

# User Guide

## GENERAL

### Risk Factors

- View Risk Factors
- Add Risk Factors
- View/Update Risk Factor Details
- Delete Risk Factors



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## A. Introduction

**NOTE:** Risk Factors are associated with the client in context. In the future, if they are **created** from the Investigations module, (future deployment), the **Risk Factor** will be considered **pertinent to** that investigation.

**NOTE:** A **Risk Factor** does not trigger a client warning, and is not displayed on the Immunization screens (**Client Immunization Profile** and **Client Immunization View / Add**). It is however, displayed in the **Client Immunization Record Report**. To view Risk Factors for a client, access them from the LHN. Risk Factors MAY cause the Forecaster to adjust, but clinicians should check the Forecaster Handbook to confirm which RF's have rules.

A Risk Factor is a client-specific, manually entered notice of important information that should be considered by the public health worker when providing services to a client. It is any attribute, characteristic or exposure of an individual that increases the likelihood of developing a disease or injury for which they would be eligible to receive publicly funded vaccine(s).

If the Saskatchewan Forecaster is configured to do so, a client's immunization forecast may be affected by the Risk Factors on the client's record. For example: a client with a risk factor that indicates that the baby's mother has Hepatitis B, could then trigger a special immunization schedule that includes HB at birth, 1 month of age, and 6 months of age.

**Assumptions:** The user has the appropriate security permissions to perform the assigned tasks.

As per the provincial Policy on Risk Factors posted on Gateway: Panorama users will discuss the documentation of risk factors in Panorama with the client during the consent process where applicable. This may include an additional review of the current version of the Protecting the Privacy of Your Immunization Record (PHNP 63) fact sheet with the client and when appropriate a discussion of the additional privacy options available in Panorama.

**Pre-requisites:** The user has successfully logged into Panorama. A client is in context.

**Related User Guides:**

**Add Immunization**

See also the Panorama Gateway for relevant Policies and Bulletins.

**Menu Access:** Risk Factors access is available from the left-hand navigation bar.

1. Select Client > Risk Factors menu from the left navigation bar.

Risk Factors Summary screen.

NOTE: Access Risk Factors from the left hand navigation menu.

### Risk Factors ?

ACTIVE

Client ID: <b>646</b>	Name(First,Middle,Last)/Gender: Shawn JS-Cockatoo / Male	Health Card No: -	Date of Birth / Age: 2014 Jan 30 / 6 mos 28 days
Phone Number: (306)-533-2353(Primary home)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

\* Required field

**Risk Factors** ↑ Hide Risk Factors

\* Category:

\* Risk Factor:

\* Additional Information:

\* Response:       Frequency:

Start Date:  /  /  [...]  
yyyy      mm      dd

End Date:  /  /  [...]  
yyyy      mm      dd

End Date Reason:

Reported By:

\* Reported Date:  /  /  [...]  
yyyy      mm      dd

Specify:

---

**Row Actions:**

\* Reason for Deletion:        \* Set Response to:

Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation

## B. Risk Factors

### 1.0 View Risk Factors

1. Click Client > Risk Factors menu from the left navigation bar.

The Risk Factors screen displays.

NOTE: All recorded Risk Factors are listed at the bottom of the page in the Risk Factor Summary table. The top portion of the screen is used for adding / updating Risk Factors.

Risk Factors were successfully saved.

\* Required field

**Risk Factors** ^ Hide Risk Factors

\* Category:

\* Risk Factor:

\* Additional Information:

\* Response:       Frequency:

Start Date:  /  /        End Date:  /  /

yyyy      mm      dd

End Date Reason:

Reported By:       \* Reported Date:  /  /

yyyy      mm      dd

Specify:

---

Row Actions:

\* Reason for Deletion:        \* Set Response to:

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	Neonate High Risk for HB - Equal to or Greater Than 2000g	2014 Aug 27	Yes	-	2014 Jan 30	-	-	-

## 2.0 Add Risk Factors

1. Click Client > Risk Factors menu from the left navigation bar.

The Risk Factors Summary screen displays.

