

# Risk Assessment, Goals, and Interventions Tracker New Features - OP 21.3.46

Last Modified on 12/11/2023 2:08 pm EST

## About

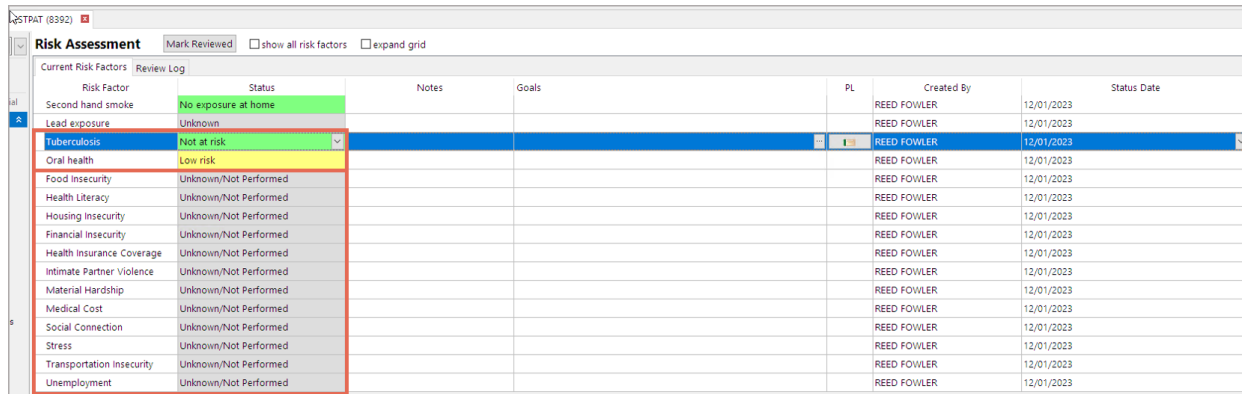
Tracking risk factors, including social determinants of health (SDOH) can be an important part of monitoring a child and family's overall well-being. This article will go over the following new features in OP:

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## Patient Risk Assessment

The current Risk Assessment area of the chart (**Clinical > Risk Assessment**) permits practices to assess multiple risk factors, including social determinants of health. Here you can see that a patient has been assessed as **not being at risk** for tuberculosis (green), while their oral health (yellow) is marked as **low risk**. Other risk factors which have not been assessed appear as **Unknown/Not Performed** and are colored grey:



Risk Factor	Status	Notes	Goals	PL	Created By	Status Date
Second hand smoke	No exposure at home				REED FOWLER	12/01/2023
Lead exposure	Unknown				REED FOWLER	12/01/2023
Tuberculosis	Not at risk				REED FOWLER	12/01/2023
Oral health	Low risk				REED FOWLER	12/01/2023
Food Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Literacy	Unknown/Not Performed				REED FOWLER	12/01/2023
Housing Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Financial Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Insurance Coverage	Unknown/Not Performed				REED FOWLER	12/01/2023
Intimate Partner Violence	Unknown/Not Performed				REED FOWLER	12/01/2023
Material Hardship	Unknown/Not Performed				REED FOWLER	12/01/2023
Medical Cost	Unknown/Not Performed				REED FOWLER	12/01/2023
Social Connection	Unknown/Not Performed				REED FOWLER	12/01/2023
Stress	Unknown/Not Performed				REED FOWLER	12/01/2023
Transportation Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Unemployment	Unknown/Not Performed				REED FOWLER	12/01/2023

Which Risk Factors display in any given patient's chart depend on the patient's age, sex, and how the practice has set up the Risk Assessment tool. See Risk Assessment Editor below.

