

ClinicFlow User Guide

What is ClinicFlow?

ClinicFlow is a digital platform designed to modernize how health organizations use technology to promote better health in the populations they serve. It is an end-to-end immunization campaign management software that provides organizations with the digital tools required to efficiently run immunization clinics and campaigns, from virtual appointment booking, e-consent, health status screening prior to the appointment, through to clinical documentation and vaccination record delivery after the clinic visit. ClinicFlow is a seamless workflow for patients and ensures providers and administrators are up to date and in control of their immunization campaigns with real-time reporting and tracking.

Using this Guide

This guide is meant to provide an overview of the workflows required to use ClinicFlow, specifically targeted at appointment booking and management, and patient and immunization data management. These workflows are commonly used by Clinic Admins and Clinic Owners. This guide is broken into three parts:

Part 1: Getting Started	3
Onboarding End Users	4
Part 2: Launching your Campaign	6
Viewing Appointments	6
Booking Appointments	8
Managing Appointments	11
Accessing Reports	11
Part 3: Managing Patient and Immunization Data	12
Patient Info	12
Vaccinations	13
AEFI	16
Notes	17
Appointments	18
Cohorts	19
Forms	19
Admin	19

If you have questions or need support, please contact your Super Admin or the ClinicFlow support desk.

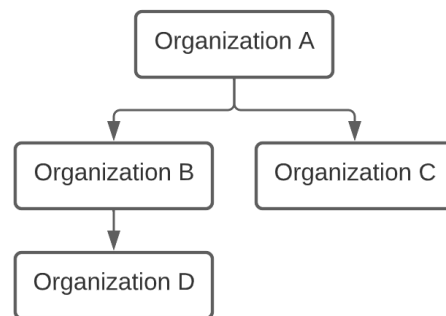
Part 1: Getting Started

Super Admins are responsible for setting up your system, including the Organizations, Services, Forms, and Clinics. Here's a brief overview of these terms in the context of ClinicFlow:

Organizations

Organizations are used to separate data and restrict data access to end users on a need-to-know basis by creating a hierarchical structure within ClinicFlow. A hierarchical structure of “parent” and “children” organizations can limit users to data within specific children organization(s). Users assigned to a parent organization will have access to data within that parent organization and all of the children organizations.

In the example below, Organization A is at the top of the hierarchy. Assigning user access to Organization A will give access to all data within Organizations A, B, C and D. Assigning a user to Organization C will give them access only to data within Organization C. Users can be assigned to multiple organizations on the same level of the hierarchy (e.g., Organization B and C).



Services

Services are used to define which clinic services (e.g., vaccinations, assessments) are being offered, including the applicable products and forms for each. Services are shown to the public on the booking page so they can easily select which vaccines they need to book and internally in ClinicMode to facilitate documentation.

Clinics

Clinics are the place to go for everything needed to set-up and run your clinical operations: the clinic name and location, schedule (which we call “Calendars”), and assign users to grant access to the clinic in ClinicMode.

Onboarding End Users

There are two types of users in ClinicFlow: Admin Console (“Console Users”) and ClinicMode (“Clinic Users”).

Onboarding Admin Console Users

Admin Console users are administrative users who will access the ClinicFlow Console to support clinical operations and/or nursing staff who are responsible for patient demographic and immunization administration.

Admin Console users are granted to an organization and are assigned a role.

- The organization they are assigned to controls the amount of data they will have access to.
- The role they are assigned will determine the features they have access to.

Granting Access to Console Users

Only Super Admins and Clinic Owners can grant and manage access to Console Users. To do so, navigate to the left-side menu to the **Users–Console Users** tab.