**NOTE:** Creating an immunization risk factor may trigger the Forecaster. The Appendix in this document shows the Risk Factors that trigger a special "high risk" immunization schedule. For additional information check the Forecaster Handbook.

**\*Required field**

**Risk Factors** ^ Hide Risk Factors

**\* Category:**

**\* Risk Factor:**

**\* Additional Information:**

**\* Response:**  **Frequency:**

**Start Date:**  /  /   **End Date:**  /  /

yyyy      mm      dd

**End Date Reason:**

**Reported By:**  **\* Reported Date:**  /  /

yyyy      mm      dd

**Specify:**

---

**Row Actions:**

**\* Reason for Deletion:**   **\* Set Response to:**

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	Neonate High Risk for HB - Equal to or Greater Than 2000g	2014 Aug 27	Yes	-	2014 Jan 30	-	-	-

**NOTE:** The list of Risk Factors is configured to meet Saskatchewan requirements. The screenshot here is a sample list only – make sure to review the Forecaster Handbook posted on Panorama Gateway for all Risk Factors and their impact on Immunization Forecast..

2. The Category drop-down list will default to **All** – there is no need to select the other option which is **Immunization** category at this time, as only Immunization category Risk Factors exist until future implementation of Investigations is undertaken. In our current configuration Category Type **All** and **Immunization** will return the identical list.
3. The Risk Factors screen is refreshed with a list of risk factors for the selected category.

The screenshot shows a web form titled "Risk Factors". At the top right, there is a "Hide Risk Factors" link. The form contains several sections:

- Category:** A dropdown menu currently set to "All".
- Risk Factor:** A dropdown menu is open, displaying a list of risk factors such as "Anatomic or Functional Asplenia, And Hyposplenia", "Bleeding Disorders", "Chronic Heart/Lung Disease", etc. The first item is checked with a small square.
- Additional Information:** A text area for providing extra details.
- Response:** A dropdown menu for selecting a response.
- Start Date:** A date field with a "Print Date" button.
- Reported By:** A text field with a "Print Name" button.
- Specify:** A text field for further specification.
- Row Actions:** Includes an "Update" button.
- Reason:** A section with a checkbox and the text "Hep A Pediatric Program".

At the bottom right of the form, there are "Save" and "Reset" buttons.

4. Select a risk factor from the Risk Factor list.
5. Add any **Additional Information** relating to this Risk Factor. (Only specific Risk Factors will activate this field).
6. Select the **Response** from the Client when asked about Risk Factors. (Think of the Risk Factor as the question you are asking, and Yes or No is the response. For immunization clients, we will only be recording Risk Factors where the response is Yes – they exist. (Investigations staff in future will have pre-set “questions” or Risk Factors to be sure to ask their clients about, and will expect both yes and no answers. For Immunization if the Client doesn’t have a risk factor, we do not record that significant “negative”).



**NOTE:** Don't forget to click **Save** once all the Risk Factors are added to the table. Otherwise these will not be saved to the Client's record.

7. Select the **Frequency** of occurrence of the Risk Factor (e.g. continuous, more than once, etc.).
8. Add the **Start** and **End Date** of the Risk Factor if applicable. If an End Date is entered, the **End Date Reason** field is activated. **IMPORTANT NOTE:** Check for current Bulletins on Risk Factors: There is a known functional defect in Panorama that results in the invalidation of historical vaccine doses if the start and end dates are used for immunization antigens that have been given historically to the client. Check your immunization history and start dates of Risk Factors to ensure you are not affecting events in the past incorrectly.
9. In the **Reported By** field, select who/ how the Risk Factor was reported to the provider recording the risk factor.
10. The **Specify** field is activated if the **Reported By** field is filled. Enter details as required. The **Specify** field is activated if the **Reported By** field is filled. Enter details as required.
11. The **Reported Date** is defaulted to the current date and for immunization service is expected to be the date they present for immunizations.
12. Click the Add button to add the Risk Factor to the Table.
13. Continue steps 3 to 11 until all Risk Factors are entered into the Table.
14. Click **Save**.