## Risk Status and Historical Data

A patient's risk factors can change over time. For example, a patient might go from Unknown Lead Exposure to High Risk to Low Risk again. The visible Status is the **current/most recent Status**. But to see how a patient's risk factors have changed, click the **button** (expand) at the left:

NEW TESTPATIENT (7269) | Enc: NEWBORN TESTPATIENT (7269) |  Flag as incomplete

**Risk Assessment** |  Mark Reviewed |  show all risk factors |  expand grid

Risk Factor	Status	Notes	Goals	Pert	PL	Created By	Status Date
Second hand smoke	No exposure at home			<input type="checkbox"/>	<input checked="" type="checkbox"/>	REED FOWLER	12/01/2023
Lead exposure	Unknown			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	10/30/2019
Tuberculosis	Not at risk			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Oral health	Unknown			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	10/30/2019
Food Insecurity	Positive Screening for Food Insecurity		Feels food intake quantity is adequate for snacks (finding)	<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Health Literacy	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	10/30/2019
Housing Insecurity	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Financial Insecurity	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Health Insurance Coverage	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Intimate Partner Violence	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Material Hardship	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Medical Cost	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Social Connection	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Stress	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Transportation Insecurity	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023
Unemployment	Unknown/Not Performed			<input type="checkbox"/>	<input type="checkbox"/>	REED FOWLER	12/01/2023

Underneath, you can see **historical data** for a given Risk Factor, as well as the **date** on which a change was made and **who** made the change.

- In the example below, the current status of Second hand smoke is No exposure at home, which user Reed Fowler set as current on 12/1/23. But prior to that, the risk status was Unknown, and it had been Unknown since user Reed Fowler first opened the chart on 10/30/2019:

ESTPATIENT (7269) |  Mark Reviewed |  show all risk factors |  expand grid

Risk Factor	Status	Notes	Goals	PL	Created By	Status Date
Second hand smoke	No exposure at home			<input checked="" type="checkbox"/>	REED FOWLER	12/01/2023
	Unknown					REED FOWLER   10/30/2019
Lead exposure	Unknown				REED FOWLER	10/30/2019
Tuberculosis	Not at risk				REED FOWLER	12/01/2023
	Unknown					REED FOWLER   10/30/2019
Oral health	Unknown				REED FOWLER	10/30/2019
Food Insecurity	Unknown/Not Performed				REED FOWLER	10/30/2019
Health Literacy	Unknown/Not Performed				REED FOWLER	10/30/2019
Housing Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Financial Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Insurance Coverage	Unknown/Not Performed				REED FOWLER	12/01/2023
Intimate Partner Violence	Unknown/Not Performed				REED FOWLER	12/01/2023
Material Hardship	Unknown/Not Performed				REED FOWLER	12/01/2023
Medical Cost	Unknown/Not Performed				REED FOWLER	12/01/2023
Social Connection	Unknown/Not Performed				REED FOWLER	12/01/2023
Stress	Unknown/Not Performed				REED FOWLER	12/01/2023
Transportation Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Unemployment	Unknown/Not Performed				REED FOWLER	12/01/2023

Note that a user might flip a Status of a risk factor several times during a calendar day, during the process of editing. Therefore, **historical changes only appear if they existed for at least one calendar day**

- For example, let's say a user opens a chart with a status of High Risk. The user changes the status to Status Low Risk that day, and then, before the day is over, changes the status to Medium Risk. Because the Low Risk status was not in place for an entire calendar day -- just a few minutes or hours -- the Low Risk status will not appear in the historical area. The current status will now be Medium Risk, and the only historical status visible will be the prior High Risk status.

## Goals

Some Risk Factors have a menu of target **Goals** associated with them. The clinician and patient may set goals for certain risk factors, and the goals can be documented here. Goals may be set **irrespective of the Risk Factor status** that is, even a patient who is Not at risk or Low risk for a risk factor may have Goals documented.