To create a new Console user, click the “+New User” button. For each user, define:

- **First Name:** Users first name.
- **Last Name:** Users last name.
- **Email:** Users email. This will be used to track their actions within ClinicFlow.
- **Roles:** This is a multi-select list (e.g., a user can have multiple roles) and will determine which features the user has access to. Roles that have been configured by CANImmunize for your organization will be displayed in the picklist.
- **Organizations:** This is a multi-select list. This will be used to determine which organizations and associated data they will have access to in the Console. You will only be able to grant users to organizations that you have permission to access yourself.
- **Password:** You must set a password. To avoid sending passwords to end-users, you can set a password and ask them to use the “Forgot Password” option on first-login to set their own password.
 - **Server Generated Password vs. Manually Set Password:** If you select server generated, a random 8-character password will be generated (and displayed for you to copy). Passwords must: be at least 8 characters; Include at least 3 of the following: lower case, upper case, number, special characters; and have no more than 2 identical characters in a row.

Existing users will display by first name, last name, and email; you can also filter the list based on account status (active vs. disabled; with disabled hidden by default).

Onboarding ClinicMode Users

ClinicMode is the tablet application (iOS and Android) used on the clinic floor. The app allows for a streamlined and efficient immunization appointment for the patient and immunizer, with all information available in one place.

Granting Access to ClinicMode Users

Super Admins, Clinic Owners and Clinic Admins can grant and manage access to ClinicMode Users. To do so, navigate to the left-side menu to the **Users–Clinic Users** tab.

To create a new ClinicMode user, click the “+New User” button. For each user, define:

- **First name:** Users first name.
- **Last name:** Users last name.
- **Email:** Users email. This will be used to track their actions within ClinicFlow.
 - **Note:** Users cannot have more than one account per email. If a user is required to be an active Immunizer *and* Greeter, two emails will be needed.
- **Role:** Select “Immunizer” or “Greeter”.
- **License Body:** Select from the picklist the most appropriate license body.
- **License Number:** Enter their license number; if they do not have one, can enter “N/A”.
- **Organization:** Select the organization that this ClinicMode user belongs to. Only users that have access to this organization will be able to manage this user in the future.
- **Approver:** This is for internal tracking purposes only.
- **Enable Clinic Access:** If enabled, the ClinicMode user will be given a password and will be able to login to ClinicMode. If disabled, a profile will still be created for them; this is useful when vaccinations are added within the Console since an Immunizer is always required to be attached to a vaccination. Clinic access can be activated/deactivated by clicking into the users profile at a later date.
 - If enabled, a password must be set. To avoid sending passwords to end-users, you can set a password and ask them to use the “Forgot Password” option on first-login to set their own password.
 - **Server Generated Password vs. Manually Set Password:** If you select server generated, a random 8-character password will be generated (and displayed for you to copy). Passwords need to be 8-characters and include: capital letter, number, and a symbol.

Existing users will display by first name, last name, email, license body, license number, organization, role, and clinic access; you can also filter the list based on clinic access (granted vs. denied; with denied hidden by default).

Assigning the ClinicMode user to a Clinic

Once a ClinicMode user has been created, they will be able to login but will not see any Clinics yet. You must assign the ClinicMode user to the appropriate clinic(s); this can be done in the **Clinic–Clinic Mode Users** tab:

- Click the “+Link Clinic Mode User” button.
- Search for the users by first name, last name, or license number.
- Add them to the clinic by clicking “Add to Clinic”.

Part 2: Launching your Campaign

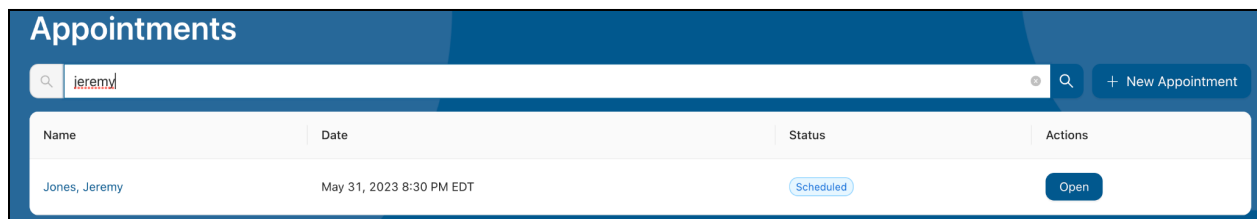
Once your system is configured, your clinics are scheduled, and your end-users are onboarded, you are ready to launch your campaign!

