

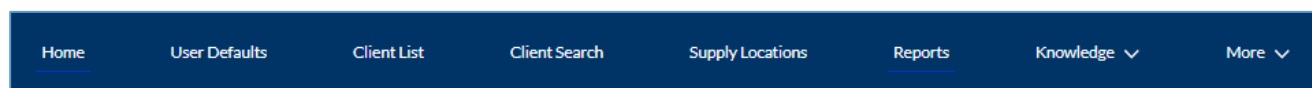
Getting started in ImmsBC 2.0

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This document provides an overview of ImmsBC 2.0, including changes and new features.

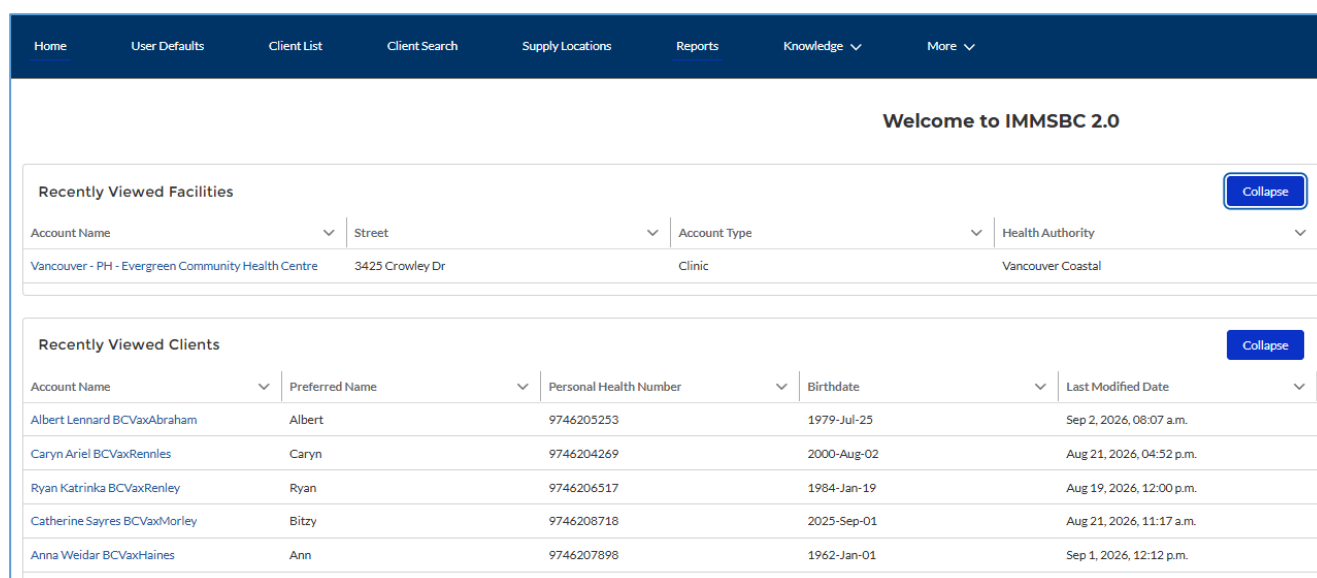
1. Navigation bar



The navigation bar is at the top of the screen. It has tabs for the key areas of ImmsBC 2.0.

1.1 Home

In ImmsBC 2.0 the *Home* page has two expandable tables, *Recently Viewed Facilities* and *Recently Viewed Clients*. See the screenshot below.

