

WA Health Datix Consumer Feedback Module (CFM)

Recommendations/Actions User Guide

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Disclaimer

All information and content in this material is provided in good faith by the Department of Health. Western Australia, and is based on sources believed to be reliable and accurate at the time of development. Due to changing system configurations, information provided in this User Guide may not be accurate at the time of reading and is only accurate as at the date of publication.

Please address any quality improvement suggestions to PSSU@health.wa.gov.au

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WA Health Datix CFM

The WA Health Datix Consumer Feedback Module (CFM) is a web-enabled module that has functions to allow electronic recording and reporting of consumer feedback as well as management of consumer complaints.

Consumer Complaints, Contacts and Concerns, and Compliments are entered into the WA Health Datix CFM by the notifier using the WA Health Datix CFM online feedback notification form.

About this Guide

- 1. In this guide, the web-based Datix application, available to all WA Health staff, is referred to as *DatixWeb*.
- 2. For clarity, the following font formatting has been used:
 - Lavender functions, menu items and buttons in DatixWeb.
 - Indigo hyperlinks to sections within this user guide.
 - <u>Teal</u> web and email addresses.
- 3. Points to note are depicted in a box:



Accessing WA Health Datix CIMS



Security access

There is an interrelationship between user profiles for the Datix CFM and the Datix Clinical Incident Management System (CIMS). Queries in the first instance should be directed to site SQP staff and escalated to CIMS Support at Health Support Services if necessary.

User profiles need to be assigned to individual users of the system. Group email addresses should not be used.

Datix CFM Profile	Security access description
Feedback Notifier	Have permission to input/notify data into both CFM and CIMS and read only access for records that they have notified.
Feedback Coordinator	Have read/write access to input data, apply recommendations/ actions, access to assign to or be assigned to, analyse data and create reports, access to Dashboard and To Do List and can nominate investigators for that particular Health Service/Service/ Service Division. Feedback Coordinators have access at a particular Health Service/Service/Service Division or for a CFM record at any other location which they are nominated as Feedback Coordinator. Read only access to CIMS records at their location. Read only access to Contacts module.
Feedback Coordinator with Email Notification	As above with email notification when CFM record is submitted to their location.
Feedback Investigator	Have read/write access to CFM records they are invited to comment on and read only for lodged records in the same location, analyse data and create reports, access to Dashboard and To Do List for that particular Health Service/Service/Service Division. Read only access to CIMS records they have notified.
Senior Staff	Have read/write access to CIMS and Recommendations both at their location and assigned to them. Also have read/write access to CFM records both at their location and assigned to them. Access to Dashboard, To Do list and reporting. Read only access to Contacts module.
Senior Staff - CIMS	Have read/write access to CIMS and Recommendations both at their location and assigned to them. Also have read only access to CFM records at their location and read/write access when assigned to them. Access to Dashboard, To Do list and reporting. Read only access to Contacts module.
Third Party	Have access to add Third Party comments to both CIMS and CFM records when invited. Can view and complete Recommendations

	assigned to them. Access to Dashboard, To Do list and reporting. Read only access to CIMS records they have notified.
Head of Department	Have read/write access to CIMS and Recommendations both at their location and assigned to them.
	Also have read/write access to CFM records both at their location and assigned to them.
	Access to Dashboard, To Do list and reporting.
	Read only access to Contacts module.
Head of Department with Email Notification	As above with e-mail notification when CFM record is submitted to their location.
SQ&P	Have read/write access to CIMS and Recommendations both at their location and assigned to them.
	Also have read/write access to CFM records both at their location and assigned to them.
	Access to Dashboard, To Do list and reporting.
	Read only access to Contacts module.
SQ&P with Email Notification	As above with e-mail notification when CFM record is submitted to their location.

Logging into WA Health Datix CFM

To log in click on "Login to Datix CIMS (User Identified)". The log in box will then appear. Use your HE number and computer password to log in to the system.

New Clinical Incident For	m (Anonymous) 🕴 Login to Datix CIMS (User Identi	fied)	•
Login to Datix CIN	45		
🐣 Login to	Datix CIMS		
Sector Login to	Datix Clivis		
HE Number			
	,		
Password			
, aconora			
Domain	hdwa 🗸		
	Login		
Ltd 2016		📃 🚺 Datix	Č

Logging out

To Log out of Datix CIMS, select the logout option at the top of the screen. Any unsaved work will be lost.