Viewing Appointments

During a live campaign, the **Appointments** tab is a useful spot to search, view, and schedule appointments for the public.

Appointment Search

Use the Appointment Search bar to search for an individual appointment by their first name, last name, email, or HCN.



Clicking “Open” will open the Appointment Details for the appointment and display additional information, such as comprehensive demographics, the clinic name and location, and if they completed any forms as part of their online booking. They will also be able to:

- Cancel the appointment,
- Resend the reminder email (if an email was provided at booking),
- Reschedule the appointment,
- Open the patient-facing Appointment Summary screening, and
- Book a new appointment
 - If the appointment was Canceled or Past (Unactioned), you can use this to reschedule without having to re-enter all the demographic information.

← **Jeremy Jones - May 31, 2023 8:30 PM - CANI ABC Test Clinic** Edit

Cancel Appointment
Send Reminder Email
Reschedule
Open Appointment Summary
Book Appointment

Patient

Date of Birth	April 4, 2021	Phone Number	(456) 454-6546
HCN		Email	jeremy@canimmunize.ca

Appointment Details

Patient	Jeremy Jones	Appointment Status	Scheduled
Appointment Date	May 31, 2023	Appointment Time	20:30 EDT (10 mins)
Clinic	CANI ABC Test Clinic	Calendar	ABC Cal 1
Location	CANI ABC Test Clinic Location	Created at	May 31, 2023 5:16 PM EDT

Services

Service	Forms Complete	Appointment Complete
2, 4, & 6 Months Routine Vaccinations	Yes	No

> Additional Information

Appointment Calendar

The calendar view allows you to select a date, clinic, and calendar to view appointments and availability over a month, week, or day. To see appointments, you must select a date and clinic. If you do not select a calendar, it will default to showing “All Calendars” that belong to that clinic. The timezone will default to the timezone set at the clinic.

When viewing the calendar, clinic availability is shown in light gray with booked appointments displayed in blue (scheduled) or green (completed).

Hovering over a booked appointment will display more details, including the Service booked. Clicking “View Appointment Details” will bring you to the Appointment Details screen.

The screenshot shows a vertical timeline of an appointment calendar. The time slots are labeled on the left: 6:30pm, 7pm, 7:30pm, 8pm, and 8:30pm. At the 8:30pm slot, there is a blue bar representing a booked appointment for 'Jeremy Jones'. A tooltip is displayed over this bar, containing the following information:

- Jeremy Jones**
- Services:** 2, 4, & 6 Months Routine Vaccinations
- First Name:** Jeremy
- Last Name:** Jones
- View Appointment Details** (button)

The 8:30pm slot in the calendar is highlighted in blue, indicating a booked appointment.

Booking Appointments

To book an appointment, navigate to the booking page. You will first be required to enter the date of birth for the patient you are booking, followed by the service(s). Services can have additional information, which can be viewed when clicking “Select”:

Select Service(s) and Review Eligibility

Please enter the information for the person you are booking an appointment for, exactly as it appears on their health card. **Changing the date of birth will restart your booking process.**

Date of Birth:

Month: Day: Year:

Select all the services you want to book an appointment for:

Vaccine History Assessment

The Vaccine History Assessment appointment is so that you and your child can have more time to speak to the clinician who will administer the vaccine, because:

- You are unsure which vaccine your child is due for.
- You do not have your child's Yellow Card.
- You recently moved to Ontario from a different province, territory, or from another country.

Your child may be able to receive the vaccine(s) after the clinician has assessed their vaccine history.

[Close](#) [Confirm](#)

2, 4, & 6 Months Routine Vaccinations [Select](#)

12, 15 & 18 Months Routine Vaccinations [Select](#)

4-6 Years Routine Vaccination [Select](#)

Grade 7 School Vaccination [Select](#)

Once all services have been selected, click “Continue to Booking”. A list of available clinics will then show. Clicking into a clinic will show the available appointment times:

Find Appointment

Filters: Select Date Show clinics with no availability

South-East Ottawa CHC (EN & FR) 🕒 Earliest Availability: Thursday, June 1, 2023

1355 Bank Street Suite 700, Ottawa, K1H 8K7 | 613-737-6115 ext. 3535 | EN & FR [Change](#)

Services: Vaccine History Assessment

Thursday, June 1

Appointment times are shown in EDT.

