

Government of Western Australia Department of Health

# Datix Consumer Feedback Module (CFM)

**Third Party User Guide** 

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Version 1.0

#### 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

#### Version Control

Version	Publication Date	Author	Reason for Release
0.1	N/A	Susan Woolley	Initial document
1.0	15/02/2021	Susan Woolley	Insert feedback from State Datix Committee Initial publication

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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 Compliments are entered into the WA Health Datix CFM by the notifier using the WA Health Datix CFM online feedback notification form.

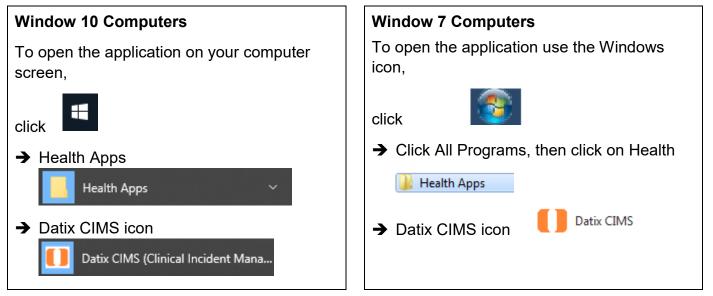
### About this Guide

- 1. In this guide, the web-based Datix CIMS 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.
  - Teal web and email addresses.
- 3. Points to note are depicted in a box:



4. A red box drawn on an image draws attention to particular DatixWeb functions or menu items discussed in the guide:

### **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	n (Anonymous) 🕴 Login to Datix CIMS (Us	er Identified)	Co-ammani of Weedern Australia Day of manifed Bach
Login to Datix CI	15		
A London An	D-the OIMO		
Description 10	Datix CIMS		
HE Number	1		
Password			
Passworu			
Domain	hdwa 🗸		
D officiality			
	Login		
	Login		
DatixWeb 14.0.11 © Datix Ltd 2016			🚺 Datix
Ltd 2016			Daux

### Logging out

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

Do List   My Dashboard   Recommendations/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   Recommendations/Actions   Contacts   Admin   Logo		ut
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
<ul> <li>Besign a report</li> <li>New search</li> </ul>	Complaints under investigation	1 records	1 Overdue
Saved queries	Complaints awaiting final reply	1 records	1 Overdue
😣 Help	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.	<b>New Feedback</b> – Complaints that have been notified but are in 'Pending' status and all open Compliments or Contacts and Concerns.
<b>My reports</b> – click here to access the standard report suite.	<b>Complaints awaiting acknowledgement</b> – Complaints that are lodged and awaiting acknowledgment to be sent to the complainant by the Feedback Coordinator
<b>Design a report</b> – click here to access individual design report suite.	<b>Complaints under investigation</b> – Complaints that
<b>New search</b> – click here to search for information within the CFM database.	are in the process of investigation by allocated investigators.
<b>Saved queries</b> – click here to access previously saved queries.	<b>Complaints awaiting final reply</b> – Complaints with completed investigation/s that are awaiting final communication with complainant.
<b>Help</b> – click here to access online help information.	<b>Closed feedback</b> – Complaints, Compliments or Contacts and Concerns 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.	<b>Inactive</b> – Complaints, Compliments or Contacts and Concerns that are NOT deemed to fall under the feedback module's model e.g. duplicate entries, erroneously entered data or staff feedback.

### **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.
ACC T	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.
<ul> <li>Help</li> <li>? Help</li> <li>?</li> </ul>	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	

### Third party comment

Each complaint is managed by a Feedback Coordinator. The Feedback Coordinator is responsible for ensuring the complaint management process is completed. The Feedback Coordinator may request certain staff to assist in conducting the investigation by assigning them as an investigator. The Feedback Coordinator or an investigator may also request comment from staff members with relevant expertise: these comments are considered third party comments.

### How will I know I need to provide a third party comment?

You will be requested to provide a third party comment via an email. The email will be sent via Datix CFM from the Feedback Coordinator or investigator and will contain a link to the complaint record. The email should also contain a description of the type of comment being requested.

### What do I do if I am requested to provide a third party comment?

Review the information that has been entered in the complaint on the 'Feedback overview' page and the issue/s on the 'Issues' page. If the 'Investigation Findings' have been completed, these can also be reviewed. There may also be supporting documents attached to the complaint record under 'Documents and Templates'.

Feedback overview	Feedback overview
People Involved	Name and reference
Extra Demographic Details	
Issues	Name
Investigation Findings	Reference
Third Party Comment	Datix ID
Actions	What is the Type of Feedback?
Delay in Complaint Response	★ Is the feedback negative in nature or does it express a concern or
Progress notes	dissatisfaction?
Documents and Templates	* Туре 🔞
Outcome	Click here to access the Complaints Management Policy
Department/Service Head/Director	
Communication	Details of Feedback
Linked Records	Is this an anonymous complaint? 🕜

Once all information has been reviewed formulate a comment that responds to the email requesting third party comment.