To Do List My Dashboard Recommend	ations/Actions Contacts Admin	Logout
Clinical Incident Management System 👒	Consumer Feedback Module 💙	

WA Health Datix CFM Status Screen

Once logged in, click the 'Consumer Feedback Module' at the top of the screen:

To Do List My Dashboard Recommenda	ations/Actions Contacts Admin Logout	
Clinical Incident Management System 🔻	Consumer Feedback Module 💙	

The CFM landing page is pictured below, consisting of two navigation menus: 'Options' and 'Statuses'. The 'Options' menu displays different actions a user can perform. The 'Statuses' menu displays a count of feedback records that have been reported and their workflow status. A listing of all records in each status can be viewed by clicking the status name or the adjacent number of records.

Consumer Feedback Module					
Options	Statuses				
Add a new consumer feedback	New Feedback	4 records			
My reports	Complaints awaiting acknowledgement	3 records	3 Overdue		
New search	Complaints under investigation	1 records	1 Overdue		
E Saved queries	Complaints awaiting final reply	1 records	1 Overdue		
Image: Weip manual state of the state of	Closed Feedback	2 records			
	■ Inactive	26 records			

Alternatively those complaint records at a particular status which have overdue elements can be viewed by clicking the number of records displayed as 'Overdue'. As the 'Overdue' label is dependent on correct dates existing in the 'Primary Complainant Chain', these prompts should only be relied upon if the site is confident that their 'Primary Complainant Chain' dates are correct. This is further detailed in the WA Health Datix CFM Coordinator User Guide.

<u>Options</u>	<u>Statuses</u>		
Add a new consumer feedback – click here to open a blank Feedback Notification Form to report a new consumer feedback.	New Feedback – Complaints that have been notified but are in 'Pending' status and all open Compliments or Contacts.		
My reports – click here to access the standard report suite.	Complaints awaiting acknowledgement – Complaints that are lodged and awaiting acknowledgment to be sent to the complainant by the Feedback Coordinator		
Design a report – click here to access individual design report suite.	Complaints under investigation – Complaints that		
New search – click here to search for information within the CFM database.	investigators.		
Saved queries – click here to access previously saved queries.	Complaints awaiting final reply – Complaints with completed investigation/s that are awaiting final communication with complainant.		
Help – click here to access online help information.	Closed feedback – Complaints, Compliments or Contacts that are closed.		
Please note that some of these options are available only to those who have been assigned certain authorised security access, e.g. design a report.	Inactive – Complaints, Compliments or Contacts that are NOT deemed to fall under the feedback module's model e.g. duplicate entries, erroneously entered data or staff feedback.		

The Recommendations/Actions module

The Recommendations/Actions module is a module within Datix that is shared between Datix CFM and Datix CIMS. It can be accessed directly once logged in to Datix by selecting 'Recommendations/Actions' at the top of the screen.

To Do List My Dashboard	Recommend	lations/Actions	Contacts Ad	min Logout
Clinical Incident Management	System 🗸	Consumer Fee	dback Module 🔻	

Recommendations/actions are created from within a CFM or CIMS record. Once created, individual recommendations/actions are linked within the system to the relevant CFM or CIMS record. Searching and reporting on recommendations/actions is done in the Recommendations/Actions module.

General navigation information and Datix features

Common fields and icons

A number of features are common to many areas of the WA Health Datix CFM

Item	Item title	Description
*	Mandatory Field	This indicates the field is mandatory and you are required to complete it prior to saving or submitting the form.
	Date field	Open the calendar to select a date or type in the date using dd/mm/yyyy.
	Pick list	Type the first few letters of the required value and the pick list will generate a list of possible matches to select from. Alternatively click the arrow and scroll through the alphabetical list provided.
AC	Free text field	Type text in to this field. Spell check function is available.
Add Another	Add another	Click on this to add an identical section without copying content.
Copy Subject	Copy subject	Click on this to add an identical section with content copied.
Clear Section	Clear section	This enables the section within the form to be cleared of all entered data.
ABC	Spell check	Click to check your spelling.
	Pencil	Click to close spell check and return to entering text.
HelpHelp	Help Icons	Click to display additional information. Please note this may be general Datix help that is not specific to the WA Health system configuration.
00	Round Radio Buttons	Round radio buttons allow a single selection only.

Item	Item title	Description
	Square Tick Boxes	Square tick box buttons allow multiple selections
	Delete	In a multi-select field, where more than one option can be chosen, highlight selected item, click icon to remove the selected value(s).
Browse	Browse	Allows the selection of documentation to be attached.
	Floating menu	Floating menu located at the bottom left of screen with Menu, Save/Submit or Search and Cancel functions.
Save Submit	Save/Submit	Save/Submit button located at the bottom of the 'Feedback notification form' or in floating menu (bottom left of page)
Search	Search	This allows a 'search' of the data to be conducted
Cancel	Cancel	The cancel function located at the bottom of the forms or in the floating menu (bottom left of page)

Timeout Feature

In order to maintain system security, the WA Health Datix CIMS will automatically end a session if it has been inactive for five minutes. Once the time limit has been reached, a message will appear on the screen advising that the session will be ended unless the option to 'Extend session' is selected.

