Government of **Western Australia**
Department of **Health**

WA Health Datix Consumer Feedback Module (CFM)

Recommendations/Actions User Guide

March 2021

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	10/03/2021	Susan Woolley	Insert feedback from State Datix Committee Initial publication

Contents

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.
   - 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:

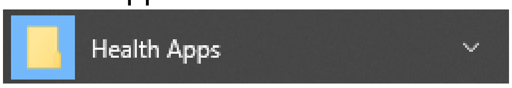
Accessing WA Health Datix CIMS

Window 10 Computers

To open the application on your computer screen,

click

➔ Health Apps



➔ Datix CIMS icon

Window 7 Computers

To open the application use the Windows icon,

click

➔ Click All Programs, then click on Health

➔ Datix CIMS icon

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.

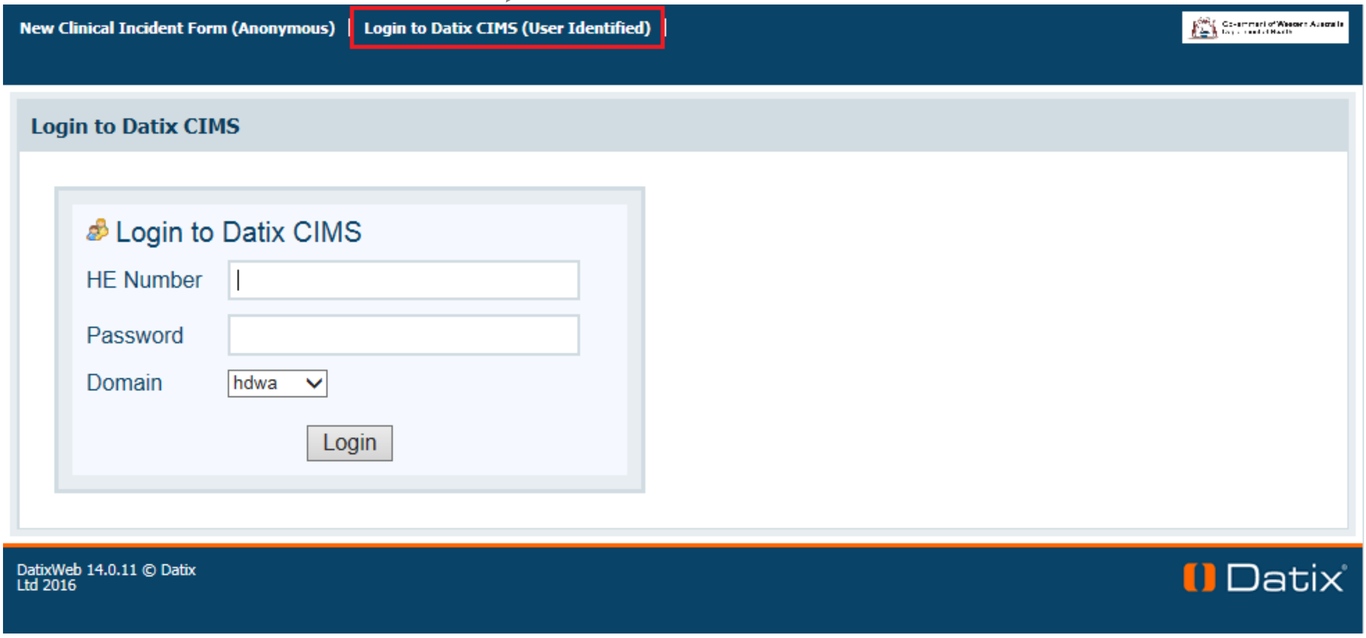
User profiles need to be assigned to individual users of the system. Group email addresses should not be used.

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.

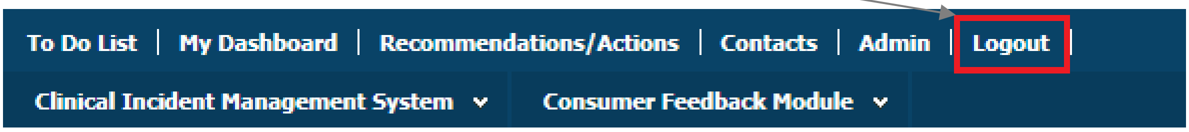
Logging into WA Health Datix CFM

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.