9:00am 9:15am 9:30am 9:45am 10:00am 10:15am 10:30am 10:45am 11:00am 11:15am 11:30am 11:45am 12:00pm 12:15pm

12:30pm 12:45pm 1:00pm 1:15pm 1:30pm 1:45pm 2:00pm 2:15pm 2:30pm 2:45pm 3:00pm 3:15pm

[View More Availabilities](#)

After choosing an appointment time, you will be prompted to fill in the demographics form. Required fields are marked with a red asterisk (*):

Contact Information

Collection, use, and disclosure of personal information

By booking through ClinicFlow, you will be asked to share your/your child/youth's personal information and personal health information. This information will be shared with one of the Eastern Ontario Region Public Health Units where your child or youth lives or goes to school in, for the purpose of submitting and reporting vaccine information to eHealth Ontario's provincial immunization system. Your information remains confidential and will not be used for any other purpose or as required by law. If you have questions about the use, collection and disclosure of your personal information and personal health information, please contact PrivacyInfo@kidscomefirst.ca.

Patient information

First Name * **Last Name ***

Please enter the patient's name exactly as it appears on their health card.

Preferred Name **Pronoun**

Date of Birth


Month * **Day *** **Year ***


Gender * **Phone Number ***

Health Card/Identification Type **Health Card/Identification Number**


Email Address * **Confirm Email Address ***

Once you have completed the demographics form and click "Confirm Appointment", the appointment is booked. You will now be prompted to complete forms:

 **Appointment Confirmed**
Thank You! A confirmation email has been sent to you.

 **Complete Form(s)**
Please complete the form(s) below before your appointment.

South-East Ottawa CHC (EN & FR)
1355 Bank Street Suite 700, Ottawa, K1H 8K7 | 613-737-5115 ext. 3535 | EN & FR

 Thursday, June 1, 2023 10:30 AM EDT

Services: Vaccine History Assessment

[Reschedule](#) [Book Another Person](#) [Cancel](#)

Form(s)

Please complete the form(s) below before your appointment.

Lila Luponza

General

- Sociodemographic

Sociodemographic Form

These questions are OPTIONAL and your child/youth's care will not be affected whether you chose to respond.

By booking through ClinicFlow, you will be asked to share your/your child/youth's personal information and personal health information. As part of this process, you will be asked to provide additional sociodemographic information. This information is

Once all forms are complete, you will be brought to the appointment summary page, where the appointment details, location map, and additional information for the appointment are displayed:

The screenshot shows a confirmation page with a green header stating "Appointment Confirmed" and a thank-you message. Below this is a dark blue section for "South-East Ottawa CHC (EN & FR)" with the address "1355 Bank Street Suite 700, Ottawa, K1H 8K7 | 613-737-5115 ext. 3535 | EN & FR" and the appointment time "Thursday, June 1, 2023 10:30 AM EDT". Buttons for "Reschedule", "Book Another Person", and "Cancel" are visible. The services booked are "Vaccine History Assessment".

APPOINTMENT INFORMATION
Thu, June 1st 2023
Thursday, June 1, 2023 10:30 AM EDT
1355 Bank Street Suite 700, Ottawa, K1H 8K7 | 613-737-5115 ext. 3535 | EN & FR

ATTENDEES
Lila Luponza (lila@canimmunize.ca)

SERVICES BOOKED
Vaccine History Assessment

PREPARING FOR YOUR APPOINTMENT

Step 1 Complete
Thank you for booking your child's vaccine appointment. Please complete the required forms.