The Risk Factors Summary screen is refreshed. A confirmation message is displayed and the selected risk factors are added to the summary table.

Risk Factors were successfully saved.

\* Required field

**Risk Factors** ^ Hide Risk Factors

\* Category:

\* Risk Factor:

\* Additional Information:

\* Response:       Frequency:

Start Date:  /  /        End Date:  /  /    
yyyy      mm      dd      yyyy      mm      dd

End Date Reason:

Reported By:       \* Reported Date:  /  /    
yyyy      mm      dd

Specify:

---

Row Actions:

\* Reason for Deletion:        \* Set Response to:

<input type="checkbox"/>	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	Chronic Heart/Lung Disease	2014 Aug 28	Not Required	-	-	2014 Aug 28	-	-
<input type="checkbox"/>	Health Care Worker	2014 Aug 28	Yes	Continuous	2014 Aug 04	-	-	-
<input type="checkbox"/>	Hep A Pediatric Program	2014 Aug 28	Yes	More Than Once	2014 Aug 05	-	-	-

### 3.0 View/Update Risk Factor Details

1. Click Client > Risk Factors menu from the left navigation bar.

The Risk Factors Summary screen displays.

\* Required field

**Risk Factors** ⤴ Hide Risk Factors

\* Category:

\* Risk Factor:

\* Additional Information:

\* Response:       Frequency:

Start Date:  /  /        End Date:  /  /

yyyy      mm      dd      yyyy      mm      dd

End Date Reason:

Reported By:       \* Reported Date:  /  /

yyyy      mm      dd

Specify:

---

**Row Actions:**            

\* Reason for Deletion:

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	Chronic Heart/Lung Disease	2014 Aug 28	Not Required	-	-	2014 Aug 28	-	-
<input checked="" type="checkbox"/>	Health Care Worker	2014 Aug 28	Yes	Continuous	2014 Aug 04	-	-	-
<input type="checkbox"/>	Hep A Pediatric Program	2014 Aug 28	Yes	More Than Once	2014 Aug 05	-	-	-

2. Select the Risk Factor checkbox to the left of the one for editing.
3. To update the Client's response, select it in the **Set Response To** drop-list and click **Set**. The change is then reflected in the Response Column within the Table, and also within the Risk Factor record.
4. To make changes to the Risk Factor record, select the Risk Factor within the Table and Click **Update**.

The top of the Risk Factors screen displays the Risk Factor for editing. Note that only some fields are activated for updates.

**TIP:** There are some fields within the **Risk Factors** section that are not reflected in the **Risk Factory Summary Table** at the bottom of the screen. In order to view the contents of these fields (Additional Information, Reported By, Specify, and Reported Date), the user must select the Risk Factor with the checkbox, then click **Update**. This will display the details within the fields at the top of the Risk Factors screen.

**\* Required field**

**Risk Factors** ^ Hide Risk Factors

**\* Category:** All

**\* Risk Factor:** Health Care Worker

**\* Additional Information:**

**\* Response:** Yes **Frequency:** Continuous

**Start Date:** 2014 / 08 / 04 **End Date:** / /

yyyy mm dd **End Date Reason:**

**Reported By:** Client **\* Reported Date:** 2014 / 08 / 28

yyyy mm dd

**Specify:**

**Apply Update** **Clear**

---

**Row Actions:** **Update**

**\* Reason for Deletion:** **Delete** **\* Set Response to:** **Set**

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input type="checkbox"/>	Chronic Heart/Lung Disease	2014 Aug 28	Not Required	-	-	2014 Aug 28	-	-
<input checked="" type="checkbox"/>	Health Care Worker	2014 Aug 28	Yes	Continuous	2014 Aug 04	-	-	-
<input type="checkbox"/>	Hep A Pediatric Program	2014 Aug 28	Yes	More Than Once	2014 Aug 05	-	-	-

**Save** **Reset**

5. Enter the updated information as required

A common update involves inactivating Risk Factors. Risk Factors should be inactivated by setting an **End Date** if they no longer apply. Setting an **End Date** preserves the valuable Risk Factor history, but ensures that the Forecaster rules will not adjust the clients immunization forecast specifically for that Risk Factor. Once the End Date has been selected, click **Apply Update**.