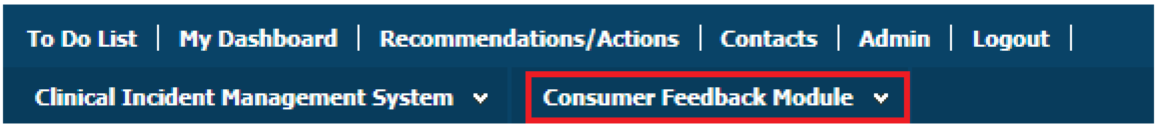
Logging out

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

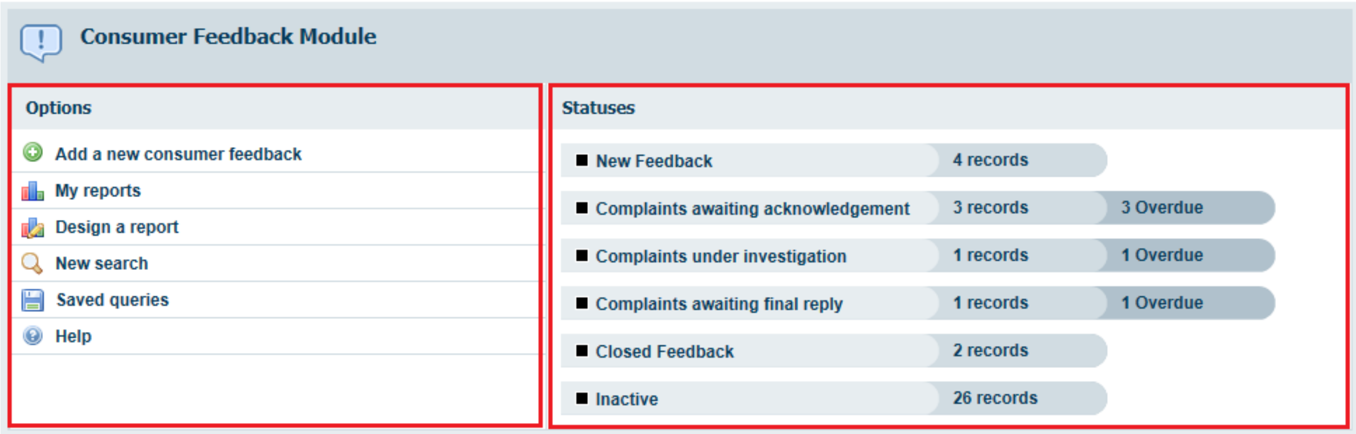


WA Health Datix CFM Status Screen

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



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.

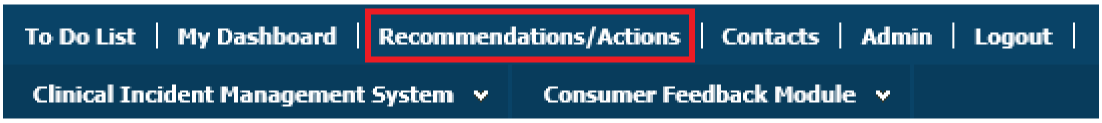


Alternatively those complaint records at a particular status which have overdue elements can be viewed by clicking the number of records displayed as 'Overdue'. As the 'Overdue' label is dependent on correct dates existing in the 'Primary Complainant Chain', these prompts should only be relied upon if 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.

Options	Statuses
Add a new consumer feedback – click here to open a blank Feedback Notification Form to report a new consumer feedback. **My reports** – click here to access the standard report suite. **Design a report** – click here to access individual design report suite. **New search** – click here to search for information within the CFM database. **Saved queries** – click here to access previously saved queries. **Help** – click here to access online help information. 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.	**New Feedback** – Complaints that have been notified but are in 'Pending' status and all open Compliments or Contacts. **Complaints awaiting acknowledgement** – Complaints that are lodged and awaiting acknowledgment to be sent to the complainant by the Feedback Coordinator **Complaints under investigation** – Complaints that are in the process of investigation by allocated investigators. **Complaints awaiting final reply** – Complaints with completed investigation/s that are awaiting final communication with complainant. **Closed feedback** – Complaints, Compliments or Contacts that are closed. **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.

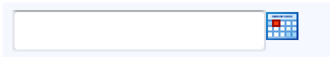
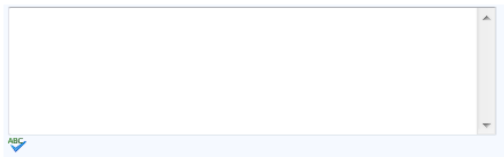
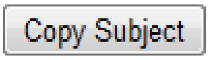


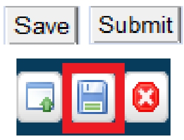
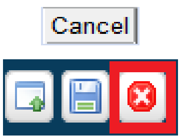
Recommendations/actions are created from within a CFM or CIMS record. Once created, individual recommendations/actions are linked within the system to the relevant CFM or CIMS record. Searching and reporting on recommendations/actions is done in the Recommendations/Actions module.