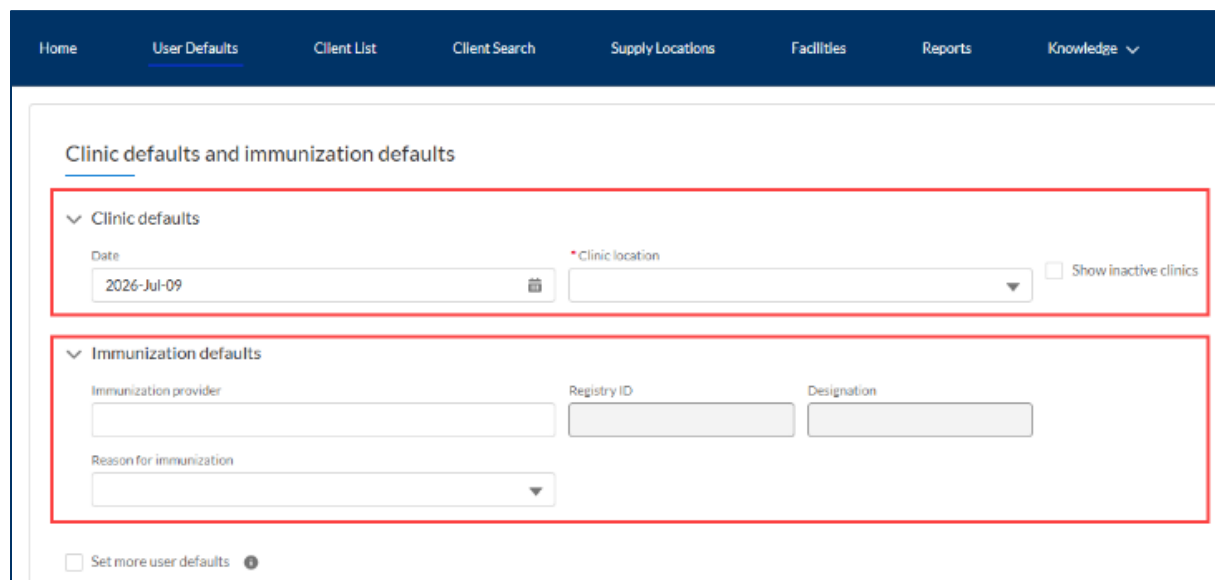


Recently Viewed Facilities displays the *Account Name*, *Street*, *Account Type* and *Health Authority*. *Account Name* is hyperlinked; click it to go to the *Facility account* screen, which is expanded by default to show all recently viewed facilities.

Recently Viewed Clients displays *Account Name*, *Preferred Name*, *Personal Health Number*, *Birthdate* and *Last Modified Date*. The *Account Names* are hyperlinked. Click them to go to that client's account page. This tab is collapsed by default so sensitive client data doesn't display when you first login. Click **Expand** to view the list. Click **Collapse** to hide the list.

1.2 User Defaults

You must select defaults on the *User Defaults* screen before starting the *Vaccine admin* workflow. Under *Clinic defaults*, select the **Date** and **Clinic Location**. Under *Immunization defaults*, select the **Immunization provider** and **Reason for immunization**.



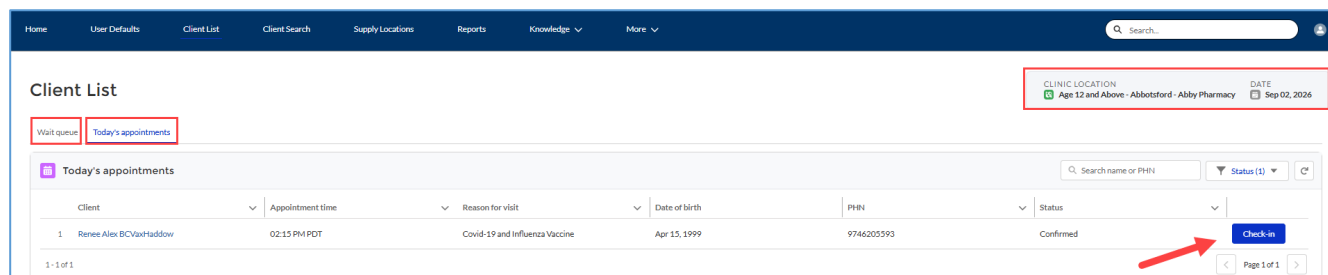
If you're immunizing using one product with one lot number, you can tick the **Set more user defaults** checkbox to enter *Product details* defaults, including *Agent*, *Lot number*, *Dosage*, *Route* and *Site*.