Risk Factor	Status	Notes	Goals	PL	Created By	Status Date
Second hand smoke	No exposure at home				REED FOWLER	12/01/2023
Lead exposure	Unknown				REED FOWLER	12/01/2023
Tuberculosis	Not at risk				REED FOWLER	12/01/2023
Oral health	Low risk				REED FOWLER	12/01/2023
Food insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Literacy	Unknown/Not Performed				REED FOWLER	12/01/2023
Housing Insecurity	Negative Screen for Housing Insecurity	Can free text here any relevant info	Adequate equipment for safe food storage in residence (finding)		REED FOWLER	12/01/2023
Financial Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Insurance Coverage	Unknown/Not Performed				REED FOWLER	12/01/2023
Intimate Partner Violence	Unknown/Not Performed				REED FOWLER	12/01/2023
Material Hardship	Unknown/Not Performed				REED FOWLER	12/01/2023
Medical Cost	Unknown/Not Performed				REED FOWLER	12/01/2023
Social Connection	Unknown/Not Performed				REED FOWLER	12/01/2023
Stress	Unknown/Not Performed				REED FOWLER	12/01/2023
Transportation Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Unemployment	Unknown/Not Performed				REED FOWLER	12/01/2023

Specific goals may be accessed via dropdown by clicking the **ellipsis button** found on the right side of the Goals column (see above image). The user may click **any** or **all** of the **options listed**, as appropriate. These options are fixed, based on USCDI version 2 value set definitions **new USCDI v2 requirements** but individual users may still **free text customized information into the Notes field**.

Risk Factor	Status	Notes	Goals	PL	Created By	Status Date
Second hand smoke	No exposure at home				REED FOWLER	12/01/2023
Lead exposure	Unknown				REED FOWLER	12/01/2023
Tuberculosis	Not at risk				REED FOWLER	12/01/2023
Oral health	Low risk				REED FOWLER	12/01/2023
Food insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Literacy	Unknown/Not Performed				REED FOWLER	12/01/2023
Housing Insecurity	Positive Screen for Housing Insecurity				REED FOWLER	12/01/2023
Financial Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Health Insurance Coverage	Unknown/Not Performed				REED FOWLER	12/01/2023
Intimate Partner Violence	Unknown/Not Performed				REED FOWLER	12/01/2023
Material Hardship	Unknown/Not Performed				REED FOWLER	12/01/2023
Medical Cost	Unknown/Not Performed				REED FOWLER	12/01/2023
Social Connection	Unknown/Not Performed				REED FOWLER	12/01/2023
Stress	Unknown/Not Performed				REED FOWLER	12/01/2023
Transportation Insecurity	Unknown/Not Performed				REED FOWLER	12/01/2023
Unemployment	Unknown/Not Performed				REED FOWLER	12/01/2023

Prior Goals and Notes are also trackable in **historical Risk Factor +** dropdowns, as described above.

## Risk Assessment Editor

A practice can customize their Risk Assessment tool in **Clinical > More > Risk Assessments**. Here are the three panels available in the Risk Assessment Editor setup screen:

Risk Question	Privacy	Sort Order	Sex	Min Age (months)	Max Age (months)	DX Code	DX Code Type	Risk Group	SDOH	Archived
Second hand smoke	Any staff member	2	Both	0		39243-1	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Lead exposure	Any staff member	3	Both	9	72	39193-9	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Tuberculosis	Any staff member	4	Both	1		39209-2	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Oral health	Any staff member	5	Both	6		39174-8	LOINC	Behavioral	<input type="checkbox"/>	<input type="checkbox"/>
Food Insecurity	Any staff member	11	Both	0		88124-3	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Literacy	Any staff member	12	Both	0		95866-0	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Housing Insecurity	Any staff member	13	Both	0		99550-6	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Education	Any staff member	14	Both	216		82589-3	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Elder Abuse	Any staff member	15	Both	216		100307-8	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Financial Insecurity	Any staff member	16	Both	0		83335-0	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Insurance Coverage	Any staff member	17	Both	0		63513-6	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Intimate Partner Violence	Clinical staff only	18	Both	0		76503-2	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Material Hardship	Any staff member	19	Both	0		76513-1	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Answer	Answer Code	Risk Level	Sort Order	DX Description	SNOMED	DX Code Type
Unknown/Not Performed	U	Unknown	1			
Positive for Health Insurance Coverage Concerns	P	High	2			
Negative for Health Insurance Coverage Concerns	N	Low	3			