General navigation information and Datix features

Common fields and icons

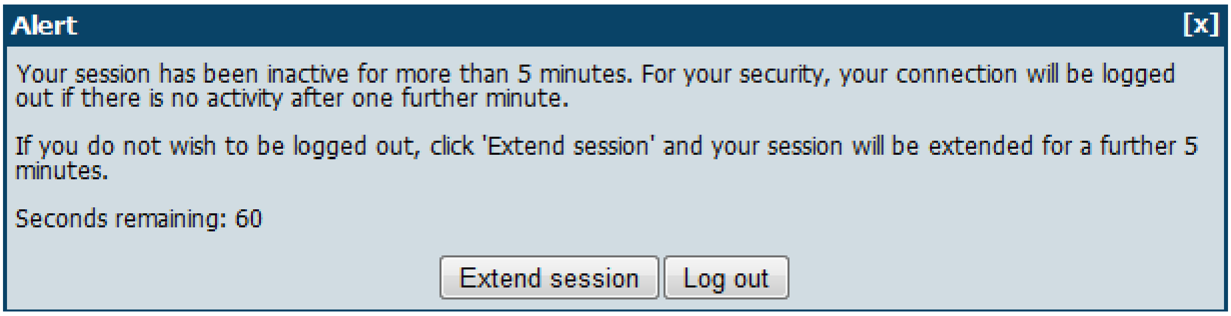
A number of features are common to many areas of the WA Health Datix CFM

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.
	Free text field	Type text in to this field. Spell check function is available.
	Add another	Click on this to add an identical section without copying content.
	Copy subject	Click on this to add an identical section with content copied.
	Clear section	This enables the section within the form to be cleared of all entered data.
	Spell check	Click to check your spelling.
	Pencil	Click to close spell check and return to entering text.
	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.
	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	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 button located at the bottom of the ‘Feedback notification form’ or in floating menu (bottom left of page)
	Search	This allows a ‘search’ of the data to be conducted
	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.

