Close** to close User Details and return to the User Search screen. The new account is now ready for use, or any changes made to an existing account are now in effect.
3.1. The Administrator’s Role

3.1.1. Overview

The National Immunisation Register System provides the following functionality to DHB administrators:

- Correcting incoming messages from PMS systems. This is a critical task for all administrators because it ensures that an individual’s immunisation records are kept up-to-date.
- Search for an individual’s record within the NIR, ability to edit or update contact or other demographic details as required.
- Display and update the list of programmes an individual is registered on. View and amend the list of providers associated with the individual in each programme group.
- View the Current (due and overdue only) and Full (all) Task Lists for an individual. 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.

3.2. Icons and Buttons

3.2.1. NIR Icons

There are a number of icons used to carry out common tasks within the NIR System:
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Patient Details" /></td>
<td>Opens the Individual Details screen, where the individual’s contact, name and ethnicity details, along with caregiver information if appropriate, can be viewed and/or edited</td>
</tr>
<tr>
<td><img src="image" alt="Medical Details" /></td>
<td>Opens the individual’s Medical Details screen, where the individual’s enrolled programmes, nominated providers and enrolment status can be viewed</td>
</tr>
<tr>
<td><img src="image" alt="Full Task" /></td>
<td>Opens the individual’s Full Task List, which shows the individual’s scheduled, completed and historical tasks</td>
</tr>
<tr>
<td><img src="image" alt="Current Task" /></td>
<td>Opens the individual’s Current Task List, which shows the individual’s currently due and overdue tasks</td>
</tr>
<tr>
<td><img src="image" alt="Merge" /></td>
<td>Opens the Merge screen, which displays all records that have been merged with the primary record, by NHI and name</td>
</tr>
<tr>
<td><img src="image" alt="Notes" /></td>
<td>Opens a screen listing the individual’s notes (for example: Follow-up and Parent/Guardian notes) entered by an administrator</td>
</tr>
<tr>
<td><img src="image" alt="Activity Summary" /></td>
<td>Opens a screen displaying the individual’s immunisation history in a table</td>
</tr>
<tr>
<td><img src="image" alt="Status Query" /></td>
<td>Performs a Status Query search for a named individual</td>
</tr>
<tr>
<td><img src="image" alt="Individual Search" /></td>
<td>Locate the medical record of an individual associated with your DHB</td>
</tr>
<tr>
<td><img src="image" alt="Provider Search" /></td>
<td>Locate the details of a provider associated with your DHB</td>
</tr>
<tr>
<td><img src="image" alt="Clinic Search" /></td>
<td>Locate the details of a clinic associated with one or more of the providers in your DHB</td>
</tr>
</tbody>
</table>

Table 3.1. NIR-Specific Icons

### 3.2.2. Concerto Icons

There are a number of icons used to carry out common tasks within Concerto and the NIR:
<table>
<thead>
<tr>
<th></th>
<th><strong>Search</strong> Icon - opens a search dialog (e.g. pop-up vaccinator search on Task Details Screen for provider/clinic association)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Add</strong> Icon - click to add specified information (determined by field) to a record. E.g. Add contact information to an individual’s record</td>
</tr>
<tr>
<td></td>
<td><strong>Delete</strong> Icon - click to delete the data associated with this icon</td>
</tr>
<tr>
<td></td>
<td><strong>Select</strong> Icon - takes the user down to next level e.g. From full task screen to actual task for editing purposes</td>
</tr>
<tr>
<td></td>
<td><strong>Contract</strong> Icon - click to hide the content of an expandable item, such as an individual’s Caregiver Details</td>
</tr>
<tr>
<td></td>
<td><strong>Expand</strong> Icon - click to display the content of an item, showing additional data</td>
</tr>
<tr>
<td></td>
<td><strong>Auto-hide</strong> icon - in this configuration the NIR menu bar is anchored to the left screen margin. Click to float the menu bar and provide more screen space for viewing an individual’s details</td>
</tr>
<tr>
<td></td>
<td><strong>Auto-hide</strong> icon - in this configuration the NIR menu bar is free-floating and can be displayed or hidden by moving the mouse pointer towards or away from the left screen margin. Click to anchor the menu bar</td>
</tr>
<tr>
<td></td>
<td><strong>Concurrency</strong> icon - identifies when other vaccine has been given at the same time as a MeNZB vaccination</td>
</tr>
<tr>
<td></td>
<td><strong>AEFI</strong> icon - identifies the presence of an Adverse Effect Following Immunisation</td>
</tr>
<tr>
<td></td>
<td><strong>Document</strong> icon - indicates the presence of further information relating to the associated event</td>
</tr>
<tr>
<td></td>
<td><strong>Calendar</strong> icon - click to display a Calendar</td>
</tr>
</tbody>
</table>

*Table 3.2. Other Icons*

### 3.2.3. Buttons

There are a number of buttons which provide access to common actions:
Table 3.3. Navigation Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Click to save any changes that you have made. The Submit button has the same function as Save.</td>
</tr>
<tr>
<td>Save&amp;Close</td>
<td>Click to return to the previous screen and save any changes that you have made</td>
</tr>
<tr>
<td>Print</td>
<td>Click to print the current screen information so that you have a paper copy of it. If this button is labelled Printable, the NIR will reformat the screen into a form more suitable for printing, then will open a standard Windows screen from which the information may be printed</td>
</tr>
<tr>
<td>Add</td>
<td>Click to add an item based on the information that you have entered</td>
</tr>
<tr>
<td>Search</td>
<td>Click to initialise a search based on the search criteria that you have entered</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click to cancel the current action</td>
</tr>
<tr>
<td>Reset</td>
<td>Click to clear the screen and reset it to its default contents</td>
</tr>
<tr>
<td>Show</td>
<td>Click to refresh the screen and show updated</td>
</tr>
<tr>
<td>&gt;&gt;</td>
<td>Click to display to the next results screen</td>
</tr>
<tr>
<td>&lt;&lt;</td>
<td>Click to display the previous results screen</td>
</tr>
<tr>
<td>Printable</td>
<td>Click to generate and view a version of the current information formatted for printing</td>
</tr>
<tr>
<td>History</td>
<td>Click to view a list of past changes to an individual’s name, address and other contact details</td>
</tr>
<tr>
<td>Submit</td>
<td>Click to send the entered information (such as task completion details) to the NIR</td>
</tr>
</tbody>
</table>

**3.3. Searching for an Individual’s Record**

**3.3.1. Accessing the Individual Search Screen**

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 Options](image)

Figure 3.1. Individual Search Options

Note that a DHB administrator can only search for individuals associated with his or her DHB; as a result the DHB field is read-only. The medical records of individuals associated with other DHBs can be located by a Status Query search.
3.3.2. The Individual Search Screen

The Individual Search screen includes the following criteria:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHI</td>
<td>The National Health Index number - unique to every patient. If entered, no other criteria need be specified</td>
</tr>
<tr>
<td>Name</td>
<td>The individual's name. The name can be entered as either Familyname, Firstname or Firstname Familyname</td>
</tr>
<tr>
<td>Programme</td>
<td>The search returns individuals registered on the selected programme</td>
</tr>
<tr>
<td>DHB</td>
<td>A read-only view of the DHB with which the DHB administrator is associated</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>The individual's date of birth, in the dd/mm/yyyy format. You can either type the date directly into the field, or use the Calendar icon. Note there is a small green tick at end of this field. This icon changes to a red 'No Entry' icon if an incorrect date format is entered</td>
</tr>
<tr>
<td>Place of Birth</td>
<td>Click the Search icon to locate the individual’s place of birth and associated domicile code. Click Reset to clear this field</td>
</tr>
<tr>
<td>Age Range</td>
<td>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</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender of the individual. The possible values are Male, Female, Indeterminate and Unknown. If gender is not specified, all individuals regardless of gender will be returned</td>
</tr>
<tr>
<td>Database Status</td>
<td>The individual's Status in the NIR System. The default status is blank (return all statuses) with other options: Active, Inactive, Deceased, Opt-off, Overseas, Provisional Opt-off and Deceased Unconfirmed</td>
</tr>
</tbody>
</table>

Table 3.4. Individual Search Options

3.3.3. Favourite Searches

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

![Figure 3.2. Favourite Searches](image)

Selecting a previously created Favourite Search immediately lists the matching individuals. Add new favourites, or remove existing ones, by clicking the corresponding Add or Delete icons.

