Risk Factors – IOM WS 4.4.6	**Name of Activity:** i. Entering a preset Risk Factor ii. Updating Existing Risk Factor iii. Adding Risk Factor that is not a preset iv. Copy to Investigation **Role performing Activity:**
Panorama – IOM WORK STANDARD	**Location:** | **Department:** **Document Owner:** **Date Prepared:** May 12, 2018 | **Last Revision:** July 25, 2022 | **Date Approved:**

Assumptions: Client and Investigation in context

NOTE: '+' at the end of a risk factor name indicate it will affect the client's vaccine forecaster, if the 'response' is set to 'yes'.

Related Policies: Investigator responsibility – Entering Risk factors/special considerations to affect the vaccine forecaster.

A Risk Factor with a response of "YES" is "Active" from the Start Date to the End Date recorded on that instance. If the End Date is in the past then the RF is no longer active. If there is no end date recorded then the Risk Factor is active..

What's New in version 4.4?

- In the previous version, a RF was added to the client record and could be made "pertinent to an Investigation". RF's are now added directly to an investigation, not the client. The "pertinent to investigation" functionality has been removed.
- In the previous version, a RF could only be added once (unless end dated) to a client record with a single "response" and one start/end date. A RF can now be added to more than 1 investigation. Each iteration will have its own "response" and start/end dates specific to the investigation. The "responses" may/may not be the same and these dates can now overlap if required.

Essential Tasks:	
1.	**LHN > SUBJECT > RISK FACTORS**
2.	• **Entering a preset Risk Factor** • From the LHN Menu - under SUBJECT - click the Risk Factors button or click the Risk Factor link under Risk Factors on the Investigation Summary Page. • The Show Expired Responses defaults to checked (uncheck if you don't want expired responses to display) • Check the box beside preset risk factor(s). • Multiple RF's can be selected at the same. • Click the "Set Response" button (this will set response for all selected RF's) • *For surveillance/reporting purposes, some diseases require a response to every preset and will be indicated as such on the Notification Form or the DCW for the investigator. The rest of the diseases only need an entry for those Risk Factors that are present* • *If a response is needed for all RFs, select all (use button at top of list) (be sure to de-select any pre-*

	existing risk factors)and set all to 'no', then change those individual RF identified to 'yes' as appropriate. • Select "Response" from Drop List • ~~Click on "Set" Button~~ • Select "Effective From" date from calendar (this will set eff date for all RF's selected) • Select "Effective To" Date (entering this date will inactivate the RF's impact to the investigation. (this will update all selected RF's) • Reported Date is defaulted to todays date. • Click on "Apply" Button Note: Additional Information is a required field for IOM RF's. If you are updating or adding a preset RF then you must add a comment to the Additional Information field. You will receive a message that the add'l info field is required if additional informaiton is not added. • Check the box next to the RF to be corrected, and click on the "Update" button • Add comment to Additional Information Field • Click on "Apply" button • Click on "Save" button • This is to be repeated for all preset RF's that require additional information Note: using the "Reset" button will discard all changes: reset input field data to their default or previously saved values
3.	**i. Updating an Existing Risk Factor (ie. adding dates).** **NOTE: If a risk factor has '(add'l info)' in the title, more detail is required.** • Scroll down to preset Risk Factor • Click on the "Add" button • Check the box beside preset risk factor • Click on "Update" Button in the top bar of the preset section • Enter the information you wish to update • Click on 'Apply Update' button. • Click on 'SAVE' Button

4.	**ii. Risk Factors not in the preset that require documentation:**
	
	• Click on the "Add" button, upper right of page
	• Select Category from drop down list
	• Select risk factor from the master drop down list
	• Additional Information (required field)
	    o Enter concise details in this area (ie. Location/Event - City/Province/Business Name/Hospital name/Body location, etc.
	    o If there is no additional information to chart, enter "none" in space.
	    o If there is more specific information to chart, use the Specify area.
	• Select " Response" from drop down list
	• Select Frequency (if applicable).
	• Select Effective From and Effective To Dates (if applicable)- if only have year or month, use 01 for day. If it is a one day event – end date as the next day- 24 hours later than the start date. Ongoing risk factors may only have a start date and no end date.
	• Select Reported by from drop down list
	• Select Reported Date – date information was provided to you.
	• Enter any "Reported by Details" (details of person reporting)
	NOTE: Select from the drop list to enable the Reported by Details field.
	• Click on "Apply" Button

	• Click on “Save” Button **NOTE: Must repeat process as needed for each risk factor not in preset**
5.	**iv. Copy to Investigation –** a RF used on another investigation can be “copied” to the investigation in context **Under the “Risk Factor Responses: Client and Other Investigations Banner** • Select the RF(s) you wish to Copy • Click on “Copy to Investigation Button**”** • This will create a “copy” of the RF onto the Investigation in Context • Click “Save”