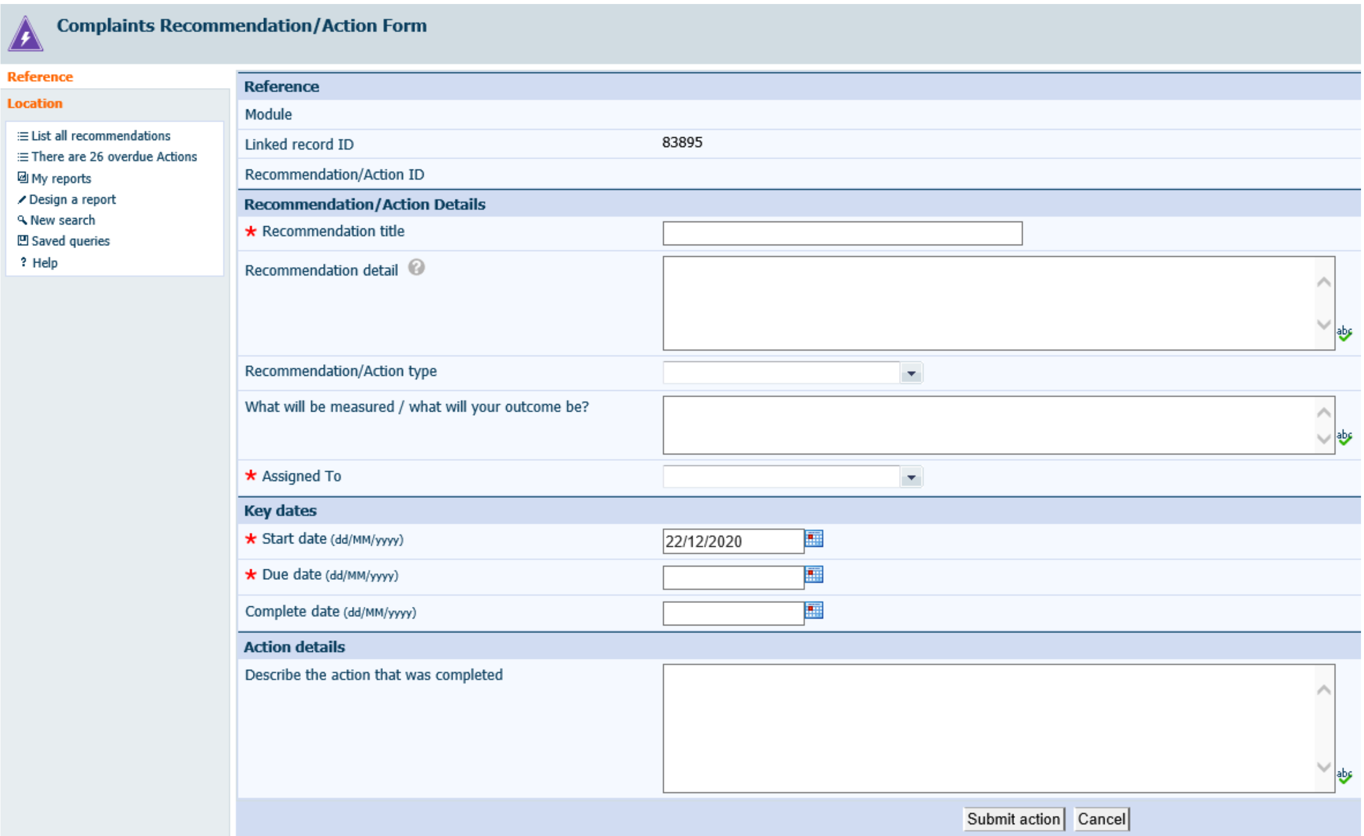


Creating new Recommendations/Actions

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'.

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



Fields completed at creation of a new recommendation/action

Recommendation title

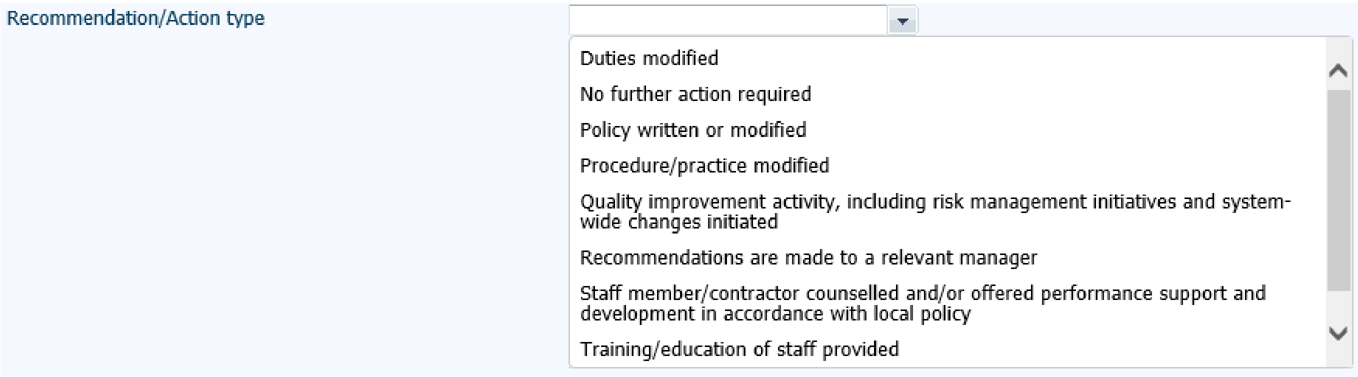
The ‘Recommendation title’ is a brief description of the recommendation/action. It allows users to quickly identify recommendations/actions on their ‘To Do List’ and in reports.

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’.



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

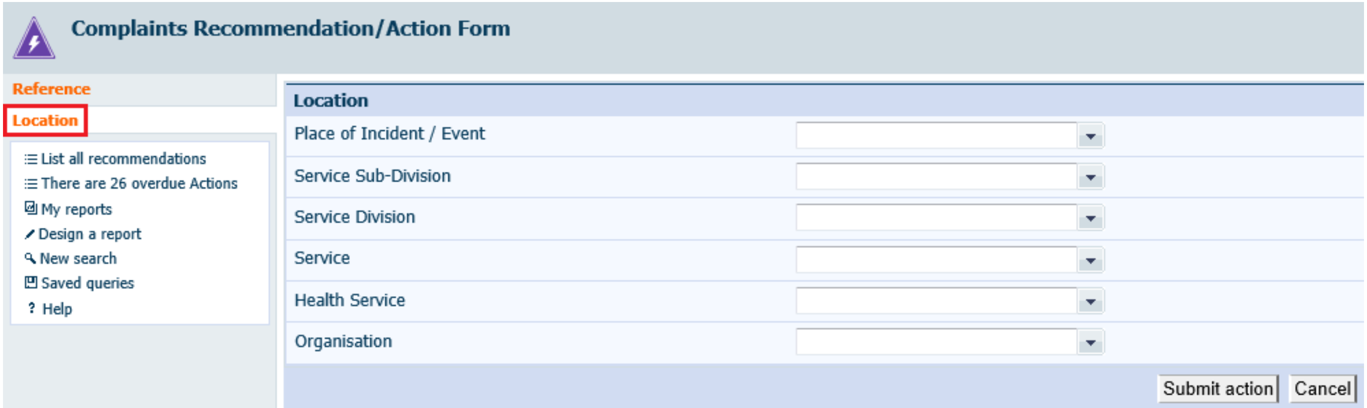
The start date auto-populates with the date the action is generated in the system. This can be changed if necessary.

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.



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.