3.3.4. Carrying out the Search

When performing an Individual Search, the returned results will only include individuals associated with the DHB of the logged-in user. This contrasts with a Status Query search, in which the returned individual could be associated with any DHB.
Enter the criteria you wish to use and click Search to return the results. These will be displayed in the Search Results panel.

Figure 3.3. Individual Search Results

Ten names are 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.

The Search Results are displayed in a number of 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 outlined below:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHI</td>
<td>The individual's NHI number</td>
</tr>
<tr>
<td>Name</td>
<td>The individual’s name (last name appears first)</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>The individual’s date of birth, in the dd/mm/yyyy format</td>
</tr>
<tr>
<td>Address</td>
<td>The individual’s current address</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender of the individual. The possible values are Male, Female or Unknown</td>
</tr>
<tr>
<td>Print</td>
<td>The search results can be printed out in a simple spreadsheet format</td>
</tr>
</tbody>
</table>

Table 3.5. Search Results

If a broader search still returns 'No Results Found', the Status Query Search is available to extend your search beyond the NIR to the NHI Database. This search option is described in the following chapter.

Printing the Results

- **Printer friendly version** - click to import the results into Adobe Acrobat 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™

3.4. The Individual Details Screen

3.4.1. Accessing the Individual Details Screen

There are two ways an Individual Details screen can be displayed:

- from the results of a search - click the Individual Details icon corresponding to an individual to view his or her details
- from the Context Menu - when an individual has already been found and selected, the Individual Details icon is present in the Context Bar at the top of the screen; click this icon to view his or her details. The view will switch from whatever screen is displayed (Medical Details, Full or Current Task Lists) to the Individual Details screen
3.4.2. The Individual Details Screen

Note: Providers will only be able to open details for individuals they have been aligned with, either as a 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 using the Status Query process - see the following chapter for further information.

The Individual Details screen displays demographic and contact details for the individual and allows these details to be edited where appropriate. The general information section at the top of the screen contains all of the basic information about the individual, such as name, date of birth, gender and District Health Board association. Fields marked on this screen 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 divided into a number of sections, each of which is described below:

3.4.3. Identification

The general information section contains basic demographic details of the individual, including name, age and gender.

<table>
<thead>
<tr>
<th>NHI</th>
<th>National Health Index number of the individual – this is used as the unique identifier on NIR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Includes the individual’s title, Family name and first, second and third names</td>
</tr>
<tr>
<td>Alias Name</td>
<td>Other names by which the individual is known. For example, an individual’s maiden name or alternative first name(s)</td>
</tr>
</tbody>
</table>

Table 3.6. Identification Details

To add an Alias for an individual, enter the details in the Alias Name section. Type the individual’s alternative name details into the appropriate fields and click the Add icon.

Figure 3.4. The Patient Details Screen

Figure 3.5. Adding an Alias
To modify an Alias, click the individual’s alias with the right mouse button. Select Edit Row from the context menu and, in the resulting screen, enter your changes and click Save. An alias can be deleted in a similar way.

Figure 3.6. Editing/Deleting an Alias

3.4.4. Birth and Family

The Birth and Family section contains the individual’s date and place of birth, along with a number of other key details.

| Date of Birth | The individual’s date of birth |
| Place of Birth | The individual’s place of birth |
| Date of Death | The individual’s Date of Death (only enter when the individual’s death is known to have occurred). This action changes the individual’s status to Deceased and cancels all their scheduled tasks |
| Gender | The individual’s gender (Male, Female, Unknown, Indeterminate) |
| Marital Status | The individual’s marital status |
| Ethnicity | The individual’s ethnicity. Multiple ethnicities may be entered, with the first indicated ethnicity considered as the primary one |

Table 3.7. Birth and Family

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

Figure 3.7. Setting Place of birth

The field can be populated or updated by searching for the facility using the Search button (circled), which opens the pop-up search screen shown below:
3.4.5. Registration Status

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

<table>
<thead>
<tr>
<th>Status</th>
<th>The individual's current status in the NIR - see below for options. If the status is changed, an Effective Date and (optional) Reason fields become available for completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>DHB</td>
<td>The DHB the individual is associated with, based on their entered address. DHB administrators are able to change the DHB of individuals in their DHB only; this option is used when, for example, an individual moves to another DHB</td>
</tr>
<tr>
<td>Source of Record</td>
<td>This is a read-only field that is only populated for records migrated from Kidslink, and indicates which DHB they initially 'belonged' to</td>
</tr>
<tr>
<td>Registration Date</td>
<td>The date the individual was first registered with the NIR</td>
</tr>
<tr>
<td>Generate... letter</td>
<td><em>Generate Confirmation of Amendment to Registration on NIR letter</em> is an administrator only function. When an individual’s record is updated, the administrator can check this box, which causes the NIR to generate a letter for the individual or his or her parent/guardian to confirm the changes</td>
</tr>
</tbody>
</table>

Table 3.8. Registration Status Details

When an individual's status is changed to anything other than *Active*, all fields become read-only. The status change options are shown below:
Figure 3.9. Registration Status Changes

- **Change to Provisional Opt-off** – implication is that the individual (or guardian) does not want their immunisation events and demographic information recorded in the NIR. Selecting this option results in a **Confirmation of Opt Off** letter being generated. Change status to *Opt-off* when confirmation is received; only then will contact details be deleted. Opting-off is not available if a MeNZB vaccination has been given.

- **Change to Deceased Unconfirmed** – select to prevent immunisation overdue messages from being generated. Change to *Deceased* only when a Date of Death is confirmed.

- **Change to Overseas** – select when the individual is not available for continued programme participation. No task reminder messages generated and the individual’s status in all programmes changes to *On-hold*.

- **Change to Inactive** – implication is that the record has been created in error. The status of associated programmes is automatically changed to *Inactive*.

### 3.4.6. Alerts

The Alerts section contains details of any adverse reactions and/or contraindications for the individual.

<table>
<thead>
<tr>
<th>Label</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adverse Reaction</strong></td>
<td>This is a system-completed field which will be automatically selected when a task update records an adverse reaction.</td>
</tr>
<tr>
<td><strong>Contraindication</strong></td>
<td>This is a system-completed field which will be automatically selected when a task update records a contraindication.</td>
</tr>
<tr>
<td><strong>Alert Notes</strong></td>
<td>A free text area containing additional information relating to the individual’s adverse reactions or contraindications.</td>
</tr>
</tbody>
</table>

*Table 3.9. Alert Details*

The label text is displayed in Red as a visual alert if either checkbox in this panel is selected.

*Figure 3.10. Alert Details*

### 3.4.7. Contacts

To add contact details for an individual, select the **Contact Type** from the drop down menu. Possible values are Contact phone, Home email, Home fax, Home phone, Mobile phone, Other contact, Pager, Work email, Work fax, or Work phone.
Enter the details in the Contact Number field and click the Add icon. Contact details are edited and removed in a similar way as Aliases (see above).

### 3.4.8. Addresses

An individual must have a Current address, although other address types (Business, Mailing or Permanent) can also be specified. When entering or editing an address, be sure to specify the addresses Effective Date - the date at which the address or the change becomes active. Addresses are edited or deleted in a similar way to the individual’s Alias details - see above.

The current address is linked to a Geo-coding system that determines the DHB 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 an NIR DHB administrator for ongoing record maintenance and support.

As a result of the association with Geo-coding, entered addresses must represent actual, physical locations. To prevent errors, do not include abbreviations - for example, use ‘street’ rather than ‘st’. If an address is specified that is in a new suburb, for example, and is not recognised by the system, notify the individual’s DHB administrator who will in turn notify the Geo-coding company to request an update to their software.