Alert [x]
Your session has been inactive for more than 5 minutes. For your security, your connection will be logged out if there is no activity after one further minute.
If you do not wish to be logged out, click 'Extend session' and your session will be extended for a further 5 minutes.
Seconds remaining: 60
Extend session Log out

Creating new Recommendations/Actions

The development of recommendations/actions is a fundamental component in consumer feedback management and provides the framework for quality improvement in a health care service. Recommendations/actions can be entered for open or closed complaints, however not every complaint will generate a recommendation/action.

To add a recommendation/action, open the relevant complaint record in the 'Consumer Feedback Module' and from the 'Feedback Management Form' menu select 'Actions'. To generate a new action, click 'Create a new action'.

Feedback overview	Actions
People Involved	
Extra Demographic Details	No actions
Issues	Create a new action
Investigation Findings	Action chains
Third Party Comment	No action chains
Actions	
Delay in Complaint Response	Save Cancel
Progress notes	

You will be taken to a 'Complaints Recommendation/Action Form' as shown below.

Reference Reference Location Module I Lot all recommendations 83895 B /v reports Recommendation /Action ID Verse search Recommendation /Action Details B /v reports * Recommendation detail @ P Heip Recommendation /Action Details * Recommendation /Action tube	Complaints Recomm	nendation/Action Form		
Localion I List al recommendations B three rec 26 wordse Actions B three rec 26 wordse Actions P beigin a report P beigin a report <t< td=""><td>Reference</td><td>Reference</td><td></td><td></td></t<>	Reference	Reference		
Elst al recommendations There are 26 overdue Actions Bit hyrepots Velosigin a repot Velosigin	Location	Module		
By thy reports > Design a report > New search B Saved queries ? Help Recommendation/Action Details * Recommendation title Recommendation detail Recommendation/Action type What will be measured / what will your outcome be? What will be measured / what will your outcome be? * Assigned To * Start date (dd/MM/yyyr) Due date (dd/MM/yyyr) Complete date (dd/MM/yyyr) Complete date (dd/MM/yyyr) Describe the action that was completed	∷ List all recommendations ∷ There are 26 overdue Actions	Linked record ID	83895	
Recommendation/Action Details * Recommendation title B saved queries ? Help Recommendation detail Recommendation Action type What will be measured / what will your outcome be? What will be measured / what will your outcome be? * Assigned To Key dates * Start date (dd/MM/yyyy) * Start date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Recribe the action that was completed	My reports	Recommendation/Action ID		
* Recommendation title ? Help Recommendation detail Recommendation detail Recommendation/Action type What will be measured / what will your outcome be? What will be measured / what will your outcome be? * Assigned To * Assigned To * Start date (dd/MM/yyyy) * Due date (dd/MM/yyyy) * Due date (dd/MM/yyyy) * Complete date (dd/MM/yyyy) * Action details	Design a report Design a report	Recommendation/Action Details		
? Heip Recommendation detail @ Recommendation/Action type Image: Commendation/Action type What will be measured / what will your outcome be? Image: Commendation/Action type * Assigned To Image: Commendation/Action Key dates Image: Complete date (dd/MM/yyyy) * Start date (dd/MM/yyyy) Image: Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Image: Complete date (dd/MM/yyy) Action details Describe the action that was completed	Saved queries	* Recommendation title		
Recommendation/Action type What will be measured / what will your outcome be? * Assigned To * Assigned To * Start date (dd/MM/yyyy) 22/12/2020 * Due date (dd/MM/yyyy) 22/12/2020 * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) * Ction details Describe the action that was completed	? Help	Recommendation detail 🚱		~
Recommendation/Action type What will be measured / what will your outcome be? * Assigned To * Assigned To Key dates * Start date (dd/MM/yyyy) 22/12/2020 * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Escribe the action that was completed				
Recommendation/Action type What will be measured / what will your outcome be? * Assigned To * Assigned To * Start date (dd/MM/yyyy) \$ Start date (dd/MM/yyyy) * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Action details Describe the action that was completed				ape .
What will be measured / what will your outcome be? * Assigned To * Assigned To * Cey dates * Start date (dd/MM/yyyy) * Start date (dd/MM/yyyy) * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Eescribe the action that was completed		Recommendation/Action type		
* Assigned To * Assigned To Cey dates * Start date (dd/MM/yyyy) * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Action details Describe the action that was completed		What will be measured / what will your outcome be?		^
* Assigned To Key dates * Start date (dd/MM/yyyy) * Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Action details Describe the action that was completed				~ 🔶
Key dates Start date (dd/MM/yyyy) bue date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Describe the action that was completed		* Assigned To		
* Start date (dd/MM/yyyy) 22/12/2020 * Due date (dd/MM/yyyy) Image: Complete date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Image: Complete date (dd/MM/yyyy) Action details Describe the action that was completed		Key dates		
* Due date (dd/MM/yyyy) Complete date (dd/MM/yyyy) Action details Describe the action that was completed		★ Start date (dd/MM/yyyy)	22/12/2020	
Complete date (dd/MM/yyyy) Action details Describe the action that was completed		★ Due date (dd/MM/yyyy)		
Action details Describe the action that was completed		Complete date (dd/MM/yyyy)		
Describe the action that was completed		Action details		
		Describe the action that was completed		~
				~ _{abs}
Submit action Cancel			Submit action Cancel	