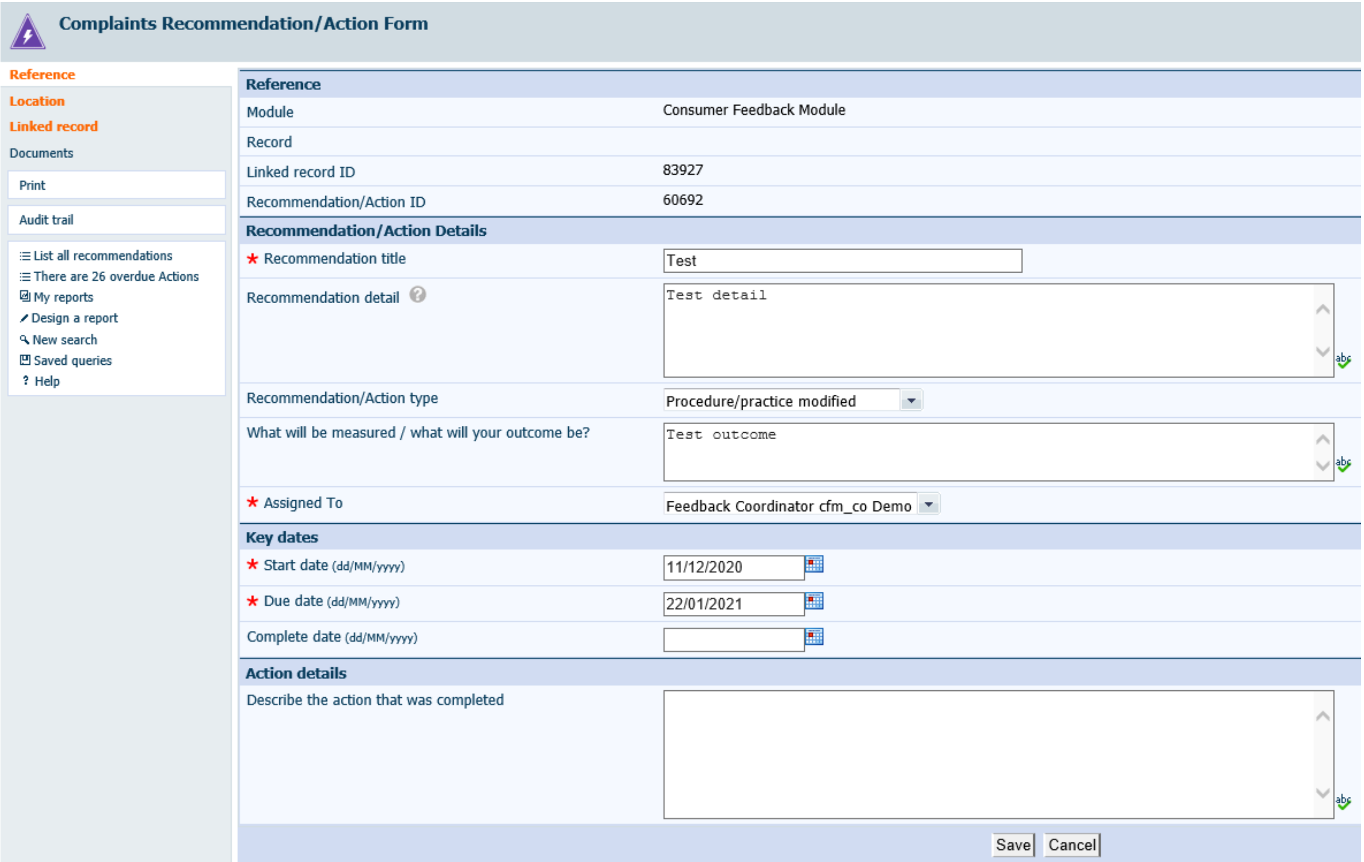
Submitted recommendations/actions

Accessing submitted recommendations/actions

Submitted recommendations/actions can be accessed:

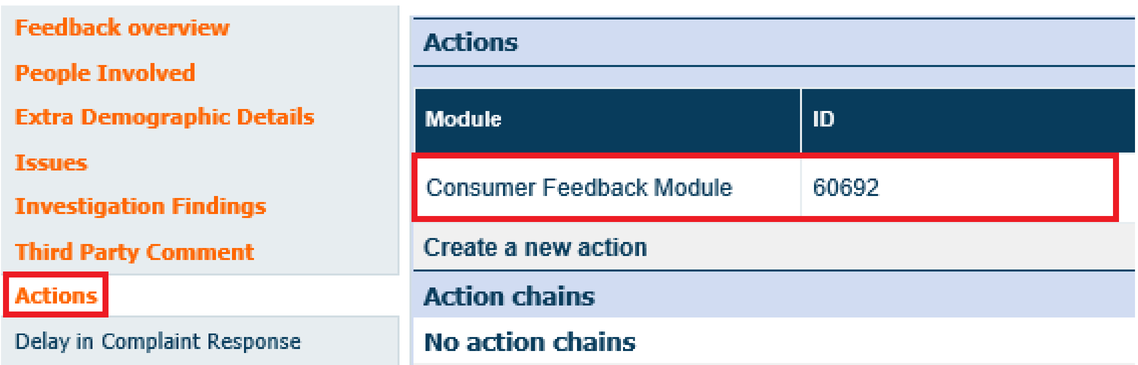
- through the related consumer feedback record, via the Actions menu item; or
- through the Recommendations/Actions module