### 3.4.9. Parent/Guardian

All individuals registered on the NIR up to the age of 16 are required to have parent/guardian details entered on the database. Selecting the Add icon associated with the parent/guardian’s name will expand the screen to display their contact details.
The NHI field for a parent/guardian is not required on the NIR. It is also not validated, so please ensure that if a parent/guardian’s NHI is known, that 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.

### 3.4.10. History

The History screen is accessed through the History button on the Individual Details screen. This screen records all updates completed either through the browser or messaging, and contains the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual NHI number</td>
<td>NHI number and date of birth of the selected individual</td>
</tr>
<tr>
<td>General Individual</td>
<td>Record of Name(s), Date of Birth and Gender updates</td>
</tr>
<tr>
<td>Details</td>
<td>Alias Name List</td>
</tr>
<tr>
<td></td>
<td>Record of Alias updates</td>
</tr>
<tr>
<td></td>
<td>Database Status</td>
</tr>
<tr>
<td></td>
<td>Displays record of Database Status changes, along with any reasons given</td>
</tr>
<tr>
<td></td>
<td>Contact List</td>
</tr>
<tr>
<td></td>
<td>Lists Contact Details updates (phone, fax, email addresses etc). This information, along with Address changes, is especially interesting to Outreach providers</td>
</tr>
<tr>
<td></td>
<td>Ethnicity List</td>
</tr>
<tr>
<td></td>
<td>Displays record of Database Status changes, along with any reasons given</td>
</tr>
<tr>
<td>Address List</td>
<td>All updates to Ethnicity for the individual</td>
</tr>
<tr>
<td></td>
<td>DHB Alignment History.</td>
</tr>
<tr>
<td></td>
<td>Place of Birth List</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Parent Guardian</td>
<td>Parent/Guardian Relationship, NHI and Primary status.</td>
</tr>
<tr>
<td>Parent Guardian Name</td>
<td>History of name changes by parent/guardian.</td>
</tr>
</tbody>
</table>

**Table 3.10. History Screen Fields**

The History Screen is Read-Only and is updated by changes saved in the Individual Details screen. Hovering the mouse pointer over any historical item displays a tool-tip 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.

### 3.5. The Medical Details Screen

#### 3.5.1. Accessing the Medical Details Screen

To access the Medical Details screen, carry out a search for an individual and click on their name in the Search Results panel. Click the Medical Details icon corresponding to their name.

If the individual has already been selected and their details appear in the context bar, click the Medical Details icon in the Context Menu to open the screen.
3.5.2. The Medical Details Screen

The Medical Details screen displays a list of the programme groups and programmes the individual is registered on along with their status history for each programme.

The screen is organised into grouped tabs, each of which lists the programmes associated with that group. In the above example, the **Immunisation** group lists the immunisation programmes the individual is associated with, along with his or her status in each one. The remaining tabs are:

- **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. See below for additional information

The Immunisation group lists the programmes the individual is currently enrolled in. Common to all programmes is the list of providers; this lists the providers associated with the individual and which one is to receive the update messages when an immunisation has been given to the individual by another provider. Provider roles and details can be viewed from this list.

Specific to each programme is the **Enrolment History**, which shows all enrolment status changes for each of the programmes the individual is associated with. The status change options are listed below:

- **Not Eligible** - use 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 en-rolled 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** – use when a child temporarily ceases their involvement with the programme. No update reminders will be generated. Status automatically reverts to Active if a task update message is received after the effective date, except for the 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** – use 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
- **Inactive** - normally set by the NIR system when an individual's status on the Individual Details screen is changed to **Deceased Unconfirmed**, **Deceased**, **Provisional Opt-off** or **Opt-Off**. This option can also be selected when a child wishes to opt-off a programme when he or she has one or more tasks in the MeNZB programme that have been completed. See below for more information

Opting Off when one or more MeNZB Tasks have been completed

---

Figure 3.14. The Medical Details Screen
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

![Figure 3.15. Opting Off When MeNZB Tasks have been completed](image)

4. Click OK. 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

![Figure 3.16. Opt Off Programme Status](image)

### 3.5.3. Provider List

The Providers section lists the providers associated with an individual enrolled in one or more programmes.

![Figure 3.17. Provider List](image)
Table 3.11. Providers Section Details

A provider can become 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.

3.5.4. Programme Section

This section shows the specific programme details for each programme that the individual has been registered on.

Figure 3.18. Programme List
Table 3.12. Programme Section Details

<table>
<thead>
<tr>
<th>Name</th>
<th>The name of the NIR programme. Clicking on the programme Icon opens the programme details in Programme Enrolment History section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created Date</td>
<td>The date the individual was registered on the programme. This field also displays the date of any status changes</td>
</tr>
<tr>
<td>Status</td>
<td>Shows the current and historical statuses of the individual on the programme. The current status is listed first</td>
</tr>
<tr>
<td>Created By</td>
<td>The username of the person who updated the information. This is populated automatically when an update is made</td>
</tr>
<tr>
<td>Reason / Comment</td>
<td>Displays any reasons/comments recorded at the time of the status update. An individual registered with Outreach, for example, will display the comment 'With Outreach'</td>
</tr>
</tbody>
</table>

If you wish to register an individual on a new programme, select the programme from the drop-down list and click the **Add** icon.

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 enrollment status in the programme to **withdrawn**.

### 3.5.5. 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**.

![Figure 3.19. Changing Programme Status](image)

Whenever an individual’s programme status is changed to **On Hold**, a reason must be given. From the drop-down options, 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.
Completing the above screen generates a reminder to the user that, once the status has been changed, the individual must now be registered with Outreach Services.

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.

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.
Figure 3.23. 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.

Figure 3.24. 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 then 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.

Figure 3.25. Status Change following Task Processing

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 statute to EOE (End of Episode). Click the Add icon to complete the change.

Figure 3.26. 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).

Figure 3.27. 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).

3.6. The Full Task List

3.6.1. Accessing the Full Task List

To access the Full Task List, carry out a search for an individual and click the Full Task List icon corresponding with their name in the Search Results panel. If the individual has already been selected and their details appear in the context bar, click the same icon in the Context Menu to open the screen.
3.6.2. The Full Task List Screen

The Full Task List in Table View lists all completed, current, overdue and future tasks for an individual in all of his or her active programmes. These tasks are automatically created, and their due dates automatically determined, by the NIR system at the time of enrollment. This activity takes into account both the New Zealand Immunisation Schedule and the individual’s age - resulting, for example, in an individual being scheduled for four MeNZB immunisations if he or she is under the age of six months, and three shots otherwise.

Tasks can be manually scheduled for an individual from the Full Task List. If, for example, an individual older than six months is likely to benefit from a fourth MeNZB immunisation, this task can be manually added to his or her list.

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 (have been due for longer than a trigger period - usually 4 weeks)
- **Blue** - tasks that will become due at some future date
- **Grey** - (only available when the Show All checkbox has been selected) tasks which have been deleted.

Deleting a task removes its processing status and resets it to being due on its originally scheduled date. Deleting a task, in other words, is used to correct the situation where a task is processed in error.

3.6.3. Filter Options Section

The filter options at the top of the Full Task List in Table view displays the criteria which can be used to limit the display of an individual’s tasks. All filter options are initially blank.
3.6.4. Task List Section

The Task List shows the details of an individual’s tasks, and provides access to the tasks for update.

<table>
<thead>
<tr>
<th>Programme</th>
<th>The name of the programme with which the task is associated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>The name of the task</td>
</tr>
<tr>
<td>Provider</td>
<td>The name of the provider who completed the task</td>
</tr>
<tr>
<td>Clinic</td>
<td>The name of the provider’s clinic where the task completion event occurred</td>
</tr>
<tr>
<td>Due</td>
<td>The date at which the task is or was due</td>
</tr>
<tr>
<td>Date Given</td>
<td>The date the task was processed (completed or declined)</td>
</tr>
<tr>
<td>Status</td>
<td>The task’s current status</td>
</tr>
<tr>
<td>Additional</td>
<td>Additional information relating to the task’s processing; for example: the reason given at the time a task was declined. A Flag icon may be present alongside any additional comments; clicking this flag opens a new screen displaying the full comment or other details relating to the processing of the task</td>
</tr>
</tbody>
</table>

Table 3.13. Task Details

One or more of the following icons may be associated with a task in either of the Full Task List’s Table or Tree view:
Remove the associated task's processing status, typically when a task has been selected in error. This action does not remove the task itself from the list; it would only revert its status to Due, Overdue or Future.