### How do I enter the information into the Datix record?

Once signed in to Datix CFM, navigate to the 'Third Party Comment' page from the menu.

Feedback Management Form		
Feedback overview	Third Party Comment	
People Involved Extra Demographic Details	If applicable, invite third party com contributing factors/recommendati	
Issues	Invite third party comment from	
Investigation Findings	Make use of the	
Third Party Comment	"Communication" section to send email invitations to third	
Actions	parties.	
Delay in Complaint Response		
Progress notes		

From here you can see any other staff who have been requested to provide Third Party Comment and any completed comments.

Feedback overview	Third Party Comment	
People Involved	· · ·	mont from relevant and Party(s) or ligica with and Party for commont, prior to determining
Extra Demographic Details	contributing factors/recommendation	ment from relevant 3rd Party(s) or liaise with 3rd Party for comment, prior to determining ons e.g. Medical Practitioner, Pharmacy, Radiology, Allied Health, Pain Service, etc.
Issues	Invite third party comment from	CIMS Third Party cims to Demo
Investigation Findings	Make use of the	7 -1
Third Party Comment	"Communication" section to send email invitations to third	
Actions	parties.	
Delay in Complaint Response		
Progress notes		•
Documents and Templates	Third party comment 1	
Outcome		vestigation and offer any additional relevant information
Department/Service Head/Director	Comment	
Communication		
Linked Records		
Print		
Audit trail		abe
+ Add a new consumer feedback	<	>
My reports	Name	
<ul> <li>Design a report</li> <li>New search</li> </ul>	Designation	
I Saved queries	Signature (HE number)	
? Help	Signature date	
	Signature time 24 hour format (ie, 08:30, 20:30 etc)	

Up to four staff members can be requested to provide third party comment. Navigate to an unutilised Third party comment section and add your comment in the free-text 'Comment' box.



Complete the sign-off section, including name, designation, sign the completed investigation with your HE number, and note the date and time of signing.

Name	
Designation	•
Signature (HE Number)	
Signature date	
Signature time 24 hour format (ie, 08:30, 20:30 etc)	

Press 'Save' at the bottom of the page.

### How do I add supporting documents to the record?

Additional documents can be attached to the record at any time via the 'Documents and Templates' page and selecting 'Attach a new document'.

Feedback overview	Documents and Templates
People Involved	
Extra Demographic Details	All documents are to be date stamped and in non-editable format, e.g. pdf
	No documents.
Issues	Attach a new document
Investigation Findings	
Third Party Comment	Save Cancel
Actions	
Delay in Complaint Response	
Progress notes	
Documents and Templates	

A new window will open titled 'Attachment details'.

Attachment details	
* Link as	<b>•</b>
* 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.

#### How will the Feedback Coordinator know I have provided my comment?

Utilise the 'Communication' tab to notify the Feedback Coordinator once you have provided your comment. Select the Feedback Coordinator's name from drop-down titled 'Staff and contacts

attached to this record'. Write an appropriate message in the 'Body of message' free-text section and press 'Send message'. Save the record to exit.

Feedback overview		
People Involved	Communication	
Extra Demographic Details	Recipients	
Issues	Staff and contacts attached to this record Only staff and contacts with e-mail addresses are shown.	
Investigation Findings	only stan and contacts with e-mail addresses are shown.	
Third Party Comment		
Actions		
Delay in Complaint Response		
Progress notes		
Documents and Templates	All users Only users with e-mail addresses are shown.	
Outcome		
Department/Service Head/Director		
Communication		
Linked Records		· · · · · · · · · · · · · · · · · · ·
Print	Additional recipients Enter e-mail addresses of other recipients not listed above.	
Audit trail	You can	
	enter multiple addresses, separated by commas.	
+ Add a new consumer feedback My reports	Message	
Design a report	Subject	Datix CFM communication
% New search	Body of message	This is a message from Feedback Coordinator cfm_co Demo. Record ID is
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is
	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php?
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is:
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php?
🖽 Saved queries	-	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php?
🖽 Saved queries	Body of message	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php? action=record&module=COM&recordid=83948
🖽 Saved queries	Body of message	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php? action=record&module=COM&recordid=83948
🖽 Saved queries	Body of message	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php? action=record&module=COM&recordid=83948
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🖽 Saved queries	Body of message	This is a message from Feedback Coordinator cfm_co Demo. Record ID is 83948. The message is: Please go to: http://wsfm242cim/index.php? action=record&module=COM&recordid=83948



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