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



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'.



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 Step 1: Searching 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

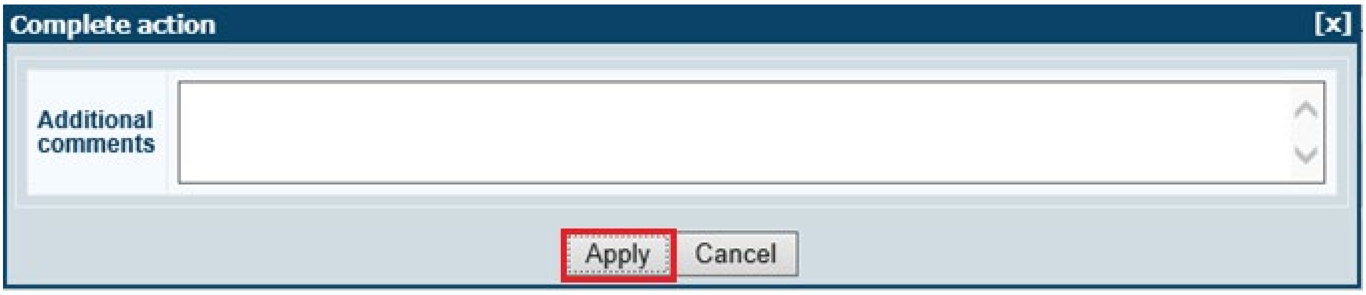
The date completed should be entered once implementation has been completed. Press the 'Complete' button in the 'Done date' column.

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. **Leave this field blank** and click 'Apply'. This field is not accessible in the 'Complaints Recommendation/Action Form' so any information entered here will be lost.



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

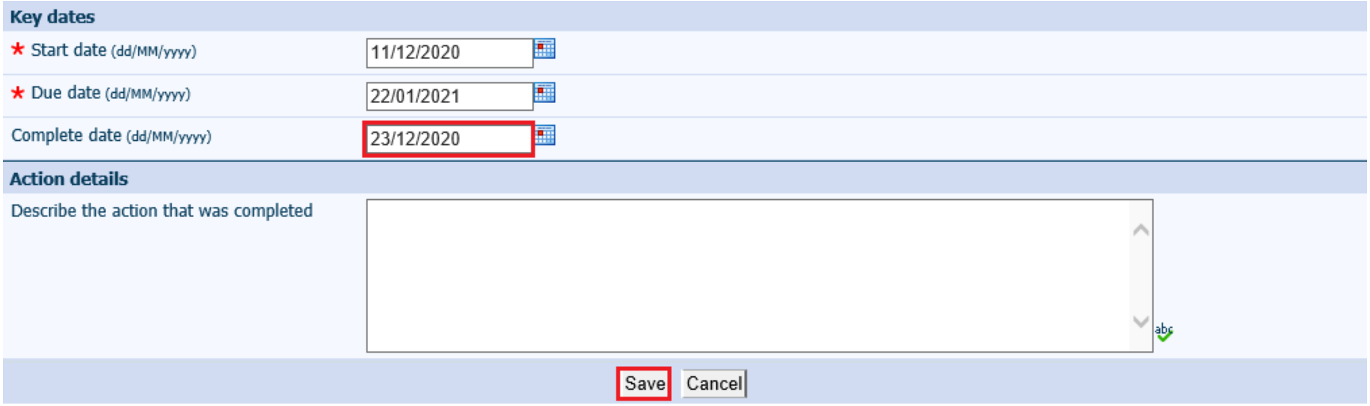
Actions

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

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'.

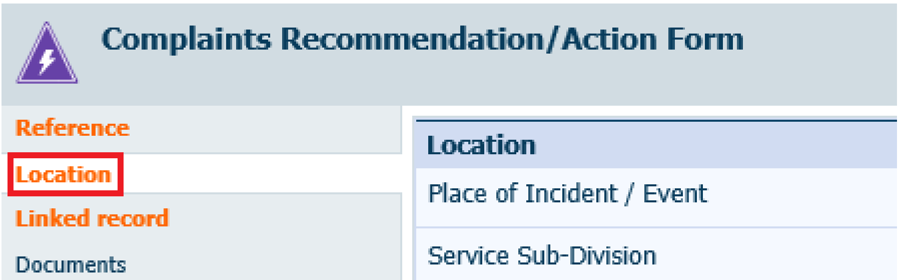


Describe the action that was completed

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 'Adding Documents to a Recommendation').