IMPORTANT Confirm with you supervisor before setting *Product details*.

User Defaults automatically clear at the end of the day. To change your defaults during the day, select a new **Clinic Location** and click **Save**. This will clear all defaults, including *Agent* information.

1.3 Client List

The *Client List* screen has two sections: *Wait queue* and *Today's appointments*. *Today's appointments* displays all clients that have booked an appointment for the date and clinic location set in *User Defaults*. *Wait queue* displays clients who have been checked in from the *Today's appointments* page or from the *Client* record. By default, these lists don't show client information once the appointment is complete. To see completed appointments, click the funnel and update the filter.



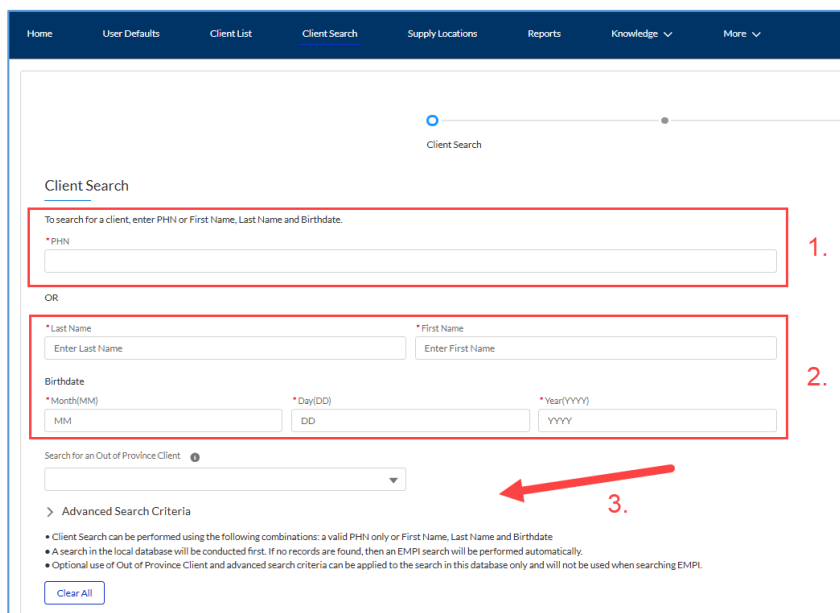
The screenshot shows the 'Client List' interface with the 'Today's appointments' tab selected. A table lists appointments, including one for 'Renee Alex BC/asthadow' on '02:15 PM PDT' for 'Covid-19 and Influenza Vaccine' on 'Apr 15, 1999'. A red arrow points to the 'Check-in' button at the bottom right of the table.

1.4 Client Search

On the *Client Search* screen, you can search for any client in ImmsBC, even if they don't have a current appointment, using one of these three methods:

1. **PREFERRED** Enter the client's **PHN**. Click **Search**. This is preferred because PHNs are unique, so you're less likely to pull up the wrong *Client* record.
2. If the PHN isn't available, enter the client's **Last Name**, **First Name** and **Birthdate**. Click **Search**.

TIP You can use partial searches. For example, if you enter "Rodri", the results will include "Rodriguez".

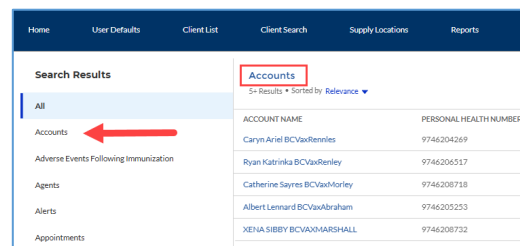


The screenshot shows the 'Client Search' interface. Red boxes and numbers highlight the search input fields: 1. PHN field, 2. Last Name and First Name fields, and 3. Birthdate fields. A red arrow points to the 'Search' button at the bottom.