Goal	DX Code Type	DX Code	Sort Order
Enrolled in Children's Health Insurance Program (finding)	SNOMED	671191000124109	1
Enrolled in Department of Veterans Affairs health insurance coverage (finding)	SNOMED	432681000124109	2
Enrolled in employee group health insurance coverage (finding)	SNOMED	432691000124107	3
Enrolled in Indian Health Service coverage (finding)	SNOMED	671181000124106	4
Enrolled in Medicaid health insurance coverage (finding)	SNOMED	433641000124108	5
Enrolled in Medicare advantage health insurance coverage (finding)	SNOMED	433651000124105	6
Enrolled in Medicare drug plan (finding)	SNOMED	671231000124104	7
Enrolled in Medicare health insurance coverage (finding)	SNOMED	433661000124107	8
Enrolled in Medigap health insurance (finding)	SNOMED	671251000124106	9
Enrolled in Tricare health insurance (finding)	SNOMED	671241000124109	10
Private health insurance held (finding)	SNOMED	185952002	11

Top Panel

Middle Panel

Bottom Panel

### Top Panel - Risk Assessment Editor

In the **Top Panel**, a user can assess what risk assessments the practice wants to track ("Risk Questions"), along as set sex and age specifications, and any applicable SNOMEDs, ICDs, or LOINC.

- Several **new SDOH** have been added as part of OP 21.3.45, including **health insurance coverage, intimate partner violence, unemployment, medical cost, and stress**. These items have been marked with a **Privacy level** of Any staff member, except for Intimate Partner Violence, which is marked as Clinical staff only.
- Note that some items (colored grey) are **not editable**; these are part of OP's **required minimum reporting** and cannot be amended so that certain EMR-required elements do not "break." If you have a good use case for changing a greyed-out element, see **Adding Risk Items**, below.
- If a practice does not want to see any particular Risk Question in its patients' Risk Assessment screen, the practice may click the **Archived** button on the right side of the screen to hide the Risk Question from all charts. In order to see previously archived Risk Questions, the user can check the **Include archived checkbox** at the top of the window.

Risk Question	Privacy	Sort Order	Sex	Min Age (months)	Max Age (months)	DX Code	DX Code Type	Risk Group	SDOH	Archived
Second hand smoke	Any staff member	2	Both	0		39243-1	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Lead exposure	Any staff member	3	Both	9	72	39193-9	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Tuberculosis	Any staff member	4	Both	1		39209-2	LOINC	Environmental	<input type="checkbox"/>	<input type="checkbox"/>
Oral health	Any staff member	5	Both	6		39174-8	LOINC	Behavioral	<input type="checkbox"/>	<input type="checkbox"/>
Food Insecurity	Any staff member	11	Both	0		88124-3	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Literacy	Any staff member	12	Both	0		95866-0	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Housing Insecurity	Any staff member	13	Both	0		99550-6	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Education	Any staff member	14	Both	216		82589-3	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Elder Abuse	Any staff member	15	Both	216		100307-8	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Financial Insecurity	Any staff member	16	Both	0		83335-0	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Health Insurance Coverage	Any staff member	17	Both	0		63513-6	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Intimate Partner Violence	Clinical staff only	18	Both	0		76503-2	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Material Hardship	Any staff member	19	Both	0		76513-1	LOINC	Not classified	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Top Panel

### Middle Panel - Risk Assessment Editor

In the **Middle Panel**, the user can see specific dropdown choices, or Risk **Answers**, for each risk assessment item, and how they are coded.