Step 2 Thursday, June 1, 2023 10:30 AM EDT
Some children may feel uneasy or afraid of getting their vaccine(s), but there are a few resources that can help ease their anxieties and improve their experience:

- CHEO
 - [My Coping Plan](#)
 - [Distraction techniques](#)
 - [Improving your child's vaccination experience](#)

If an email is provided during booking, the individual will be able to return to this page and complete the forms (if they did not during initial booking) and self-manage their appointment by using the "Reschedule" and "Cancel" buttons.

Ways to Book an Appointment

There are a couple ways to book appointments for the public; internal-facing options will require you to be logged into the Console to access and external-facing options will not.

Booking Pages (External)

Booking Pages are pages configured by your Super Admin that are made available to the public and accessed outside of the Console. Booking Pages can be used for "Internal" purposes, to allow for additional availability and/or different demographic requirements as part of booking; these pages can be password protected (optional) but then are still available for booking outside of the Console.

The “New Appointment” Button (Internal)

The “+ New Appointment” button is available in the **Appointments** tab. It will open to the default booking page (usually the public-facing page). You will have access to other booking pages if they exist within your organization(s). Password protected booking pages will require the password.

The booking flow is the same as an end-user would experience on an external (from the console) booking page.

The “New Appointment” Button (Internal)

The “Book Appointment” button is available in the **Patient Profile–Appointments** subtab. It will open to the default booking page (usually the public-facing page). You will have access to other booking pages if they exist within your organization.

You do not need to enter demographic information when using this booking workflow because it is within the patient’s profile.

Managing Appointments

Individuals will be able to self-manage their appointments when an email is provided at the time of booking. You can also support rescheduling or canceling appointments within the Console in two different ways:

1. Within the **Appointments** tab. Search and/or find their appointment in the calendar and open to the Appointment Details screen.
2. Within the **Patient–Appointments** sub tab. Click the appointment and open the Appointment Details screen.

Accessing Reports

Reports provide an easy and secure way for ClinicFlow administrators to be able to download and review data that exists within the system. Your Super Admin will have worked with CANImmunize to build custom reports and define the schedule (e.g., weekly, daily at 4 PM) for each report. To access reports, go to the **Reports** tab.

All reports will be listed in reverse chronological order (i.e. the most recent reports at the top of the list). You can filter the list by selecting start and end dates or view only a specific report type by selecting it from the Report Type list.

Date	Type	File Name	Actions
2023-05-31	appointment-language	20230531193245_CANImmunize_Appointment_Language	Open Download
2023-05-31	clinic-vaccination-summary	20230531190951_CANImmunize_Clinic_Vaccination_Summary_CANI_CANI KCF Test Clinic	Open Download

Part 3: Managing Patient and Immunization Data

The **Repository** tab contains all patients that are associated with your organization(s) and is the go-to place to view and edit a patient’s demographic information, manage their vaccination records, document interactions using notes, and support booking their appointments.

The main landing page is an alphabetical list of all patients, including their name (Last, First), email, date of birth, gender, and health card number. Clicking on a patient row will open the Patient Profile which contains all existing data on the patient in ClinicFlow. Let’s dive into each section:

Patient Info

This is where all demographic information about the patient is stored. Patients will enter this information as part of the booking process. It can be edited in ClinicMode by Greeters and Immunizers, or within the Console using the “Edit” button.

PATIENT

← **Swift, Samantha (Sam)** [Edit](#) [Delete](#)

[Copy ID](#)

Patient Info

First Name	Samantha	Last Name	Swift	Preferred Name	Sam
Date of Birth	May 5, 2015 (8 years old)	Gender	Female	Pronoun	She/Her
Health Card Number	MY946AB (IFHP)	Email	samantha@canimmunize.ca	Phone	(613) 132-4568
Address	123 Main Street, Unit/Apt 215, Almonte K0A1A0		Managing Organization	CANI Organization	

Edit Patient Information

Click the “Edit” button to open the patient’s information. All fields can be edited by using the open text and picklist options. The “Save” button will be enabled once a change has been made to at least one field.