Fields completed at creation of a new recommendation/action

Recommendation title

The 'Recommendation title' is a brief description of the recommendation/action. It allows users to quickly identify recommendations/actions on their 'To Do List' and in reports.

Recommendation detail

The 'Recommendation detail' free-text section should provide enough detail for a user to understand what the recommendation/action is and how it relates to the consumer feedback. It should also provide detail on how it is proposed that the recommendation/action will be implemented and what evidence will be provided. Do not use abbreviations, patient or staff names.

Recommendation/Action type

Select the 'Recommendation/Action type' that best describes the recommendation/action as described in the 'Recommendation detail'.

Recommendation/Action type	•	
	Duties modified	~
	No further action required	
	Policy written or modified	
	Procedure/practice modified	
	Quality improvement activity, including risk management initiatives and system- wide changes initiated	
	Recommendations are made to a relevant manager	
	Staff member/contractor counselled and/or offered performance support and development in accordance with local policy	
	Training/education of staff provided	~

Note: The recommendation type 'Recommendation written in error' is not intended to be selected as a 'Recommendation type' at the creation of a recommendation and is included in this list to enable recommendations/actions that have already been saved in error to be made "inactive". See page 22.

What will be measured/what will your outcome be?

Once the above recommendation/action has been implemented, what are you hoping to have changed? The outcome should go further than implementation itself. For example, if the recommendation/action is to implement a new menu, the outcome to be measured should be not only that the menu is in place, but that customer satisfaction with the menu is improved as a result of the new menu.

Assigned To

The 'Assigned To' field can be a WA Health employee with Datix CFM profile permissions. Assigning an employee here provides permission for the nominated user to read the recommendation/action and provide comment. The recommendation/action will also appear on their 'To Do List'.

Start date

The start date auto-populates with the date the action is generated in the system. This can be changed if necessary.

Due date

The 'Due date' is set by the person creating the recommendation/action. It should be set at a reasonable time that allows the recommendation/action to be implemented in order to achieve a reasonable quality and sustainable change yet in a time frame that is going to minimise the risk of repeat events occurring.

Location

The 'Location' in a newly generated recommendation/action will default to the 'Location of primary event' in the feedback record from which the recommendation/action is being generated. The 'Location' can be changed when creating a new recommendation/action by clicking on the 'Location' in the 'Complaints Recommendation/Action Form' menu. This may be required if the feedback record has multiple issues across multiple locations and the recommendations/actions will address these issues.

Complaints Recomm	nendation/Action Form		
Reference	Location		
Elist all recommendations E List all recommendations There are 26 overdue Actions My reports Posign a report New search Saved queries Help	Place of Incident / Event	•	
	Service Sub-Division	•	
	Service Division	•	
	Service		
	Health Service		
	Organisation		
			Submit action Cancel

See the WA Health Consumer Feedback Module Notifier User Guide for further detail about the behaviour of the six location tiers.

Submitting a recommendation/action

Once all the required fields have been completed, click 'Submit action' at the bottom of the screen. The recommendation/action will then be entered into the Recommendations/Actions module and linked to the consumer feedback record.

Submit action	Cancel
---------------	--------

Submitted recommendations/actions

Accessing submitted recommendations/actions

Submitted recommendations/actions can be accessed:

- through the related consumer feedback record, via the Actions menu item; or
- through the Recommendations/Actions module

Follow either of these options to open the 'Complaints Recommendation/Action Form' for a particular recommendation/action.

Complaints Recomm	nendation/Action Form	
Reference	Reference	
Location	Module	Consumer Feedback Module
Linked record	Record	
Dicuments	Linked record ID	83927
Print	Recommendation/Action ID	60692
Audit trail	Recommendation/Action Details	
Elist all recommendations	* Recommendation title	Test
⊞ Intere are 25 overdue Actions 웹 My reports ✓ Design a report ۹. New search 웹 Saved queries	Recommendation detail 🥝	Test detail
? нер	Recommendation/Action type	Procedure/practice modified
	What will be measured / what will your outcome be?	Test outcome
	* Assigned To	Feedback Coordinator cfm_co Demo 💌
	Key dates	
	★ Start date (dd/MM/yyyy)	11/12/2020
	★ Due date (dd/MM/yyyy)	22/01/2021
	Complete date (dd/MM/yyyy)	
	Action details	
	Describe the action that was completed	
		Save Cancel

Accessing through the related consumer feedback record

A submitted recommendation/action can be accessed via the 'Actions' page from the menu on the 'Feedback Management Form'. Clicking on any of the details for the recommendation/action will open the 'Complaints Recommendation/Action Form'.