- If the user created the Risk Question, the user can also add/edit the Risk Answers found here.
- Adding SNOMEDs or LOINC codes may help your practice with quality reporting, but is not required.

Answer	Answer Code	Risk Level	Sort Order	DX Description	SNOMED	DX Code Type
Unknown/Not Performed	U	Unknown	1			
Positive for Health Insurance Coverage Concerns	P	High	2			
Negative for Health Insurance Coverage Concerns	N	Low	3			

Middle Panel

### Bottom Panel - Risk Assessment Editor

Finally, the **Bottom Panel** contains **Goals** options for that particular Risk Question. A user can choose specific Goals as needed for a particular patient in the patient's Risk Assessment window, as described above.

Goal	DX Code Type	DX Code	Sort Order
Enrolled in Children's Health Insurance Program (Finding)	SNOMED	671191000124109	1
Enrolled in Department of Veterans Affairs health insurance coverage (Finding)	SNOMED	432681000124109	2
Enrolled in employee group health insurance coverage (Finding)	SNOMED	432691000124107	3
Enrolled in Indian Health Service coverage (Finding)	SNOMED	671181000124106	4
Enrolled in Medicaid health insurance coverage (Finding)	SNOMED	433641000124108	5
Enrolled in Medicare advantage health insurance coverage (Finding)	SNOMED	433651000124105	6
Enrolled in Medicare drug plan (Finding)	SNOMED	671231000124104	7
Enrolled in Medicare health insurance coverage (Finding)	SNOMED	433661000124107	8
Enrolled in Medigap health insurance (Finding)	SNOMED	671251000124106	9
Enrolled in Tricare health insurance (Finding)	SNOMED	671241000124109	10
Private health insurance held (Finding)	SNOMED	185952002	11

Bottom Panel

## Adding or Editing Risk Items

Basic instructions for customizing the Risk Assessment tool can be found at [Add Risk Questions and Responses](#).

In some cases, a practice might need to alter or edit an existing risk question, risk answer, or risk goal set. User-created questions, answers, and goals are always editable. If a practice needs to alter a greyed-out Risk Factor, the practice should create their own "cloned" copy of the Risk Question and Risk Answer set, then archive the original unalterable risk question.

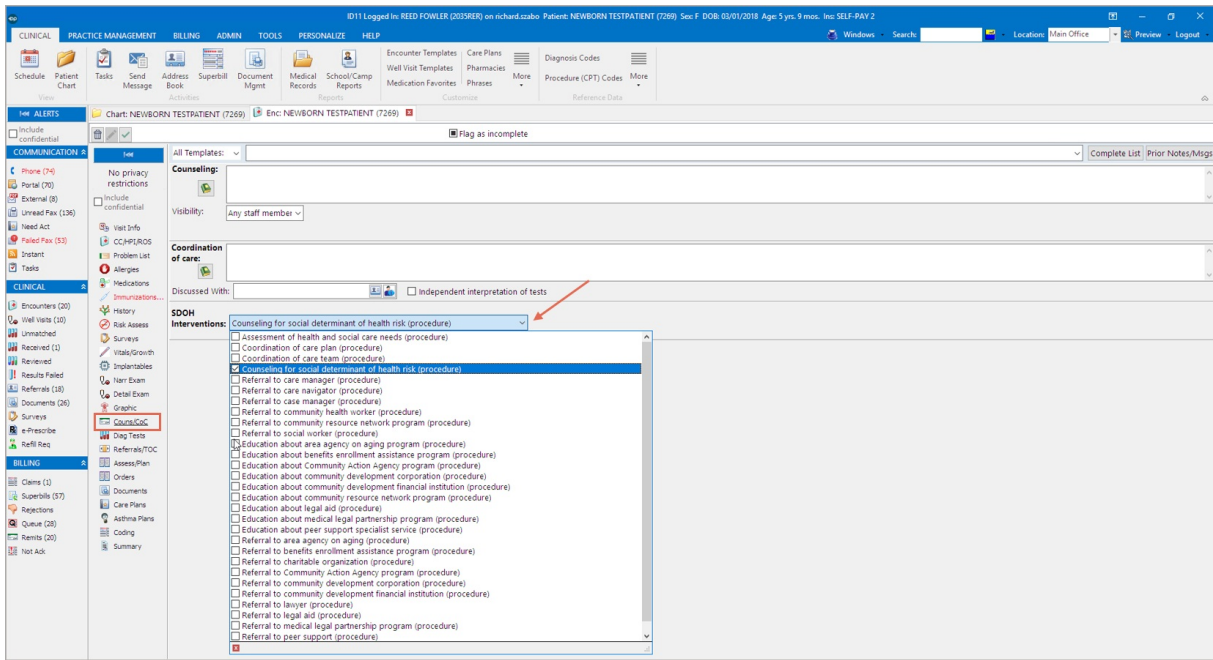
## Social Determinants Interventions During Visits