Select the task and open its processing screen.

Select to view the tasks processing history. This will show all update events for the task, along with any instances of when its processing status was deleted (see above).

Add a non-scheduled task to the list. This is required when a follow-up or booster immunisation is given, over and above what was scheduled for the individual at the time of programme enrolment. See below for additional details.

Table 3.14. Task Icons

An individual's Full Task List (in either view), may be printed by clicking the Printable button at the bottom of the screen. This action causes a preview of the list to be briefly displayed on screen, followed by the standard Print dialog, from which the printer and number of copies to be printed can be chosen.

3.6.5. 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 all tasks on the Full Task List with the Concurrency icon.

The presence of these icons is a visual warning that a MeNZB immunisation was given concurrently with other immunisations, and that a careful watch should be taken for adverse interactions.

3.6.6. Administrator Letters Group

The Administrator Letters Group tab on an individual’s Full Task List lists the 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.

Figure 3.32. Full Task List - Administrator Letters Group

Clicking the Document icon corresponding with a generated letter opens a preview of that letter.
3.6.7. Manually Adding a Task

Extra or non-scheduled task 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 example below 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.

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. For example, the indicator '6W' shows where the associated vaccine falls on the NZ Immunisation Schedule. A full list of indicators is given below:
Table 3.15. Task Indicators

### 3.6.8. 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:

- AEFIO - 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

### 3.6.9. 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.

![Figure 3.35. Recording AEFI](image)

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

3.7.1. Accessing the Current Task List

To access the Current Task List, carry out a search for an individual and click the Current Task List icon corresponding with their name in the Search Results panel.

If the individual has already been selected and their details appear in the context bar, click the same icon in the Context Menu to open the screen.

Figure 3.36. The Current Task List Screen - Tree view

An individual’s Current Task List can be displayed in Tree View (shown above - all due and overdue tasks for a selected programme) or Table View (all due and overdue tasks, regardless of programme). 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, for example, 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 specifically associated.

3.7.2. Processing a Task from the Current Task List

Processing a task begins with identifying the Status of the processed task. The options are Completed, Declined, Rescheduled or Closed.

When a task is Completed, the first step is to provide the date of completion - entered manually as dd/mm/yyyy, or select using the Calendar icon 📅. Immunisation related information must then be provided; note that the fields marked with an asterisk (*) are required and that the format for the Batch Expiry Date is yyyymm. Click Submit to send the entered information to the NIR - provided no required fields have been left blank.

Figure 3.37. Processing a Completed Task from the Current Task List - Tree View
When a task is Declined, the reason the individual (or his/her guardian) declined the immunisation must be provided. If the reason cannot be adequately identified by one of the drop-down choices, a free-text field is available and can be completed. The processing of a declined task is shown below.

![Image of a declined task](image1.png)

**Figure 3.38. Processing a Declined Task from the Current Task List**

Tasks may be Rescheduled when, for example, the individual is not available to receive an immunisation or is severely distressed and an immunisation is not practical. When Rescheduled is chosen, enter a new Due Date for the task, as well as a reason for the rescheduling. The processing of a rescheduled task is shown below.

![Image of a rescheduled task](image2.png)

**Figure 3.39. Processing a Rescheduled Task from the Current Task List**

A fourth task status option that may be available is Closed. The implication of choosing this option is that the task will never be completed because, for example, the immunisation was given in another country or because the immunisation schedule has changed and the task is no longer required. This option is only available to a National or DHB NIR administrator.

### 3.7.3. 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 task Status as Completed. In the Details drop-down list, select *Alternative Given*.

This action opens the dialog shown below, listing all the possible antigen components. The antigens which have been given or declined are individually identified through this dialog.
Figure 3.40. Antigen Components of a Vaccine

When this is done, two further tasks are created - one for the given components and the other for those that are declined. Process each task as normal to complete.

Figure 3.41. Alternative Given - Sub Tasks

The NIR system will check that all antigen components of a vaccine are accounted for when an alternative is given, as described above.

Manually entering an ‘Alternative Given’
Within the full task list screen, select the green arrow next to the jab that an alternative is being given for, enter the ‘completed date’, ‘status’ and then select within the ‘details’ = ‘alternative given’. A new screen will appear whereby you can enter details of the alternative given.

3.8. Individual Merge

3.8.1. When will Merging Individual Records be needed?

DHB administrators can merge records for individuals associated with their DHB only.

Under normal circumstances, all individuals coming into contact with the 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.

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 enrollment and registration status must be identical for the two records

3.8.2. Merging Two Or More Records

To access an Individual Merge screen, carry out a search for an individual of interest and locate their entry in the Search Results panel. Click the Individual Merge icon corresponding to their name. If the individual has already been selected and their details appear in the context bar, click the Individual Merge icon in the Context Menu to open the screen.

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 furthest up the alphabet the number is, the older it is likely to be. For example, ABC1122 is older than ABD1122 and DEA1093 is older than DEA1094. The oldest record is known as the primary record in the merge.

![Figure 3.42. The Individual Merge Screen](image)

The above example shows BAZ6435 - Melita Bowie - has been merged into AMS0915 - Mitchell Kersten - the primary record. A search from now on using either NHI number will return the same result: BAZ6427.

3.8.3. Merge Fields

| 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 |

Table 3.16. Merge Field Details

3.8.4. 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.

**Figure 3.43. Individual History following a Merge**

### 3.8.5. Reversing a Merge

When it has been determined that 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 into 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.

**Figure 3.44. 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’.

### 3.9. Activity Summary

#### 3.9.1. The Activity Summary Screen

An individual’s Activity Summary lists all their processed tasks, including immunisations (whether given or declined), generated letters and Outreach Services outcomes.
3.9.2. Filter Options Section

Filter options in the Activity Summary’s upper panel allow you to determine which activities are to be included in the summary display.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities From</td>
<td>The date of the oldest summary that you want to view in the dd/mm/yyyy format. You can either type the date directly into the field, or use the Calendar icon.</td>
</tr>
<tr>
<td>Activities To</td>
<td>The date of the most recent summary that you want to view in the dd/mm/yyyy format. You can either type the date directly into the field, or use the Calendar icon.</td>
</tr>
<tr>
<td>Summary / Page</td>
<td>Allows the user to select the number of activities to be included in the summary. The default is four but the drop down allows up to six to be displayed at once. Once a number has been selected, click <strong>Search</strong> to refresh the screen.</td>
</tr>
<tr>
<td>Group</td>
<td>This filter is not used by the NIR system</td>
</tr>
<tr>
<td>Order By</td>
<td>allows the user to select whether the activities are display in ascending or descending date order</td>
</tr>
</tbody>
</table>

Table 3.17. Activity Summary Filter Options

Click **Reset** to clear all filter settings. Remember that **Search** must be clicked to refresh the screen whenever new filter criteria are applied.

3.9.3. Activity Summary Section

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

- **Immunisation Group** tab - lists the processed tasks in the programmes in which the individual is enrolled
- **Administrator Letters Group** tab - lists the letters generated as part of the individual’s involvement in his or her programmes
- **Administrator Programme Group** tab - summarises the individual’s involvement with Outreach Services

![Activity Summary - Immunisation Group tab](image)

Figure 3.45. Activity Summary - Immunisation Group tab

All details, including the Batch Number and expiry Date, captured at the time the task was processed is 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 it to view the document’s contents.
3.10. Individual Notes

3.10.1. Accessing the Individual Notes Screen

To access the Individual Notes screen, carry out a search for an individual and click the Notes icon corresponding with their name in the Search Results panel.