Swift, Samantha (Sam)

First Name *	Last Name *
<input type="text" value="Samantha"/>	<input type="text" value="Swift"/>
Preferred Name	Pronoun
<input type="text" value="Sam"/>	<input type="text" value="She/Her"/>
Birthdate *	Gender *
<input type="text" value="2015-05-05"/>	<input type="text" value="Female"/>
Health Card Type	Health Card Number
<input type="text" value="Interim Federal Health Program (IFHP)"/>	<input type="text" value="MY946AB"/>
Email	Phone
<input type="text" value="samantha@canimmunize.ca"/>	<input type="text" value="6131324568"/>
Street Address	Unit/Apt. #
<input type="text" value="123 Main Street"/>	<input type="text" value="215"/>
City	Postal Code
<input type="text" value="Almonte"/>	<input type="text" value="K0A1A0"/>
Deceased	Managing Organization *
<input type="checkbox"/>	<input type="text" value="CANI - CANI Organization"/>

Delete a Patient

You cannot delete a patient if they have dose(s) or appointment(s) on their profile. To delete a patient, click the “Delete” button.

- **Note:** This will not delete the patient from the database (but will remove them from being visible in the Console).

Vaccinations

This tab displays first by default, and allows you to add new or viewing existing vaccinations. Vaccinations will be listed in the table with the name, date and time, and the recorded dose number.

Edit a Vaccination

Vaccinations should mostly be documented using ClinicMode. Documented vaccinations in ClinicMode will appear here immediately after. Clicking into the row for the vaccine will open the Edit Vaccination window. All required fields are indicated with a red asterisk (*).

- You **cannot** change the clinic that the dose was administered.
- The picklist for Immunizers will be pre-populated with the list of ClinicMode users, assigned the Immunizer role, that are attached to the clinic.
- The Country field will populate based on the Vaccination Location chosen from the picklist.
- The Lot Expiry Date will populate based on the Vaccine and Lot Number chosen from the picklist.
 - Lot Numbers and their expiry dates are managed by CANImmunize based on information provided by Health Canada.

Editing a vaccination will update the information in real-time, and be immediately visible to Immunizers in ClinicMode.

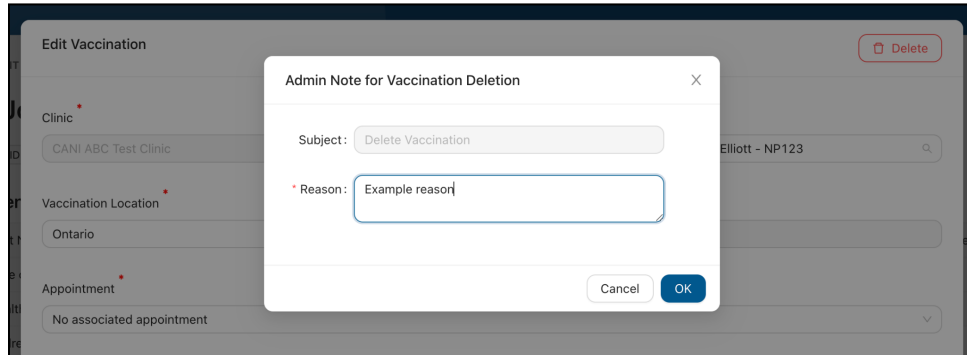
The screenshot shows the 'Edit Vaccination' form with the following fields and values:

- Clinic** (required): CANI ABC Test Clinic
- Immunizer** (required): Marlene (CANI Tester 2 - immunizer) Elliott - NP123
- Vaccination Location** (required): Ontario
- Country**: Canada
- Appointment**: No associated appointment
- Date of Vaccination** (required): May 31, 2023
- Time of Vaccination** (required): 18:36
- Timezone** (required): America/Toronto
- Vaccine** (required): Prevnar® 13 (Pneu-C-13)
- Lot Number** (required): L16104
- Lot Expiry Date**: August 31, 2017
- Site** (required): Right arm
- Route of Administration** (required): Intramuscular: IM
- Recorded Dose Number** (required): 1
- Immunization Reason** (required): Routine Immunization
- Dosage** (required): 0.5
- Dosage UOM** (required): mL
- Intended Series**: (Empty)