Feedback overview People Involved	Actions				
Extra Demographic Details	Module	ID			
Issues Investigation Findings	Consumer Feedback Module	60692			
Third Party Comment	Create a new action				
Actions	Action chains				
Delay in Complaint Response	No action chains				

Accessing through the Recommendations/Actions module

A submitted recommendation/action can also be accessed directly from the 'Recommendations/Actions' module by searching particular details of the recommendation/action. The 'Action ID' will need to be known to ensure a singular result in the search as this is a unique identifier. See <u>Step 1: Searching</u> for details of how to perform a search in the 'Recommendations/Actions' module.

Fields completed at completion of implementation of a recommendation/action

A number of fields usually cannot be completed at the point of creation of the recommendation/action as their completion is dependent on the completion of the recommendation/action.

Complete date

The date completed should be entered once implementation has been completed. Press the 'Complete' button in the 'Done date' column.

Actions									
Module	ID	Recommendation detail	Assigned To	What will be measured / what will your outcome be?	Implementation due date	Implementation complete date	Due date	Complete date	Done date
Consumer Feedback Module	60692	Test detail	Feedback Coordinator cfm_co Demo	Test outcome			22/01/2021		Complete
Create a new action									

The following option to add additional comments is generated. <u>Leave this field blank</u> and click 'Apply'. This field is not accessible in the 'Complaints Recommendation/Action Form' so any information entered here will be lost.

Complete action	[×]
Additional comments	\$
Apply	Cancel

The above actions will cause the 'Done date' to auto-populate with today's date.

Actions									
Module	ID	Recommendation detail	Assigned To	What will be measured / what will your outcome be?	Implementation due date	Implementation complete date	Due date	Complete date	Done date
Consumer Feedback Module	60692	Test detail	Feedback Coordinator cfm_co Demo	Test outcome			22/01/2021		23/12/2020
Create a new action	1								

When the record is next saved or exited and re-entered the 'Done date' will move to the 'Complete date'. When there are no more incomplete actions (i.e. all the 'Complete' buttons have been clicked) the 'Done date' column will disappear.

The 'Complete date' can be adjusted by clicking into the recommendation/action, selecting a new 'Complete date' and clicking 'Save'.

Key dates			
* Start date (dd/MM/yyyy)	11/12/2020		
★ Due date (dd/MM/yyyy)	22/01/2021		
Complete date (dd/MM/yyyy)	23/12/2020		
Action details			
Describe the action that was completed			
	Save	Cancel	

Describe the action that was completed

Once the recommendation/action has been completed the activity that has been carried out should be noted in the free-text section 'Describe the action that was completed'. Any evidence of completion can also be included here. Documents can be attached if required (see '<u>Adding</u> <u>Documents to a Recommendation</u>').

Location

The 'Location' can be altered at any time via the 'Location' page. See the WA Health Consumer Feedback Module Notifier User Guide for further detail about the behaviour of the six location tiers.

Complaints Recomm	endation/Action Form	
Reference	Location	
Location Linked record	Place of Incident / Event	
Documents	Service Sub-Division	

Linked record

The linked consumer feedback record can be accessed via the 'Linked record' page. Clicking on any of the details of the consumer feedback record will navigate the user back to the consumer feedback record.

Complaints Recomm	endation/Action For	n			
Reference	Linked record				
Linked record	Consumer Feedback Mod	Consumer Feedback Module			
Documents	Recommendation/Action	Name	Date received by	Туре	Summary of events
Print			organisation		
Audit trail	83927		08/12/2020	Complaint	
:≡ List all recommendations				Save Cancel	

Adding Documents to a Recommendation

Additional supporting documentation can be added to the individual recommendation record via the 'Documents' screen on the 'Complaints Recommendation/Action Form'. Select 'Attach a new document'.

Complaints Recommendation/Action Form				
Reference Location	Documents No documents.			
Linked record	Attach a new document			
Print	Save Cancel			

A new window will open titled 'Attachment details'. Follow the prompts to save a document to the recommendation record. Multiple documents can be added. Documents must be added individually.

Attachment details	
* Link as	_
* Description	
★ Attach this file	Browse

'Link as' identifies the type of document to be attached.