Sometimes, as part of a visit, a clinician might institute interventions for particular risk factors. For example,

- A patient who has been screened for food insecurity and is positive might get a referral to the local food bank.
- The family of a patient with complex medical needs might be referred to a local nonprofit respite care service.

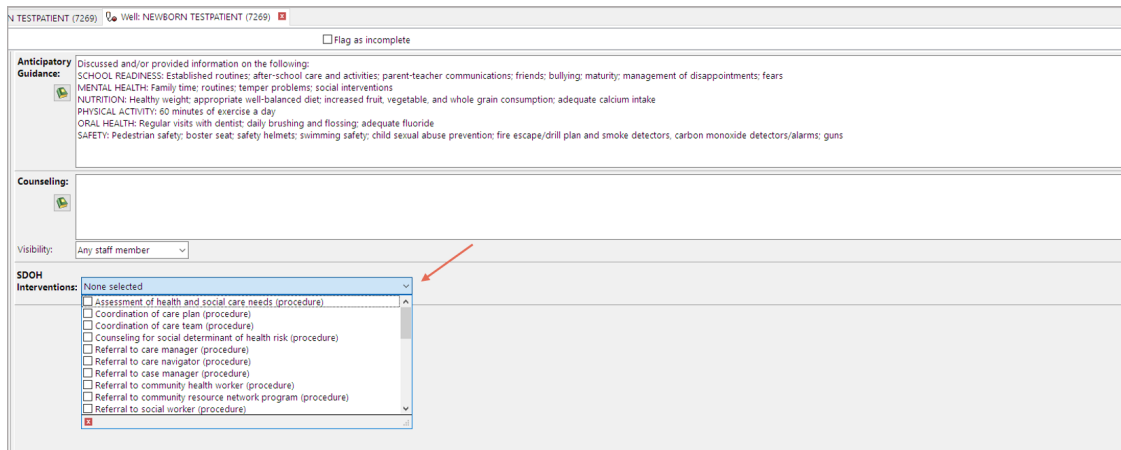
### Encounter Note

In an **Encounter Note**, a practice can enter SDOH interventions in a structured way from the SDOH Interventions dropdown in the **Couns/CoC** tab:



## Well Visit Note

In **Well Visit Notes**, the parallel location for documenting SDOH interventions is in the **AG/Counseling** tab:



The list of dropdowns is not exhaustive and is predetermined by the **USCDI version 2 requirements**. That said, if a clinician wants to free-text additional information about the intervention or referral, he/she may do so in the Counseling field above the SDOH Interventions dropdown.

## Note Summary - Include Risk Assessment and SDOH Interventions

To have the Risk Assessments and SDOH interventions both appear in **Note Summaries**:

1. Navigate to **Report Criteria**.
2. Select the **Risk assessment** (shows Risk Assessments) and **Counseling** (shows SDOH interventions) checkboxes.