3. If the client doesn't have a BC PHN, search using *Out of Province* and *Advanced Search Criteria*.

You can also use the global search bar in the top right corner of the page. This is less precise, as it will display any matching data in ImmsBC. For example, if you search for “Kimberly”, results will include clients named Kimberley and results related to the Kimberly Health Unit.

To narrow the search, click a **Search Results** category. For example, if you’re looking for an account, click **Accounts** to limit the search to *Accounts*. See the screenshot on the right.

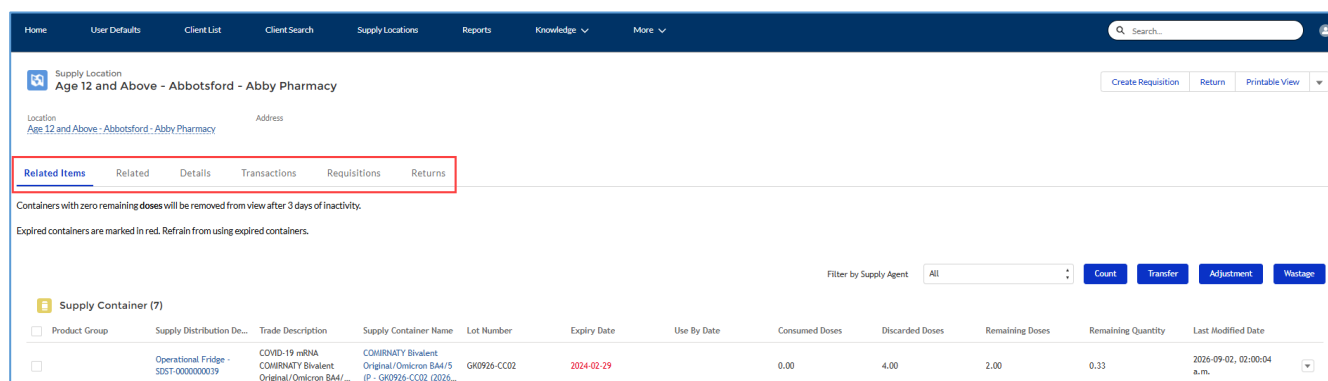


Search Results	
Accounts	
3 Results • Sorted by Relevance	
ACCOUNT NAME	PERSONAL HEALTH NUMBER
Caryn Ariel BCVAxRennies	9746204269
Ryan Katrina BCVAxRennies	9746206517
Catherine Sayres BCVAxMorley	9746208718
Albert Leonard BCVAxAbraham	9746205253
XENA SIBBY BCVAxMARSHALL	9746208732

1.5 Supply Locations

The *Supply Locations* tab is used by clinicians with access to clinic inventory, including users with these roles: *Inventory Only*, *Clerk/Clinician*, *HA Lead* and *Regional Admin*.

By default, the *Supply Locations* screen displays *Recently Viewed Supply Locations*. Click the **down arrow** and select from the dropdown to filter by *All*, *Active Supply Locations* or *Health Authority* instead. Click a **Supply Location names hyperlink** to go to the *Supply Location* screen, where you can view *Supply Containers*, *Transaction*, *Requisitions*, *Returns*, *Reports*, and more as in the screenshot below.



Product Group	Supply Distribution De...	Trade Description	Supply Container Name	Lot Number	Expiry Date	Use By Date	Consumed Doses	Discarded Doses	Remaining Doses	Remaining Quantity	Last Modified Date
Operational Fridge - SST-0000000019	COVID-19 mRNA COMIRNATY Bivalent Original/Omicron BA4/5	COMIRNATY Bivalent Original/Omicron BA4/5 (P - GH0926-CC02 (2026...	GH0926-CC02		2024-02-29		0.00	4.00	2.00	0.33	2026-09-02, 02:00:04 a.m.