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.

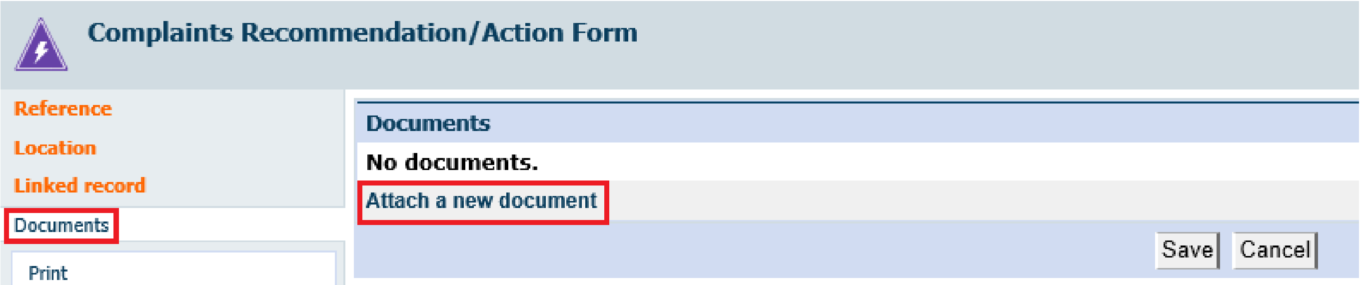


Linked record

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.

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’.



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.

‘Link as’ identifies the type of document to be attached.

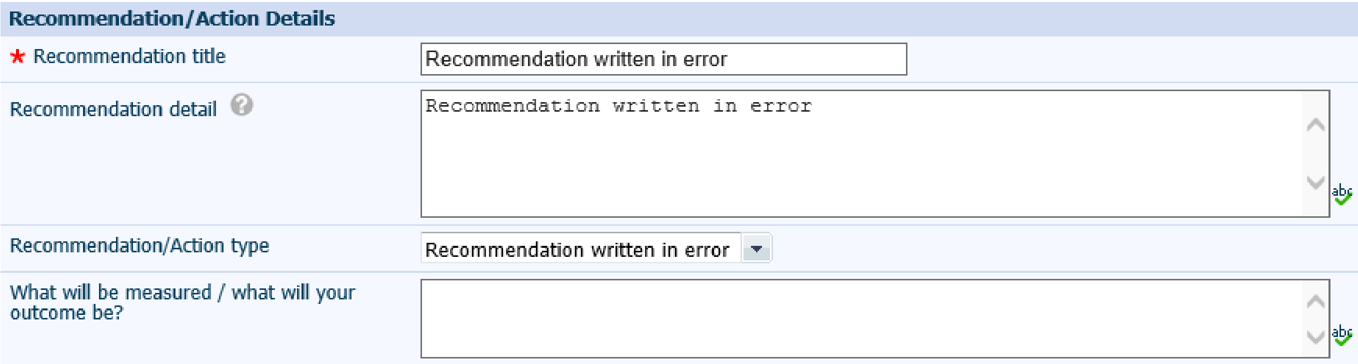
‘Description’ allows for a brief description of the attachment e.g. complaint letter.

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
Recommendation/Action type	Recommendation written in error
What will be measured / what will your outcome be?	

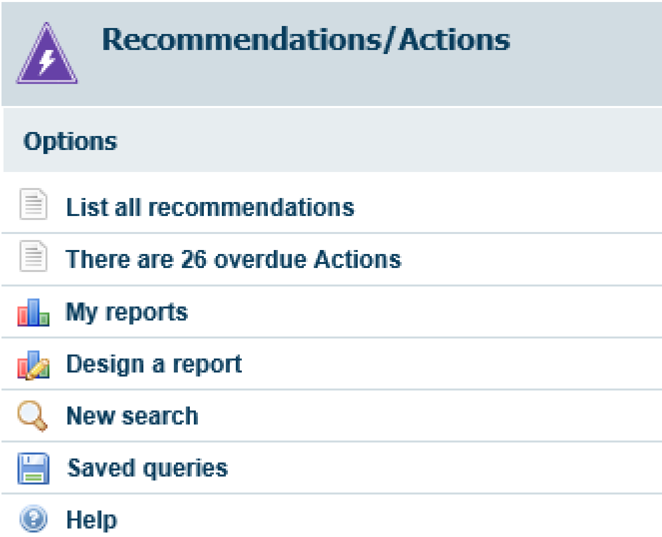
Enter a nominal ‘Complete date’ as the date the above steps were taken. This will remove the recommendation/action from the ‘To Do List’ of the staff assigned.