'Description' allows for a brief description of the attachment e.g. complaint letter.

Clicking 'Browse' will allow the notifier to locate the file to be attached.

Note: Documents added to an individual recommendation are ONLY visible and accessible in that recommendation. These documents will not be directly accessible from the related consumer feedback record or other recommendations that exist for the same consumer feedback record.

Recommendations/Actions added in error

Recommendations/Actions that are added in error cannot be deleted from the system. If a recommendation/action is erroneously submitted, enter "Recommendation written in error" in the 'Recommendation title' and 'Recommendation detail' fields and select 'Recommendation written in error' from the drop-down options in the 'Recommendation/Action type' field.

Recommendation/Action Details		
★ Recommendation title	Recommendation written in error	
Recommendation detail 🕜	Recommendation written in error	be
Recommendation/Action type	Recommendation written in error	
What will be measured / what will your outcome be?		bs

Enter a nominal 'Complete date' as the date the above steps were taken. This will remove the recommendation/action from the 'To Do List' of the staff assigned.

Click 'Save' to record the changes and exit the recommendation record. The recommendation/action can then be excluded from any reporting on recommendations/actions.

Accessing the Recommendations/Actions module

To access recommendations/actions the assigned staff member will need to log in to Datix and click on the 'Recommendations/Actions' link.

To Do List My Dashboard	Recommend	lations/Actions	Contacts Ad	lmin Logout
Clinical Incident Management	System 🗸	Consumer Fee	edback Module	•

The following screen will then display:



Accessing all Recommendations/Actions

To obtain a full list of all recommendations/actions that you have permission to view, select 'List all recommendations' from the options list. A list of all recommendations/actions will then appear. Note that recommendations/actions relating to both Datix CFM and Datix CIMS will appear.

Actions Listing 31 records found. Displaying	g 1-20.								
E List all recommendations E There are 26 overdue Actions	Query: Choose		~	12			Sav	e the current search a	s a query.
My reports			Pecommendation		What will be	Implementation	Implementation		Complete
9 New search	Module	D	detail	Assigned To	measured / what will your outcome be?	due date	complete date	Due date	date
Saved queriesHelp	Consumer Feedback Module	60692	Test detail	Feedback Coordinator cfm_co Demo	Test outcome			22/01/2021	

The recommendation records can be sorted by clicking on the column headings. For example, to display the recommendations by 'Due date' click on the column heading 'Due date'. Clicking on a heading a second time will reverse the order.

Accessing all Outstanding Recommendations/Actions

To obtain a list of all recommendations/actions assigned to the user that have not yet been completed, access the 'To Do List' by clicking on the link shown below:

To Do List My Dashboard Rec	commendations/Acti	ions Contacts Admin	Logout			Government of Windom Avaitable Organization of Haarts
Clinical Incident Management Syst	em 🔻 Consume	er Feedback Module 🔻			Feedb	ack Coordinator cfm_co Demo
To Do List - All 1 record found. Displaying	1-1.					
All	ID	Module	Name		Action required	Due date
	60692	Recommendation	Test			22/01/2021
Overdue				Back		
Due today						
Due this week						
Due this month						
Help						

The 'To Do List' can be sorted by clicking on the column headings. For example, to display the recommendations by 'Due date' click on the column heading 'Due date'. Clicking on a heading twice will reverse the order. Note that recommendations/actions relating to both Datix CFM and Datix CIMS will appear.

Accessing a Specific Recommendation/Action

To search for a specific recommendation, select 'New search' from the options list in the 'Recommendations/Actions' module.

Recommendations/Actions
Options
List all recommendations
There are 26 overdue Actions
My reports
besign a report
🔍 New search
Saved queries
😣 Help

The search screen will then display with an option to search by 'Linked record ID' or 'Action ID' as well as a number of non-unique identifier fields.

Linked record ID

The 'Linked record ID' is also called the 'Datix ID' in Datix CFM and is unique to each feedback record. It is a six-digit number that is also included within the link included at the bottom of communication sent via 'Communication' as indicated here in the red box:

Please go to: http://wsfm242cim/index.php?action=record&module=COM&recordid=

The 'Linked record ID' can be used to search for all recommendations/actions relating to a particular feedback record and therefore this search may reveal multiple results.

Action ID

The 'Action ID' is specific to the individual recommendation/action. The 'Action ID' can be used to search for the particular recommendation/action you have been assigned. No other recommendations/actions will display in this search.

Non-unique identifier fields

It should be noted that the Recommendations/Actions module is a shared module with the WA Health Datix Clinical Incident Management System (CIMS). Therefore there are a number of fields that will appear that may relate to Datix CIMS but not Datix CFM. The fields outlined below relate to Datix CFM and can be used in a search in the Recommendations/Actions module for recommendations/actions relating to Datix CFM.