1.6 Reports and Knowledge

On the *Reports* tab you can access ImmsBC reports, including reports for operational planning, data remediation and data quality and executive reporting.

The *Knowledge* tab has subtabs for *In-Clinic*, *Inventory*, *Scheduling* and *Support Bulletins*. Click a subtab to view the associated ImmsBC reference guide.

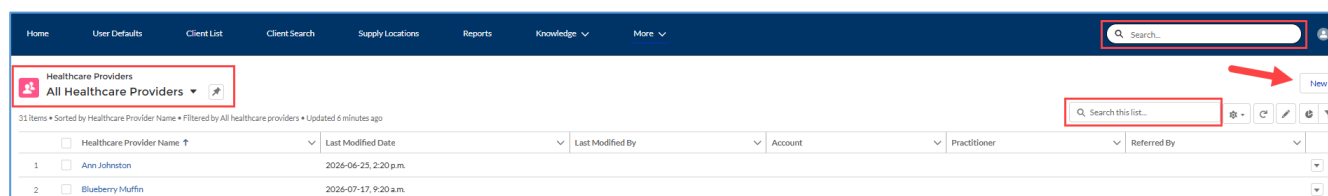
1.7 Healthcare Providers

Healthcare Providers was called *Contacts* in ImmsBC 1.0. In this tab you can add, edit and delete *Providers*.

When users get access to ImmsBC, they're automatically added as a *Healthcare Provider*. Only add providers who can't log in to ImmsBC but have provided immunizations which are being documented in ImmsBC. For example, if clerk Joshua is documenting on behalf of Dr. Meredith Grey and Dr. Grey can't access to ImmsBC, clerk Joshua must add Dr. Grey.

The *Healthcare Providers* screen defaults to displaying *Recently Viewed Providers*. Click the down button to filter by *All Healthcare Providers*.

To search for a *Healthcare Provider*, use the *Healthcare Provider* search bar or the *Global Search*. To add a *Healthcare Provider*, click **New**.



2. Client Record

Once you've found your *Client* and clicked **Account Name**, or clicked on the **Client** in a client list, the *Client* record screen will display.

The client banner displays important clinical information including *Active Alerts*, *Preferred name*, *Birthdate*, *Personal Health Number*, *Age* and *Sex*. The right side has *New Email*, *New Phone*, *New Note*, *New Alert* and *Check-in Client* buttons.

NOTES

- In ImmsBC 1.0, clicking *Check-in Client* opened the *Vaccine admin* workflow, but in 2.0 it adds the *Client* to the *Wait Queue*.
- The *Details* and *Related* tabs are now called the *Client* and *Clinical records* tabs.
- In ImmsBC 2.0 there are more tabs below the client banner than in 1.0, including new tabs *Vaccine admin*, *Communication History* and *Appointments*.

2.1 Client & Clinical records tabs

In ImmsBC 2.0, the *Client* screen has been simplified. It only displays biographical and contact information with a map under *Mailing Address*. The *Verify PHN*, *Refresh Forecast* and *Check-in Client* buttons have been removed.

Updating contact information has also changed. The *Client* screen has a *Contact Information* section. Data displayed here comes from the Enterprise Master Patient Index (EMPI), the database that manages all BC PHNs. When clients update their contact information online, it will display in ImmsBC 2.0 as a *Contact Point*.

To change *Client* contact information, update the *Contact Point* using these steps: in the client header, click **New Email** or **New Phone**. Enter the new data. If there's already a *Contact Point Phone Number* or *Email*, open the record, add an end date, then create the new *Contact Point* record. If the update is in the context of an immunization appointment, select **Usage Type "IMMS"**. If it's related to MACS, select **Usage Type "MACS"**.

The *Clinical records* tab displays the client's clinical data for clinicians to review. In 2.0, the *Consents* section now has *Active* and *Inactive Consents*, *Alerts* is higher on the screen, and *Appointments* is a separate tab next to *Vaccine scheduling*.