If the individual has already been selected and their details appear in the context bar, click the same icon in the Context Menu to open the screen.

Figure 3.48. The Individual Notes Screen
An individual's notes are accessible to DHB administrators, but only if they are associated with their DHB. National administrators can view all notes, regardless of the DHB the individual is associated with.

### 3.10.2. Notes Fields

The Individual Notes screen is divided into eight sections:

- **Follow Up Notes** – relating to the individual's association with Outreach Services
- **Individual Notes** - additional information relating to the individual; for example, additional contact details
- **Kidslink Notes** – information relating to the individual’s involvement in the Kidslink programme (Counties and Auckland DHB only)
- **Merge Notes** – information relating to merge requests and completions
- **Parent/Guardian Notes** – additional contact and/or caregiver information
- **Provider Notes** – changes or updates regarding the individual's providers
- **Programme Notes** – notes relating to programme registration(s) changes
- **Transfer Notes** – changes to DHB alignments

Each section is divided into four columns:

<table>
<thead>
<tr>
<th>Note</th>
<th>Note subject selected from drop down list.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Note Text</td>
<td>Text field for note entry. Once the note is added by clicking the plus icon it is loaded as text above the text entry box.</td>
</tr>
<tr>
<td>Date Recorded</td>
<td>The date the note was entered into NIR. This is generated by the NIR with today’s date.</td>
</tr>
<tr>
<td>Recorded By</td>
<td>The user id of the administrator entering the note.</td>
</tr>
</tbody>
</table>

*Table 3.18. Note Field Details*

Each note has a delete icon to the left of its note subject. Clicking on the icon will remove the note from the database. There is a print button at the bottom of the page, which prints out all note entries separated by note headers. The printed version does not include empty note sections.
4.1. Status Query Search

4.1.1. The Status Query Search Screen

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. Due and overdue tasks can be processed by clicking a link on the Status Query Results screen.

To access the Status Query Search screen, click the Status Query Search icon in the Searches menu.

Figure 4.1. The Status Query Search Screen

A Status Query search can return any individual, regardless of which DHB he or she is associated with, and regardless of the access level of the logged in user. The individual’s NHI number, or his/her name, age range and gender is required before a status query can be performed. These options are described below:
The individual’s 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 name, either in familyname, firstname or firstname familyname format. Partial searches are supported, and the search is not case-sensitive.

Name information must be entered in conjunction with Age and Gender data.

Wildcard Radio Button

If selected, partial name information can be specified. For example, entering rog shack will return the individual named Roger Shackleford. If two or more individuals are returned by a wildcard search, the user will need to repeat the search using either a specific NHI from the result list or use more refined search criteria.

Wildcard searches only operate for the NHI database, not the NIR.

Soundex Radio Button

If selected, full name information must be provided. However, the system will return results which 'sound like' the entered criteria; for example a search using Philips will return both Philips and Phillips.

Wildcard searches only operate for the NHI database, not the NIR.

Age Range

The upper and lower limits (in years) within which the individual’s age lies.

Gender

The individual’s gender or sex. Use either Indeterminate or Unknown when this information is not available.

Table 4.1. Status Query Search Screen

4.1.2. 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 database 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 below illustrates an extended NHI Status Query search,

4.1.3. Status Query Results

The Status Query tool returns a successful search as a report. An example is displayed below; it details the individual’s vaccination record along with basic demographic and provider information plus any tasks due within the next four weeks. The individual’s current NIR status and his or her registered programmes are also listed.

This information is designed to assist in making decisions with regard to planned vaccinations for the individual.
When the logged in user is a DHB administrator, the following buttons are available:

- **Print** - opens a 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. This screen is described in a following section

### 4.1.4. No NIR Record Found

A warning is displayed on the status query results for individuals who do not exist on the NIR and whose information is pulled from the NHI, with an example shown below:
If an individual has details on the NHI, but not on the NIR, the status query will display details but no immunization information. The purpose of the above message is to ensure that national administrators know the source of the information they are viewing; from the NIR or the NHI alone.

4.1.5. 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 screen, as shown below.

![Status Query Report for: Test Testing](image)

**Figure 4.4. Status Query Showing Reason for Status Change**

4.1.6. The Open Record Screen

Clicking Open Record opens the Individual Details screen shown below. See Section 3.4.1, “Accessing the Individual Details Screen” for more information.

![The Open Record Screen](image)

**Figure 4.5. The Open Record Screen**

Once this record has been saved, the associated patient is placed in context and the remaining NIR screens become available.
4.2. Providers Search

4.2.1. The Providers Search Screen

The Providers Search screen is used by DHB administrators to maintain the list of providers associated with clinics physically located in their DHB. If a DHB administrator selects a provider who is not associated with at least one clinic in his or her DHB, that provider's record will be returned read-only.

The Provider Search Options are shown below and described in the following table.

![Figure 4.6. Providers Search Criteria](image)

<table>
<thead>
<tr>
<th>Provider Identifier</th>
<th>A value associated with a provider which, in conjunction with the ID Type, uniquely identifies him or her</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID Type</td>
<td>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)</td>
</tr>
<tr>
<td>Provider Name</td>
<td>The provider's family name</td>
</tr>
<tr>
<td>HMS Mailbox</td>
<td>The electronic mailbox through which the provider electronically sends or receives NIR related messages</td>
</tr>
<tr>
<td>Clinic</td>
<td>The name of the clinic associated with the provider. Each provider may, however, be associated with many clinics</td>
</tr>
<tr>
<td>Provider Application</td>
<td>The name of the application used by the provider in his or her clinic to view and enter individual information</td>
</tr>
<tr>
<td>Default Provider Role</td>
<td>Identifies the typical relationship between the provider and the individuals he or she is associated with.</td>
</tr>
<tr>
<td>Status</td>
<td>Identifies the provider’s Status in the NIR System. Inactive providers are not able to exchange messages with the NIR System</td>
</tr>
</tbody>
</table>

Table 4.2. Providers Search Criteria

4.2.2. The Provider Search Results

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.
Figure 4.7. Providers Search Results

Note that separate lines are returned for providers associated with more than one clinic. The columns in the Results display match the search criteria; see the previous table for an explanation of their contents. One additional column is displayed:

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

Table 4.3. Providers Search Results

Printing the Results

- **Printer friendly version** - click to import the results into Adobe Acrobat 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™

4.2.3. Provider Details

A provider’s status, associated clinics and programme details are shown on the **Provider Details** screen.

Figure 4.8. The Provider Details Screen

All information on this screen, with the exception of the provider’s identification details, can be edited by a DHB administrator but only if that provider is associated with at least one clinic in the administrator’s DHB. The NIR National Administrator is able to change a provider’s **Provider ID** value.

Provider Roles

Changes to a provider’s role will affect many other screens. For example 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 following 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:

- 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 the 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:

![Warning message](image)

*Figure 4.9. Changing a Provider’s Status when he or she has Associated Individuals*

The administrator will need to visit 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 search. This is fully described in the following section.

**Editing 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.

4.2.4. Adding a Provider

To create a provider, open Provider Search.

![Provider Search interface](image)

Figure 4.10. Adding a Provider

Only the highlighted fields need information; then this has been provided, click Add.

| Provider Identifier | The person’s Medical Council or Nursing Council number. Note: Nurses numbers are now 6 digits but for a practice nurse the PMS may have them entered with variations. Older numbers can have a letter with them or even be 5 digits. It is important in the NIR that we have the doctors/nurses numbers entered as they use it in their PMS rather than what is on their practicing certificate. So if their identifier is 1234 but it is entered on their PMS as 01234, we need 01234 entered at the NIR end. The important thing to check when you go back to do a final check at the practice level is that the number you put in NIR for that person is exactly the same as in their PMS. DO NOT CHANGE THE NUMBER IN THEIR PMS. Use the number set up against them in their PMS to identify them on NIR. (A suggestion: on the AUA when you send it to your clinics for the initial set up – next to the area where they place their Registration number write ‘as per what is on PMS’ so that the number they supply you is correct in the first instance). |
| ID Type | Select NZMC or NZNC |

Table 4.4. Adding a Provider

The following screen will appear:
4.2.4. Adding a Provider

**Figure 4.11. New Provider Details**

The first task is to select one or more roles for the provider:

**Figure 4.12. Role Selection for a New Provider**
Roles
For a GP, select • GP • Immunisation Provider (happens automatically) • Vaccinator

For a 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.