Action Form - Search	h for Records	
Reference	Reference	
Location	Module	Consumer Feedback Module
i≡ List all recommendations i≡ There are 26 overdue Actions	Linked record ID	
☑ My reports ✓ Design a report	Action ID	
New search □ Saved queries	Key dates Note: These date fields apply to both CIMS and CFM modules -	Due date & Complete date relate to evaluation.
? Help	Start date (dd/MM/yyyy)	
	Due date (dd/MM/yyyy)	
	Complete date (dd/MM/yyyy)	
	Action ownership/responsibility	
	Assigned To	
	Action details	
	Priority	•
	Action Type	•
	Note: This field relates to the CIMS SAC1 Action Chain and CFM.	
	Recommendation title	
	Recommendation detail	Ô
		*
	What will be measured / what will your outcome be?	$\hat{}$
	CFM Specific Fields	
	Recommendation/Action type	×
	Describe the action that was completed	
		~

Select 'Consumer Feedback Module' from the 'Module' and any other search terms required, noting the fields relevant to CFM. Refer to the WA Health Datix Clinical Incident Management System (CIMS) Searching, Reporting and Dashboard User Guide for further advice on completing searches in Datix including useful search symbols.

Reporting

Reporting on recommendations/actions is a two-step process: first a search (or query) must be performed and then a report must be generated. Reporting is done from the Recommendations/Actions module, not from the Consumer Feedback Module.

Custom reports

Step 1: Searching

Performing a search determines which records will be included in a report when it is generated. A search can be performed by using criteria that have been saved previously (called a query) or by generating a new search based on the requisite criteria.

Using Saved Queries

There are a number of standardised state-wide queries in the Recommendations/Actions module. To use these select 'Saved queries' in the Recommendations/Actions module.

Recommendations/Actions
Options
List all recommendations
There are 26 overdue Actions
My reports
🛃 Design a report
🔍 New search
Saved queries
e Help

The following screen will appear. Select the desired query from the pick-list and select 'Run query'. The standardised state-wide queries will be visible to all users with access to the Recommendations/Actions module. If the user has saved any queries (see <u>How to save a</u> <u>custom query</u>) these will also be available for selection. These queries are only visible to the particular user that saved them. By clicking on 'Edit' the title of a query can be edited or a query can be deleted. State-wide queries cannot be edited by the user.

Saved queries		
≔ List all recommendations	Saved queries	
There are 26 overdue Actions	Query	•
셈 My reports / Design a report		Run query Edit Cancel
Saved queries		
? Help		

A listing of all recommendations/actions meeting the specified query will then appear. The next step is to select the report to use via 'Design a report'. See <u>Design a report – one-step</u> for further detail.

Actions Listing 31 records found. Displaying	g 1-20.								
∷≡ List all recommendations ∷≡ There are 26 overdue Actions	Query: Choose V Save the current search as a que								s a query.
My reports	12								Next page
 Design a report New search Saved queries Help 	Module	ID	Recommendation detail	Assigned To	What will be measured / what will your outcome be?	Implementation due date	Implementation complete date	Due date	Complete date
	Consumer Feedback Module	60692	Test detail	Feedback Coordinator cfm_co Demo	Test outcome			22/01/2021	

As an alternative to navigating through 'Saved queries', a state-wide query can be selected by navigating directly to 'Design a report'. In this instance the search results will not be displayed prior to the report being generated. See <u>Design a report – one-step</u> for further detail.

Recommendations/Actions
Options
List all recommendations
There are 26 overdue Actions
My reports
🛃 Design a report
🔍 New search
E Saved queries
😡 Help

Using Custom Queries

Custom queries allow the user to select the exact search terms rather than using a standardised state-wide query. To use custom search criteria select 'New search'.

Recommendations/Actions
Options
List all recommendations
There are 26 overdue Actions
My reports
🛃 Design a report
🔍 New search
Saved queries
🛞 Help

Enter the search terms within the relevant CFM fields as outlined on page 25. Note the 'Module' should be selected as 'Consumer Feedback Module'. Click 'Search'. Refer to the WA Health Datix Clinical Incident Management System (CIMS) Searching, Reporting and Dashboard User Guide¹ for further advice on completing searches in Datix including useful search symbols.