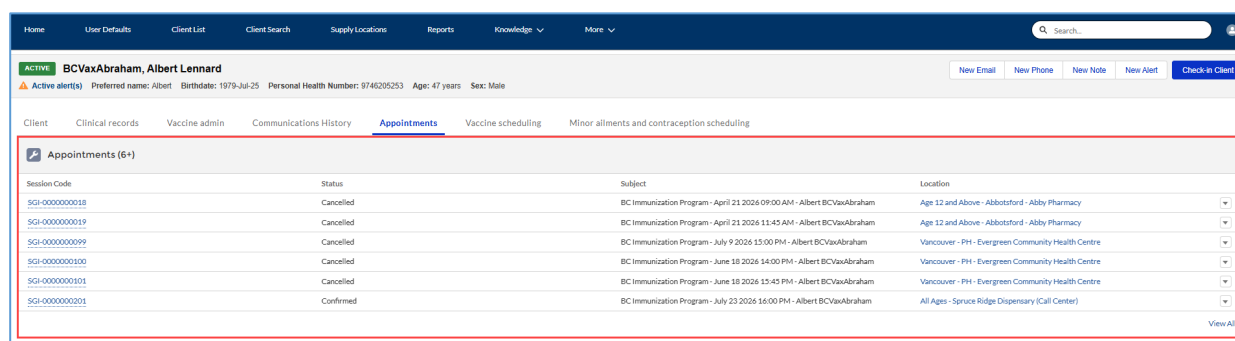
2.2 Vaccine admin & Communication History

You access the *Vaccine administration* workflow on the *Vaccine admin* tab.

The *Communication History* tab lists the client's email and SMS history. Here you can check if the client got ImmsBC communications, such as invitations to book an appointment.

2.3 Appointments

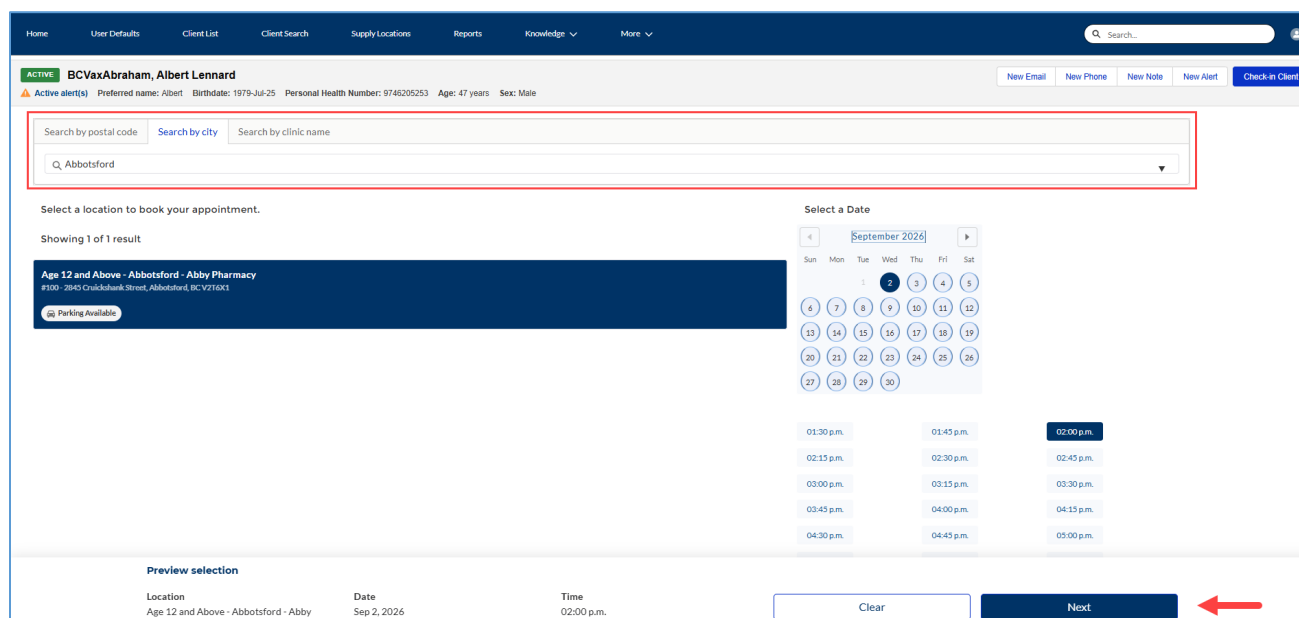
In the *Appointments* tab, you can view the client's appointment history, including upcoming, confirmed and cancelled appointments. Click on an appointment's **Session Code** to view more details.