For SBVS: SBVS Team Leaders select “Immunisation Providers” and “Vaccinators”
For SBVS Vaccinators, set them up as BOTH “Vaccinators” and ‘Immunisation Providers’.

For an LMC: Select ‘Lead Maternity Caregiver’ When setting up an LMC ask them if they ever give vaccinations eg: HBIG and HepB-Paed at birth, if they have then they also need to be loaded as an ‘Immunisation Provider’ and ‘Vaccinator’.

Status
Active or Inactive. When you create a new provider select ‘Active’.

Effective Date
The date the record is created or changed

Name Title
Select “nurse”, “doctor” etc as appropriate

Name Family Name
Surname. (Please note if setting up a ‘Vaccinator’ and the name has brackets (ie: if they had a maiden name) it will cause errors, however once SP45 is released (4 April) will no longer cause issues with brackets in the name).

Name First Name
Use name rather than initial e.g. Dianna rather than D

Alias
Alias is helpful if you have a provider that is known by another surname. If you were to do a search on either name both variances would be returned. Alias is optional.

Clinic
Press the red icon to bring up the list of practices. Then enter the clinic identifier at the top and press search (you can enter the clinic name and do a search, however by putting in the clinic ID this avoids confusion with similar clinic names). The clinic will then appear on one highlighted line. Left click on this clinic and this will bring you back to the provider detail screen. Press + to attach the clinic to the provider.

Programme Notification
Select • Childhood immunisation • MeNZB • Pneumococcal • Hep B • BCG • Wellchild (at this stage only CMDHB use this option) • Only load ‘outreach immunisation services’ for outreach clinics or providers • “letters”’ (not necessary)

Task Notification
The NIR defaults to all these ticked The GP may not want to receive messages but unless you check these, the nurses in the practice won’t get the messages. Often only the nurses want the messages, but because the GP is the responsible provider for the individual, the messages are received into the Providers (GP’s) inbox, not the nurses (if she has one).

Overdue Notification
The PMS’s all have overdue worklist/reports in their PMS’s and are happy to manage their own overdues. The NIR has the facility to send overdue messages to the Provider’s inbox as a reminder if they desire.

Table 4.5. Adding Provider Details

Overdue messages/reminders

The Individual is linked to the Provider and then the clinic. The NIR doesn’t have a “true” association of the individual linked to the Vaccinator. The Vaccinator is recorded for the individual for the particular immunisation event. All messages etc are sent to the Nominated Provider, not the Vaccinator.

Note that while you can change some details once loaded, you cannot change the ‘Provider Identifier’ or the ‘ID Type’ – so double check all is correct before hitting the ‘SAVE’ button.
IMPORTANT: When visiting your clinics remind them that when they are entering immunisations in their PMS, that they ensure that the fields PROVIDER and VACCINATOR in their PMS systems contain the correct information.

The PROVIDER field is intended as the medical professional who is clinically responsible for the individual - this is usually the GP. Some of the PMSs default this field with the logged-on User, when this logged-on user is a GP (as loaded in the NIR) then there is no problem. When the logged-on user is the vaccinator, their ID appears in this field which causes a problem in the NIR - resulting in an Invalid Provider alert. So the vaccinator needs to ensure if they are logged in that the Provider details are put in this field – otherwise errors will occur.

To run a list of Providers in the NIR for each Clinic

1. Go to Provider Search
2. Filter on each clinic
3. Select Printer friendly version and an Adobe Acrobat™ (PDF) document will be created. Alternatively, copy and paste the initial selection into Microsoft Excel™
4. Repeat for each clinic

4.3. Clinic Search

4.3.1. The Clinic Search Screen

The Clinic Search screen is used by DHB administrators to maintain the list of clinics associated with providers involved with the National Immunisation Register. DHB administrators can search for clinics regardless of where they are located, but if one is selected that is not physically present with the DHB boundaries, its details will be read-only.

The Clinic Search Options are shown below and described in the following table.

![Clinic Search Filter Criteria](image)

**Figure 4.13. Clinic Search Filter Criteria**

<table>
<thead>
<tr>
<th>Clinic Identifier</th>
<th>The clinic's Health Facility code (HFC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic Name</td>
<td>The clinic's name</td>
</tr>
<tr>
<td>Mailbox Type</td>
<td>Identifies how the clinic will be sending and receiving messages</td>
</tr>
<tr>
<td>Mailbox</td>
<td>Either the clinic's fax number (with area code) or their HealthLink EDI account</td>
</tr>
<tr>
<td>Provider Application</td>
<td>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</td>
</tr>
<tr>
<td>Clinic Type</td>
<td>Identifies the primary role of the clinic - typically Private Practice. For SBVS, select School</td>
</tr>
<tr>
<td>DHB</td>
<td>Identifies the District Health Board clinic is physically located in. This defaults to the current user's DHB, but can be changed to search for clinics in any, or all, DHBs</td>
</tr>
<tr>
<td>Status</td>
<td>Identifies the clinic's status in the NIR System. If the clinic is not Active, it will not be able to exchange messages with the NIR System and its details will be read-only if selected</td>
</tr>
</tbody>
</table>

**Table 4.6. Clinic Search Criteria**
4.3.2. The Clinic Search Results

The results of a clinic search is 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.

![Figure 4.14. Clinic Search Results](image)

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

Printing the Results

- **Printer friendly version** - click to import the results into Adobe Acrobat 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™

4.3.3. Clinic Details

Specific clinic details can be displayed by clicking anywhere on its row in the Search Results panel.

![Figure 4.15. Clinic Details](image)

All information on this screen, with the exception of the Clinic ID, can be edited by the National administrator, or by the DHB administrator provided the clinic is physically in his or her DHB. 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.

The NIR National Administrator is able to change a clinic’s **Clinic ID** value.

**Mailbox Type and Mailbox**

The clinic’s Mailbox Type will be either BLANK: for manual providers, FAX: for fax providers or HMS: for electronic sites. HMSoldmailbox: do not use. The clinic’s Mailbox will be either their Fax number
(with area code) for their EDI Account number. Check that the latter is correct otherwise the clinic will not be able to send or receive messages electronically. It is case sensitive.

**PHO (Primary Health Organisation)**

The PHO is a grouping of clinics for funding purposes. Each clinic may be associated with only one PHO. This field may not be applicable to all clinics.

**Independent Practitioner's Association**

This identifies a private clinic union or co-operative formed to facilitate purchasing or central government lobbying. This field is optional.

**Clinic Type**

When the clinic type is *School*, the school’s **Decile Rating** and **Roll History** can be specified. Otherwise these fields do not apply.

Edit a clinic’s **Address** and **Contact** details from the Context menu. After adding new details, remember to click the **Add** icon. If 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, make sure they are assigned the role of Outreach Immunisation Services.