Report Group Name	Notes	Owner
Click here to add a new criteria set		
-Encounter Note	Standard encounter note	48F824E5, DD7482F
-Event Chronology, ALL	Event Chronology, all patient records	48F824E5, DD7482F
2011 PCMH ADD/ADHD	Encounters for ADD	Wiggin, Demosther
2011 PCMH eczema	Encounters for eczema	Wiggin, Demosther
Audit Report Note	Audit Report Note that excludes confidential inf	User, Administrative
CPT coding summary	List of CPTs for visits	Wiggin, Demosther
Chart Note Review	Generate and print chart note problem review	
Copy of Vitals Only	Copy of Vitals Only	FOWLER, REED
Diagnostic Test Result	Individual diagnostic test	Wiggin, Demosther
Encounter Dx List	Lists all ICD of visits/dates	Wiggin, Demosther

Report Options	Report Sections	Encounter Sections	Encounter Section Names	Demographics	Formatting
<input type="checkbox"/> All <input checked="" type="checkbox"/> Patient Demographics <input checked="" type="checkbox"/> Visit Information (date/location) <input checked="" type="checkbox"/> Chief Complaint / Interval History <input checked="" type="checkbox"/> History of Present Illness <input checked="" type="checkbox"/> Review of Systems <input checked="" type="checkbox"/> Include negative ROS findings <input checked="" type="checkbox"/> Personal/Family/Social History <input checked="" type="checkbox"/> Advanced directives <input checked="" type="checkbox"/> Risk assessment <input checked="" type="checkbox"/> Surveys <input checked="" type="checkbox"/> Include detailed questions/answers <input checked="" type="checkbox"/> Vital Signs <input checked="" type="checkbox"/> Examination <input checked="" type="checkbox"/> Include normal exam findings <input checked="" type="checkbox"/> Include school exam findings (well visits)					
<input checked="" type="checkbox"/> Assessment/Medical Decision Making <input checked="" type="checkbox"/> Counseling <input checked="" type="checkbox"/> Plan <input checked="" type="checkbox"/> Patient Instructions <input checked="" type="checkbox"/> Medications <input checked="" type="checkbox"/> Diagnostic Tests <input checked="" type="checkbox"/> Checklist Tasks <input checked="" type="checkbox"/> Coordination of Care <input checked="" type="checkbox"/> Care Plans / Goals <input checked="" type="checkbox"/> Followup <input checked="" type="checkbox"/> Procedures <input checked="" type="checkbox"/> Providers <input checked="" type="checkbox"/> Addenda <input checked="" type="checkbox"/> Coding / Audit Support					

Risk Assessment items appear under the **Risk Assessment** header, and **SDOH Interventions** appear as a subheader under the **Counseling** header:

Summary Report Criteria  
 --Encounter Note Edit Criteria Rebuild Summary Print Note Print Letter CDA  
 Include records/sections with limited visibility (EFR) Search: Note ID: 81149

Primary Encounter Note Patient Exit Note Alternate Notes

**Patient:** Name: NEWBORN TESTPATIENT  
 Date of birth: 03/01/2018 Sex: F  
 Language: Unknown  
 Race: Unknown  
 Ethnicity: Unknown

**Visit Info:** Date/time: 12/01/2023 @ 02:49 pm  
 Location: Main Office

**CC/HPI:**  
 test

**Risk Assessment:**  
 Smoking status: assessed  
 Second hand smoke: No exposure at home  
 Tuberculosis: Not at risk

**Counseling:**  
**SDOH Interventions:**  
 Counseling for social determinant of health risk (procedure)  
 Referral to community resource network program (procedure)  
 Education about Community Action Agency program (procedure)