Session Code	Status	Subject	Location
SGI-0000000018	Cancelled	BC Immunization Program - April 21 2026 09:00 AM - Albert BCVaxAbraham	Age 12 and Above - Abbotsford - Abby Pharmacy
SGI-0000000019	Cancelled	BC Immunization Program - April 21 2026 11:45 AM - Albert BCVaxAbraham	Age 12 and Above - Abbotsford - Abby Pharmacy
SGI-0000000099	Cancelled	BC Immunization Program - July 9 2026 15:00 PM - Albert BCVaxAbraham	Vancouver - PH - Evergreen Community Health Centre
SGI-0000000100	Cancelled	BC Immunization Program - June 18 2026 14:00 PM - Albert BCVaxAbraham	Vancouver - PH - Evergreen Community Health Centre
SGI-0000000101	Cancelled	BC Immunization Program - June 18 2026 15:45 PM - Albert BCVaxAbraham	Vancouver - PH - Evergreen Community Health Centre
SGI-0000000201	Confirmed	BC Immunization Program - July 23 2026 16:00 PM - Albert BCVaxAbraham	All Ages - Spruce Ridge Dispensary (Call Center)

2.4 Vaccine scheduling & MACS

Use the *Vaccine scheduling* and *Minor ailments and contraception scheduling* (MACS) tabs to book their respective services and search for a *Clinic* by *Postal code*, *Search by city* or *Search by clinic name*. Once you select a *Clinic*, dates and times will populate so you can select them. Once saved, the booked appointment will display in the *Appointments* tab.



Home User Defaults Client List Client Search Supply Locations Reports Knowledge More

ACTIVE BCVaxAbraham, Albert Lennard

Active alert(s) Preferred name: Albert Birthdate: 1979-Jul-25 Personal Health Number: 9746205253 Age: 47 years Sex: Male

New Email New Phone New Note New Alert Check-in Client

Search by postal code Search by city Search by clinic name

Q Abbotsford

Select a location to book your appointment.

Showing 1 of 1 result

Age 12 and Above - Abbotsford - Abby Pharmacy
#100 - 2840 Craddockhank Street, Abbotsford, BC V2T 6X1

Q Parking Available

Select a Date

September 2026

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30

01:30 p.m. 01:45 p.m. 02:00 p.m.

02:15 p.m. 02:30 p.m. 02:45 p.m.

03:00 p.m. 03:15 p.m. 03:30 p.m.

03:45 p.m. 04:00 p.m. 04:15 p.m.

04:30 p.m. 04:45 p.m. 05:00 p.m.

Preview selection

Location Age 12 and Above - Abbotsford - Abby Date Sep 2, 2026 Time 02:00 p.m.

Clear Next

3. Pharmacy: PHN now required

In ImmsBC 2.0, pharmacists can't document publicly funded immunizations for clients without a PHN. The temporary PHN creation process is no longer supported. Pharmacists should direct clients seeking immunizations without a PHN to contact their public health unit or the ImmsBC call centre.

4. Revision history

DATE	#	AUTHOR(S)	CHANGES/COMMENTS
2026SEP08	2.0	B. Coles, C. Smith	Created.