### 4.3.4. Adding a Clinic

![Figure 4.16. Adding a New Clinic](image)

*Figure 4.16. Adding a New Clinic*
| 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. If your clinic starts with a ZERO ensure you put in a ZERO and not the Letter O |
| PHO | May not apply to an individual practice, use only if it does. Select the PHO from the pick list. This is used for reports to aggregate correctly to a PHO |
| Mailbox Type | Select: BLANK: for manual providers FAX: for fax providers HMS: for electronic sites HMSoldmailbox: do not use |
| Mailbox | If you have selected ‘HMS’ for electronic providers the HealthLink EDI account is populated here (always a maximum of 8 characters long). Please ensure it is correct (case sensitive) if it is set up in lowercase at the PMS end, ensure you set it up in the NIR in lowercase etc. When a message comes in from clinic the NIR matches the mailbox name in the message header to the mailbox name entered here. If a match is found the NIR loads the message – if no match is found it will error. If you have selected “FAX” as the ‘mailbox type’ then please put the fax number in here including the area code. Format: XX XXXXXXX. If manual provider leave this field blank. |
| Decile Rating | Will default to your DHB |
| Provider Application | Select application that provider uses. If your provider is a ‘Fax’ or a ‘Manual’ provider then please select the ‘Manual Provider’ from this pick list. |
| Status | Select ‘Active’ |
| Clinic Type | Select type of clinic. Most practices would be ‘private practices’ and SBVS would be ‘School’. For hospitals – select ‘Hospital’. When adding a hospital, ensure the ‘name’ and ‘mailbox’ fields are set to the exact name the clinic will supply in its extract files. |
| Independent Providers Association | Not Required |
| Contacts | Populate with phone and fax details. Important: remember to include the area code: Format: xx xxxxxxx If the provider is a ‘FAX’ provider very important to add the FAX number here under ‘Work Fax’. (If ‘work fax’ number not populated and they are a fax provider they will not receive fax). |

Table 4.7. Adding a New Clinic

When adding a hospital, ensure the name and mailbox fields are set to the exact name the clinic will supply in its extract files (you may need to contact the facility to confirm this information).

- Select Clinic type "hospital"
- Select Mailbox type "HMS"
- Create record as usual

Any providers that perform immunizations for HepB-Paed or HepBIG at the hospital must be aligned to the hospital in the system via the provider details screen.

Please Note: If you have the scenario where one of your clinics is a private practice and also provides outreach services just set up the clinic ONCE as above as a private practice. When creating the providers for that particular clinic make sure you also assign the role of ‘Outreach Immunisation Services’ to those providers that work at that clinic.
5. NIR Administration Tools

5.1. Overview

The NIR Administration Tools are collectively used to identify and correct messages received by the NIR system.

5.2. 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 the NIR System. The difference between the two categories is:

- **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 the Rhapsody Message Editor
- **Critical** - The message cannot be understood by system, as key information is missing or incorrect. These messages have to be corrected using the Rhapsody Message Editor (text editor). This facility is available only to the National administrator

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 below:
Figure 5.2. Errors and Criticlas - Filter

A typical message list is shown below. If more than 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 or to place the oldest messages at the top of the list, from where they can be dealt with first.

Figure 5.3. Errors and Criticlas - Results

Select any message by clicking on its row; the application appropriate for its correction will then open. Examples are shown on the following pages.

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.

When all else fails...

If a DHB Administrator sees a message they are unsure how to fix, please screenshot the item and forward it to nirsupport@moh.govt.nz.

A partial problem list is shown below; 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 – The Rhapsody Message Editor opens. The use of this tool is described on the following slides
- **Warning** and **Alert** messages – The Individual Details screen opens. Errors can normally be corrected on this screen or by switching to Medical Details. Working with these screens have been described in an earlier session

Deleting Messages with Errors

The **Errors and Criticals** list includes the ability to delete messages. This is needed as sometimes correcting a problem does not remove the offending message. The error shown below related to the fact that all providers have a unique identifier and code. If this is not the case in a message, that message will be placed onto the list below.
5.2. Errors and Criticals

Clicking the error message identifies where the error has occurred:

The provider’s correct identifier details can be found by carrying out a search using the **Provider Application** (**NextGen**) and HMS Mailbox (**otumoe**) information contained in the above message. If the information cannot be found, the message can be deleted. The administrator for the originating DHB would need to be informed of this action so that the problem can be investigated further.

**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.
Action: the 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 the NIR.

Action: contact the Provider who will provide the vaccinator’s details of the Vaccinator (via AUA form). Once this form has been received, create the Vaccinator on the NIR.

Important: Once you have set up the new vaccinator on the NIR, the existing error messages need to be fixed so that those details will flow through. To do that do the following:

Type the following in the above field: 117322:NZNC where 117322 is the provider ID and NZNC is the ID Type. The semi-colon must be included.
Address Details Incorrect Error

When address details are incorrect or incomplete, a valid GEO code cannot be generated.

Clicking the text of the error opens the Individual Details screen, followed by the Edit Address panel, as shown below.

Alongside the above panel, the following dialog is displayed which offers three options for correcting the error. Select as appropriate.

Typical error sources:

- 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; for example Southern Auckland should be just Auckland

**Action:** In the example above, the Town field contains ‘Southern Auckland’. This will (incorrectly) GEOcode to the Waikato DHB. Replace it with the correct information.

When the

**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.
Invalid Sending Facility Error

This error relates to the mailbox set-up used by the provider.

The provider’s mailbox is shown as hms.user.otahufam instead of otahufam.

Action: type otahufam and process the message. This removes the error and sends the individual’s details on to the NIR.

You still need to contact the provider because their mailbox configuration needs to be changed to remove the ‘hms.user.’. They will have to contact their PMS vendor if they do not know how to correct this.

Invalid Ethnicity Code Errors

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

Action: insert the correct ethnicity code into the message before resending it.
**Task Code: Indication Errors**

Occurs when the value of the 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. For example, 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.

<table>
<thead>
<tr>
<th>Code: Indication</th>
<th>Description</th>
<th>Coding System</th>
</tr>
</thead>
<tbody>
<tr>
<td>99002:1:5</td>
<td>MenNZB Dose 1</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:2:5</td>
<td>MenNZB Dose 2</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:3:5</td>
<td>MenNZB Dose 3</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:4:5</td>
<td>MenNZB Dose 4</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:1:6</td>
<td>Booster/Extra MenNZB Dose 1</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:2:6</td>
<td>Booster/Extra MenNZB Dose 2</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:3:6</td>
<td>Booster/Extra MenNZB Dose 3</td>
<td>NZVX</td>
</tr>
<tr>
<td>99002:4:6</td>
<td>Booster/Extra MenNZB Dose 4</td>
<td>NZVX</td>
</tr>
</tbody>
</table>

**Mailbox Not Recognised**

When a clinic’s electronic mailbox is not recognised by the NIR, messages cannot be accepted from or sent to that practice. Clicking the corresponding row opens Rhapsody - the application used by the NIR to manage message movement between the different system components.
Two options are available for correcting this problem:

- If the Mailbox account is known, enter it onto the screen and click **Process Message**. Be sure to follow this up by contacting either the clinic itself, or the DHB administrator for the DHB within which the clinic is located, and ensure they enter the correct mailbox account into their PMS (Patient Management System). Otherwise the error will reoccur every time a message is sent.

- If the Mailbox account is not known (or cannot be found), click **Delete Message**. 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 again opens Rhapsody, but with the only option to delete the message. Once this has been done, the originating clinic or responsible DHB administrator must be informed and asked to check all details and resend the message.

### 5.3. 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 the NIR System, still contained one or more mistakes that should be corrected. The difference between the two categories is:

- **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 below.
Figure 5.7. Warnings and Alerts - Filter

A typical message list is shown below. If more than 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.

Figure 5.8. Warnings and Alerts - Results

Typically, errors in this list are corrected by clicking the corresponding row which opens a relevant screen from which it may be corrected. See Section 3.4.1, “Accessing the Individual Details Screen” for assistance with this.

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 GEO code cannot be generated.

Figure 5.9. Incorrect Address Error
Typical error sources:

- spelling mistakes present
- commas present in the address
- suburb and town details not in the correct order
- town is not correctly identified; for example Southern Auckland should be just Auckland

Action: In the example above, the Town field contains 'Southern Auckland'. This will (incorrectly) GEOcode to the Waikato DHB. Replace it with the correct information.

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.
5.4. The Letter Task List

The Letter Task List is used to identify individuals on the National Immunisation Register who have one or more outstanding letters to be generated.

Enter the NHI or name of the patient 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 number of results to be returned and the date range within which the letter was generated.

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

Typically a National 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.

Results can be sorted by any column by clicking the column title; click the title a second time to reverse the sort.
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 rightmost column. Click the **Select All** button to select (or clear the selection) of all letters. Click the **Generate** button to generate the letter(s).