The Risk Factor Details section and the Risk Factors Table is refreshed.

#### 4.0 Delete Risk Factors

**TIP:**

Ensure you are following clinical documentation best practice guidelines before deleting any clinical data. Discuss with your Superuser or supervisor if clarification required. Is an end date required rather than a delete?  
See my suggestion for wording in the text

Caution: In most instances, a risk factor should be “end-dated” rather than deleted. If you are deleting a risk factor (e.g. entered in error, etc.) ensure you are following clinical documentation best practice guidelines for deleting personal health information.

1. Click Client > Risk Factors menu from the left navigation bar.

The Risk Factors screen displays.

**\* Required field**

**Risk Factors** ^ Hide Risk Factors

\* **Category:**

\* **Risk Factor:**

\* **Additional Information:**

\* **Response:**       **Frequency:**

**Start Date:**  /  /        **End Date:**  /  /

yyyy      mm      dd      yyyy      mm      dd

**End Date Reason:**

**Reported By:**       \* **Reported Date:**  /  /

yyyy      mm      dd

**Specify:**

---

**Row Actions:**

\* **Reason for Deletion:**        \* **Set Response to:**

	Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation
<input checked="" type="checkbox"/>	Chronic Heart/Lung Disease	2014 Aug 28	Not Required	-	-	2014 Aug 28	-	-
<input checked="" type="checkbox"/>	Health Care Worker	2014 Aug 28	Yes	Continuous	2014 Aug 04	-	-	-
<input checked="" type="checkbox"/>	Hep A Pediatric Program	2014 Aug 28	Yes	More Than Once	2014 Aug 05	-	-	-

2. Select one or more risk factors in the summary table to delete. The Reason for Deletion drop-down is activated. Select a Reason from the Reason for Deletion drop-down and Click the Delete button.
3. Click **Save**.

**TIP:** Once you have deleted the Risk Factors, you must click **Save**. If you don't, the Risk Factors will not be deleted from the Client's record.

The **Risk Factors** screen is refreshed and a message is displayed in the Header indicating that the Risk Factors have been deleted.

### Risk Factors ?

ACTIVE

Client ID: <b>623</b>	Name(First,Middle,Last)/Gender: Allison JS-Alligator / Female	Health Card No: -	Date of Birth / Age: 2001 Mar 22 / 13 yrs 5 mos
Phone Number: (306)-222-3255(Primary home)	Jurisdiction Info: Saskatchewan,Saskatoon RHA	Additional ID Type / Additional ID: Provincial health service provider identifier / -	

3 Risk Factor(s) have been deleted.

\* Required field

#### Risk Factors ^ Hide Risk Factors


\* Category:

\* Risk Factor:


\* Additional Information:

\* Response:

Frequency:

Start Date:  /  /  


yyyy mm dd

End Date:  /  /  

yyyy mm dd

End Date Reason:

Reported By:

\* Reported Date:  /  /  

yyyy mm dd

Specify:

Row Actions:

\* Reason for Deletion:   | \* Set Response to:

Risk Factor	Reported Date	Response	Frequency	Start Date	End Date	End Date Reason	Pertinent to Investigation

## C. Appendix

NOTE: See also the Panorama Gateway Training Portal for the Understanding the Forecast Training Video, and the Forecaster Fundamentals User Guide.

### 1.0 The Immunization Forecast Rules and Risk Factors

If a client has a Risk Factor they may also then be eligible for specific vaccines and the risk factor will trigger immunization rules that adjust the Forecast for that client. To understand which Risk Factors interact with the Forecast, see the Forecaster Handbook – Risk Factors Section as well as pertinent Bulletins and Policies around Risk Factors, available on the Panorama Gateway.