**Encounter Disposition:**  
 Disposition: Home

**Care Plan:** •pediatric preventive health management - test

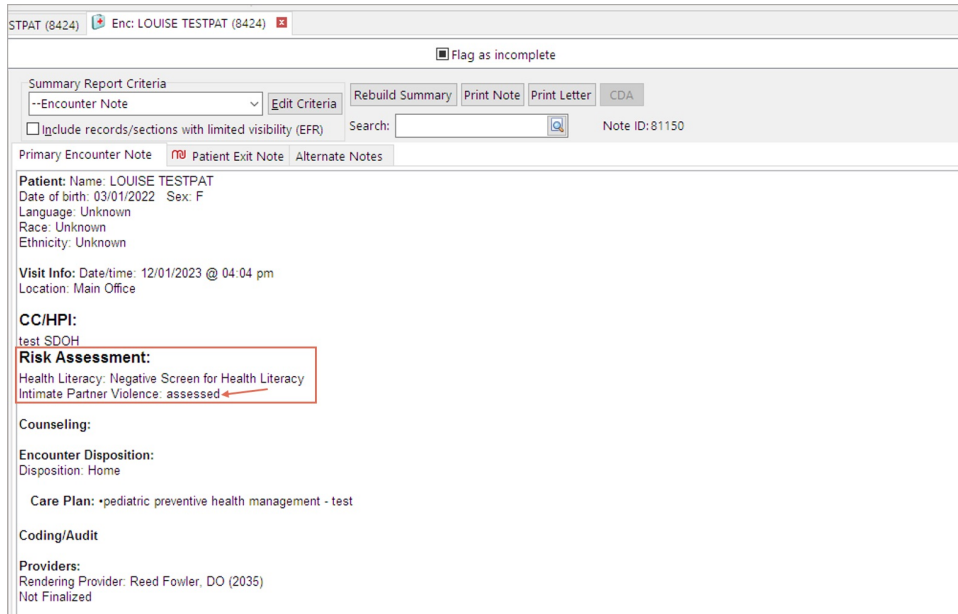
**Coding/Audit**

**Providers:**  
 Rendering Provider: Reed Fowler, DO (2035)  
 Not Finalized

**Finalize** Note visibility: Any staff membe Clinical Note Type: Progress Note Disposition: Home  
 Finalized by: Additional info:  
**Cosign** Cosigned by:  
 Save Template Reviewed by:

**Notes:** Risk Questions in Note Summary

- Only Risk Questions for which the **Risk Answer have changed** appear in the **Risk Assessment** section.
  - This means that clicking the Mark Reviewed button in a patient's Risk Assessment does not cause the entire list of reviewed Risk Questions to appear here.
- Risk Questions with a **privacy level of Clinical staff or higher** will show that they were **assessed**, but the specific Risk Answer will not show.
  - For example, this is how a patient whose **Intimate Partner Violence** screen was marked positive would show in the summary (and only if the Risk Assessment checkbox in Report Criteria was checked, as described above):



STPAT (8424) Enc: LOUISE TESTPAT (8424)

Flag as incomplete

Summary Report Criteria  
 --Encounter Note Edit Criteria Rebuild Summary Print Note Print Letter CDA

Include records/sections with limited visibility (EFR) Search: Note ID: 81150

Primary Encounter Note Patient Exit Note Alternate Notes

**Patient:** Name: LOUISE TESTPAT  
 Date of birth: 03/01/2022 Sex: F  
 Language: Unknown  
 Race: Unknown  
 Ethnicity: Unknown

**Visit Info:** Date/time: 12/01/2023 @ 04:04 pm  
 Location: Main Office

**CC/HPI:**  
 test\_SDOH

**Risk Assessment:**  
 Health Literacy: Negative Screen for Health Literacy  
 Intimate Partner Violence: assessed

**Counseling:**

**Encounter Disposition:**  
 Disposition: Home

**Care Plan:** •pediatric preventive health management - test

**Coding/Audit**

**Providers:**  
 Rendering Provider: Reed Fowler, DO (2035)  
 Not Finalized