Additional text at the bottom of the form: "This dose has been forecasted on branch "KCF Series"

Delete a Vaccination

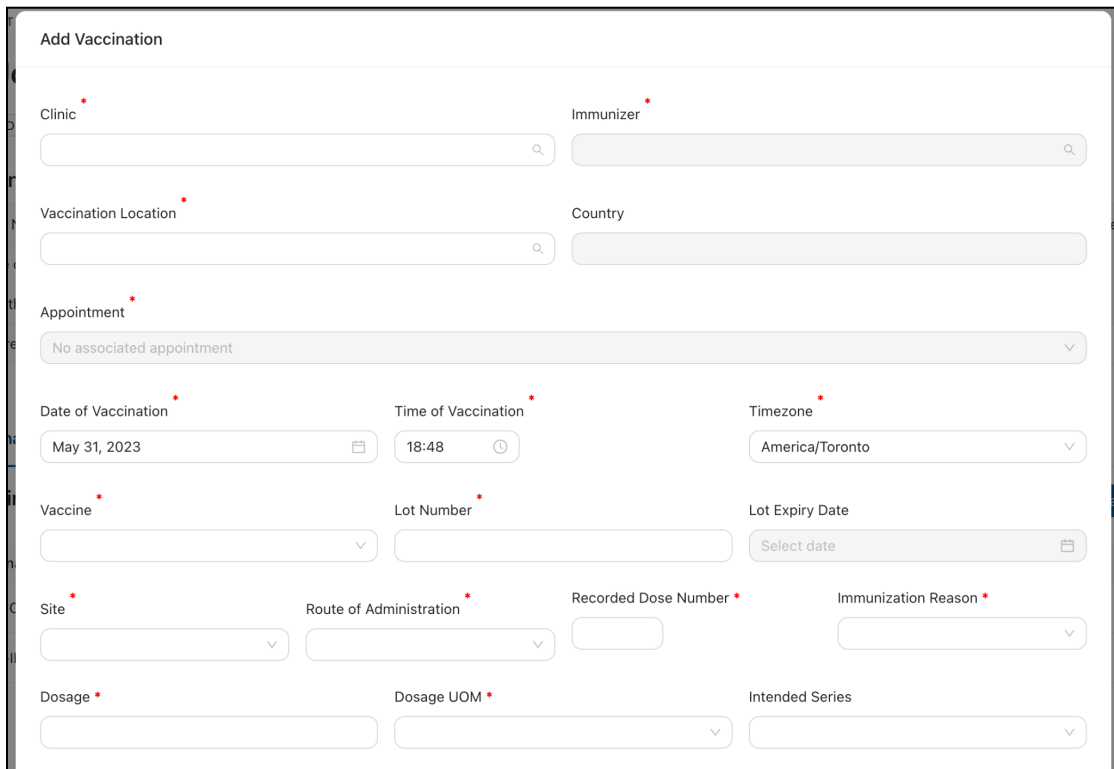
Similar to edit, click into the row of the desired vaccination to open the Edit Vaccination window. From there, click the “Delete” button on the top right. You will be prompted to enter a reason for deleting the vaccine; this will be automatically logged as an Admin Note.



The screenshot shows a modal dialog box titled "Admin Note for Vaccination Deletion" with a close button (X) in the top right corner. The dialog contains two input fields: "Subject" with the text "Delete Vaccination" and "Reason" with the text "Example reason". At the bottom of the dialog are two buttons: "Cancel" and "OK". The background shows a blurred "Edit Vaccination" form with fields for Clinic (CANI ABC Test Clinic), Vaccination Location (Ontario), and Appointment (No associated appointment). A "Delete" button is visible in the top right of the background form.

Add a Vaccination

Adding a vaccination in the Console should only be used for exception cases and/or when the form workflow is not needed. To add a vaccination, click the “Add Vaccination” button. You will be prompted to provide a “Reason for New Vaccination”; this will be automatically logged as an Admin Note.