Action Form - Searc	h for Records							
Reference	Reference							
Location	Module	Consumer Feedback Module						
i≡ List all recommendations i≡ There are 26 overdue Actions	Linked record ID							
 ☑ My reports ✓ Design a report 	Action ID							
Sover Search Saved gueries	Key dates Note: These date fields apply to both CIMS and CFM modules - Due date & Complete date relate to evaluation.							
? Help	Start date (dd/MM/yyyy)							
	Due date (dd/MM/yyyy)							
	Complete date (dd/MM/yyyy)							
	Action ownership/responsibility							
	Assigned To							
	Action details							
	Priority							
	Action Type	•						
	Note: This field relates to the CIMS SAC1 Action Chain and CFM.							
	Recommendation title							
	Recommendation detail	^						
		~						
	What will be measured / what will your outcome be?	^						
		×						
	CFM Specific Fields							
	Recommendation/Action type							
	Describe the action that was completed	_						
		× ×						

A listing of all recommendations/actions meeting the specified search criteria will then appear.

Actions Listing 31 records found. Displaying	g 1-20.								
 	Query: Choose Save the current search as a q							s a query.	
	Module	ID	Recommendation detail	Assigned To	What will be measured / what will your outcome be?	Implementation due date	Implementation complete date	Due date	Complete date
	Consumer Feedback Module	60692	Test detail	Feedback Coordinator cfm_co Demo	Test outcome			22/01/2021	

How to save a custom query

A search that is regularly performed can be saved to avoid having to re-enter the same information and to eliminate the potential for error in entering search terms. Once the results for a search are displayed there will be an option to 'Save the current search as a query' in the top-right corner of the Actions Listing screen.

¹ A WA Health Datix Consumer Feedback Module (CFM) Searching, Reporting and Dashboard User Guide is in development in collaboration with the Health and Disability Services Complaints Office (HaDSCO).

Actions Listing 26 records found. Displaying	1-20.								
	Query: Cho	ose			$\mathbf{\mathbf{v}}$		Save the curre	ent search as a	a query.
My reports	12 Next pa								
 Design a report New search Saved queries 	Module	ID	Recommendation detail	Assigned To	What will be measured / what will your outcome be?	Implementation due date	Implementation complete date	Due date	Complete date

Clicking 'Save the current search as a query' will generate the screen below. Enter an appropriate title for the query in 'Save as' and press 'Save'.

New saved query		
≔ List all recommendations	Query details	
There are 26 overdue Actions	Save as	Enter title
☑ My reports ✓ Design a report	Query type	Accessible to you only
ℜ New search I Saved gueries		Save
 List search results Clear the current search Help 		

Step 2: Reporting

Once a search has been conducted and the results displayed it is time to choose a report to display the information. Select 'Design a report' from the menu on the left. The 'Report designer – Recommendations/Actions' page will then display.

∷≡ List all recommendations							
≡ There are 28 overdue Actions							
l My reports							
✓ Design a report							
New search							
🖽 Saved queries							
Second							
Clear the current search							
? Help							

🛕 Report desig	jner - Recommendations/	Actions	«						
Report type			^						
		\bigwedge							
				No	re	noi	t to	dis	play
Report settings								GIS	pidy
Custom title									
* Query	[Current criteria]	•							
Field 1									
★ Form		•							
* Field label:		×							
Field 2									
Form		•							
Field label:		•	~						
Run a report Clear	settings		_						

Select a 'Report type' from the icons:

Bar Chart

Pie Chart

•

- Line Graph
- Pareto Graph
- SPC Chart
- Crosstab Report
- Listing Report
- Gauge Chart •
- Traffic Light Chart.

For further details about each report type refer to the WA Health Datix Clinical Incident Management System (CIMS) Searching, Reporting and Dashboard User Guide²

Enter a 'Custom title' for the report, if required.

If a 'Saved query' has been used as the search term it will be listed at 'Query'. If a custom search has been performed 'Query' will display as '[Current criteria]'.

Depending on the 'Report type' selected, different criteria will be required or available to be entered under 'Report settings', 'Field 1', 'Field 2' etc, and 'Additional options'. Complete all necessary fields for the report you have selected and click 'Run a report'. A preview of the report will display with options at the bottom such as 'Print' and 'Export'.

Design a report - one-step

It is possible to complete reporting in one-step by navigating directly to 'Design a report' from the 'Recommendations/Actions module' landing page. Select the required 'Query' from the drop-down list, noting that custom queries are not possible in the one-step process. Follow the above instructions for selecting the report type and running the report.

² A WA Health Datix Consumer Feedback Module (CFM) Searching, Reporting and Dashboard User Guide is in development in collaboration with the Health and Disability Services Complaints Office (HaDSCO).

My reports

The 'My reports' menu item links to a section where a query is pre-assigned to a specific report. There currently are not any reports in the 'My reports' section relevant to recommendations/actions made in Consumer Feedback Module records. All reports in this section are purposed for recommendations/actions made in records in the Clinical Incident Management System.

≔ List all recommendations
≔ There are 28 overdue Actions
☑ My reports
✓ Design a report
۹ New search
☑ Saved queries
۹ List search results
۹ Clear the current search
? Help



This document can be made available in alternative formats on request for a person with a disability.

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