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

![Sample 'No Further Follow-Up' Letter](image)

**Figure 5.14. Sample ‘No Further Follow-Up’ Letter**

Clicking **Edit** opens the letter in a second screen with a number of included editing tools. Fonts and font sizes can be changed, or a table and/or graphic added to the letter.
Figure 5.15. Editing the 'No Further Follow-Up' 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 by attaching it to an email.

5.5. NIR DataMart

The NIR DataMart is a database of information extracted from the NIR on a weekly basis and used for national and district reporting. The reports from the DataMart contain non-identifiable data. All users who wish to have access to the NIR DataMart must complete a ‘NIR DataMart New User Request Form’ and have it approved by the national NIR administrator. This form may be obtained from http://bo.nzhis.govt.nz/.

NIR DataMart Extract

Selecting the DataMart Extract item under the Admin Tools menu displays the following screen, from which a DataMart extract for all or a specified DHB can be run. Note that an extract can take quite a while to produce results; please do NOT click the Run button repeatedly when nothing seems to be happening.
Figure 5.16. Performing an Extract for the DataMart

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.

Figure 5.17. DataMart Welcome Page
6.1. Overview

The purpose of the NIR 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, for example:

- increasing the level of public information in areas where immunisation rates are low
- locating individuals who need to be re-immunised following a problem with a vaccine
- identifying 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 **Generate**. 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 Report and the Vaccine List report.

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.

**The Reports Menu**

The Reports menu is shown below; notice the circled **Scroll** arrow at the bottom. This only appears if there are more menu items available that can be displayed at any one time; hover your mouse pointer over this arrow to scroll down (or up) the list.

![Figure 6.1. The Reports Menu](image)

6.2. The Birth Count Report

The **Birth Count** report includes a list of all individuals registered in one or more National Immunisation Register 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 no matter where they live now or later on, ignoring the
individual’s current DHB. Each Administrator in their respective DHB would be able to run this report for their own DHB to identify the number of children born in their DHB.

The filters include

- Place of Birth (ability to do it on individual place of birth, a selection, or all places of birth for that particular DHB). The ability to do the report on ‘all places of birth for that DHB’ - this would enable the Administrator at a particular DHB to run the report for ‘all places of birth’ for their particular DHB at ONE push of the button (instead of having to select the specific places of birth for their DHB)

- Date of Birth date range

![Figure 6.2. Birth List Filter](image)

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 clinics individually once they have been selected.

Once a clinic is selected, the child’s **Nominated Provider** and **Well Child Provider** can be selected. Both options are considered when the results are generated; in the above example, all children born between April 1, 2005 and July 27, 2006 who have either Richard Branson as their nominated provider or who do not have an assigned well child provider will be included in the report.

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

![Figure 6.3. The Birth List Report](image)

![Figure 6.4. DHB Registered Population Filter](image)

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

Click Generate to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.5. The Vaccination Volumes Report

The *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.

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 Acrobat Reader in a new window, from where it may be printed or saved to a specified location.

6.6. The Task Update Report

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

**Figure 6.10. Task Update Filter**

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

**Figure 6.11. The Task Update Report**

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

**Figure 6.13. The Cold Chain Failure Report**

### 6.8. The 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.

**Figure 6.14. Vaccine Recall Filter**
Click **Generate** to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.

**Figure 6.15. The Vaccine Recall Report**

### 6.9. The 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.

**Figure 6.16. Vaccine List 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 Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.10. 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.

Click Generate to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.11. 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.

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

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

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

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

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

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:

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

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**Figure 6.26. Vaccination by Coverage Filter**
Click **Generate** to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.

**Figure 6.27. The Vaccination by Coverage Report**

### 6.15. The 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.

**Figure 6.28. 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 Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.16. The 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 dropdown lists of options and click the Add icon. This can be repeated if multiple items are to be included in the report.

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

**Note**

Only NIR administrators who are members of the Well Child Overdue Report Concerto group will be able to access this report. See Section 2.2.4.1, “Group Membership” for more information.

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

**Note**

Only NIR administrators who are members of the Well Child Overdue Report Concerto group will be able to access this report. See Section 2.2.4.1, “Group Membership” for more information.

Click Generate to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
The Well Child Coverage report shows the number and percentage of individuals who have received their vaccinations. The only criteria for this report is the range of birth dates for included individuals.

**Note**

Only NIR administrators who are members of the Well Child Overdue Report Concerto group will be able to access this report. See Section 2.2.4.1, “Group Membership” for more information.

Click **Generate** to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.20. The 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 criteria for this report is the range of birth dates for included individuals.

**Note**

Only NIR administrators who are members of the Well Child Overdue Report Concerto group will be able to access this report. See Section 2.2.4.1, “Group Membership” for more information.

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

The NIR Birth Cohort & Childhood Immunisation: Children-Provider Status Summary Report identifies the number of children in a selected DHB who have, or do not have, a nominated provider. The only criteria for the report is the selection of the DHB.

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

6.22. The BC: Child - Provider Status Detailed Report

The NIR Birth Cohort & Childhood Immunisation: Children-Provider Status Detailed Report identifies the names of children in a selected DHB who have, or do not have, a nominated provider. The criteria for this report is the selection of the DHB and the Provider Status.

The NIR Birth Cohort & Childhood Immunisation: Children-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 criteria for the report is the selection of the DHB.

Figure 6.44. BC: Child-Nominated Provider Status Detailed Criteria

Click Generate to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
6.24. Associate Provider Summary Report

The Associate Provider Summary Report is a summary of all individuals associated with the listed provider who is in turn associated with one or more of the selected clinics. This report is similar to that of the OIS Referral Summary, however, this one will allow manipulation to the point of being able to select the clinic and the provider that you wish. This will allow for a report to be generated for any particular provider within any particular clinic, so that they may be advised of all the children that they have associated to them in the NIR.

This will be particularly useful for Manual Providers, including Well Child and LMC’s. 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 the NIR. Currently this is only available for OIS through the OIS reports and GPs through the Vaccine List Report. This report could also be used for many other tasks that an NIR Coordinator needs to do.

This report could also be used to share information that is on the NIR with Health Providers. The information that this report would give is basic information about the child only. No information about any other providers or immunisation events would be presented in this report.

The Report Search Filter would be the same as the OIS Referral Summary screen, however, instead of having the OIS Provider and a drop down box, you would have Provider and a search facility that would enable you to choose whomever you wished. The search could be made smaller by having the option to choose the role of the provider that you wish to produce the report for.

Click Generate to create the report using the specified filter conditions. The report is opened in Adobe Acrobat Reader in a new window, from where it may be printed or saved to a specified location.
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 to be able to provide the Well Child Providers with information about their patients and to help to share this information with all health providers. They are 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 who is associated with one or more individuals, these individuals can be selected from the Individuals drop-down list and added to the criteria.

Click **Generate** 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.
Figure 6.49. Associate Provider Detailed Report - top

The top half of the report lists the full demographic and contact details for the individual, along with their caregiver information. The lower half lists the individual’s associated providers and the programmes in which they are currently enrolled, along with details on all immunisations they have received.
6.26. 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 (blank criteria are not permitted) and click the **Generate** button to generate the results.

**Figure 6.51. Duplicate Dose Criteria**

The results are sorted by the NHI of the individuals who have been given one or more duplicate doses. Click another column title to sort by that column, and click a second time to reverse the sort. Click any entry to open the **Individual Details** screen for the corresponding person.
### Figure 6.52. Duplicate Dose Results

Click the *Printer friendly version* link to import the results into Adobe® Reader, from where it 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 then be loaded into Microsoft® Excel for further analysis.

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<th>Task</th>
<th>Number of Times Occurred</th>
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<td>MeNZB1</td>
<td>2</td>
</tr>
<tr>
<td>BHY2203</td>
<td>MeNZB2</td>
<td>2</td>
</tr>
<tr>
<td>IRYS769</td>
<td>MeNZB3</td>
<td>2</td>
</tr>
<tr>
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</tr>
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