The screenshot shows the "Add Vaccination" form with the following fields and controls:

- Clinic**: Search input field.
- Immunizer**: Search input field.
- Vaccination Location**: Search input field.
- Country**: Search input field.
- Appointment**: Dropdown menu with "No associated appointment" selected.
- Date of Vaccination**: Date picker showing "May 31, 2023".
- Time of Vaccination**: Time picker showing "18:48".
- Timezone**: Dropdown menu showing "America/Toronto".
- Vaccine**: Dropdown menu.
- Lot Number**: Text input field.
- Lot Expiry Date**: Date picker with "Select date" text.
- Site**: Dropdown menu.
- Route of Administration**: Dropdown menu.
- Recorded Dose Number**: Text input field.
- Immunization Reason**: Dropdown menu.
- Dosage**: Text input field.
- Dosage UOM**: Dropdown menu.
- Intended Series**: Dropdown menu.

AEFI

This tab allows you to add new or viewing existing Adverse Events Following Immunization (AEFI) notes. These can be associated with a (past) appointment on the patient. AEFI Notes created in the Console are viewable in ClinicMode, and vice versa.

To add an AEFI Note, click “Add Note” and complete the fields.

Create Note for Patient

Note Type
AEFI Notes

Links
May 16, 2023 11:00 AM EDT

Fields

AEFI Subject
Patient Faint

AEFI Note *
This is an example note for patient Sally. She received her MMR dose at 2:30 PM today. At 4:00 PM, her parent called to inform us that she fainted after getting home. Patient is okay now.

Cancel Submit

The date, time, and writer of the note (i.e. the email account the user is logged in with) will be automatically logged.

AEFI Notes

Date and Time	Author	Subject	Note Preview
May 31, 2023 6:13 PM	kathryndenize@canimmunize.ca	Patient Faint	This is an example note for patient Sally. She received her MMR dose at 2:30 PM today. At 4:0...

< 1 > / 25 / page

Notes

This tab allows you to add new or view existing Clinical Notes and Vax Decision notes.

- Vax Decision notes are automatically logged when vaccinating in ClinicMode.
- Clinical Notes can be associated with a (past) appointment on the patient. Clinical Notes created in the Console are viewable in ClinicMode, and vice versa.

To add a Clinical Note, click “Add Note” and complete the fields.

Create Note for Patient

Note Type
Clinical Notes Form

Links
No associated appointment

Fields
Note Subject
Example Note

Clinical Notes *

This is an example clinical note for patient Jeremy.

Patient came in for a vaccine today and expressed some arm discomfort with last vaccine (1 month ago). We discussed pain management strategies to use this time, to which he was amenable to. Tdap-IPV dose was administered with minimal pain.

Cancel Submit

The date, time, and writer of the note (i.e. the email account the user is logged in with) will be automatically logged.

Note Type	Date and Time	Author	Subject	Note Preview
Clinical Notes	May 31, 2023 6:06 PM	kathryndenize@canimmunize.ca	Example Note	This is an example clinical note for patient Jerem...

Appointments

This tab is where you can see all appointments (scheduled, past, canceled) for the patient, including which clinic the appointment was booked into. Clicking an appointment date will open the Appointment Details screen, where you can then cancel/reschedule the appointment.

You can also book new appointments for the patient using the “Book Appointment” button.

Cohorts

This tab is where you can see which cohort(s) a patient belongs to, and link/unlink a patient to an existing cohort. Search for the desired cohort and click the radio button (circle) to add the patient to the cohort; unclick the radio button to unlink them.

Forms

This tab is where you can see a list of all forms completed by the patient or a ClinicFlow user. Clicking on the row will display the values entered for each form.

Admin

This tab allows you to add new or viewing existing Admin Notes. These notes are *not* visible in ClinicMode as they are meant to document administrative (not clinical) details.

- An Admin note is automatically generated when you add or delete a vaccine in the console (with subject “Vaccination Added” and “Delete Vaccination”, respectively). In either workflow, you will be prompted to enter a “reason”; this will populate the body of the note.