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

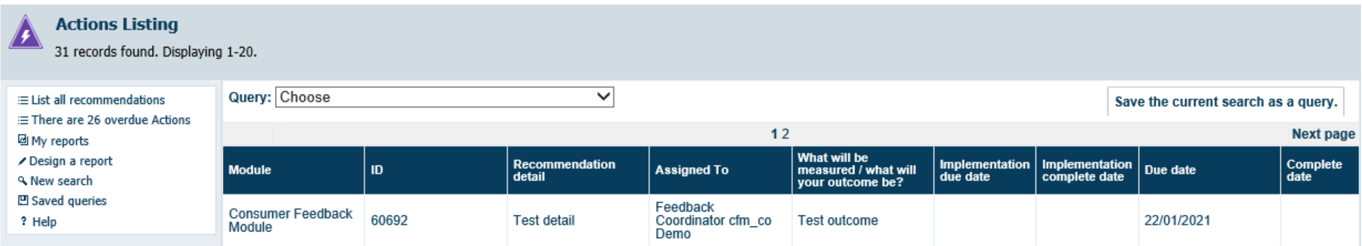
To access recommendations/actions the assigned staff member will need to log in to Datix and click on the 'Recommendations/Actions' link.

The following screen will then display:



Accessing all Recommendations/Actions

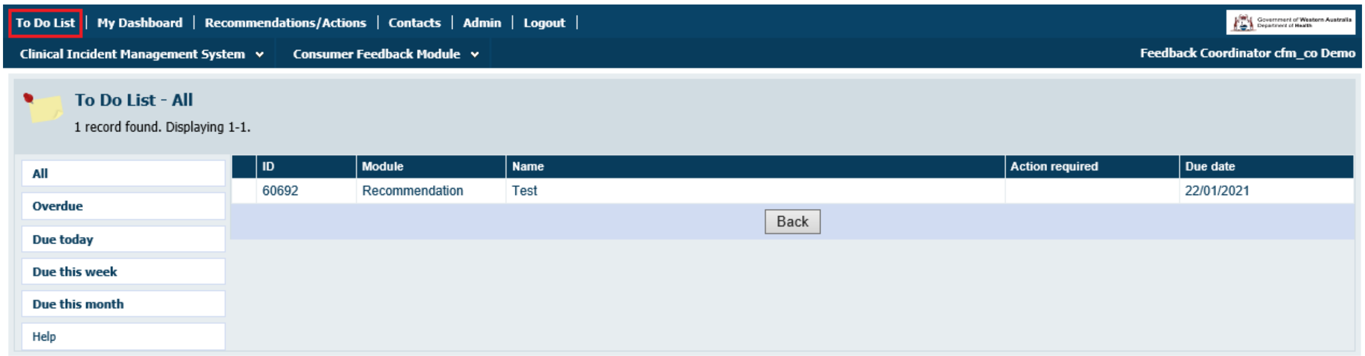
To obtain a full list of all recommendations/actions that you have permission to view, select 'List all recommendations' from the options list. A list of all recommendations/actions will then appear. Note that recommendations/actions relating to both Datix CFM and Datix CIMS will appear.



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

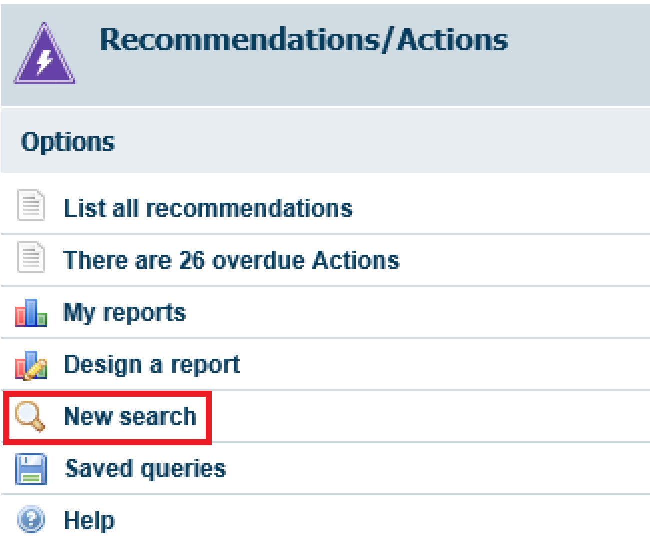
To obtain a list of all recommendations/actions assigned to the user that have not yet been completed, access the 'To Do List' by clicking on the link shown below:



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.



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:

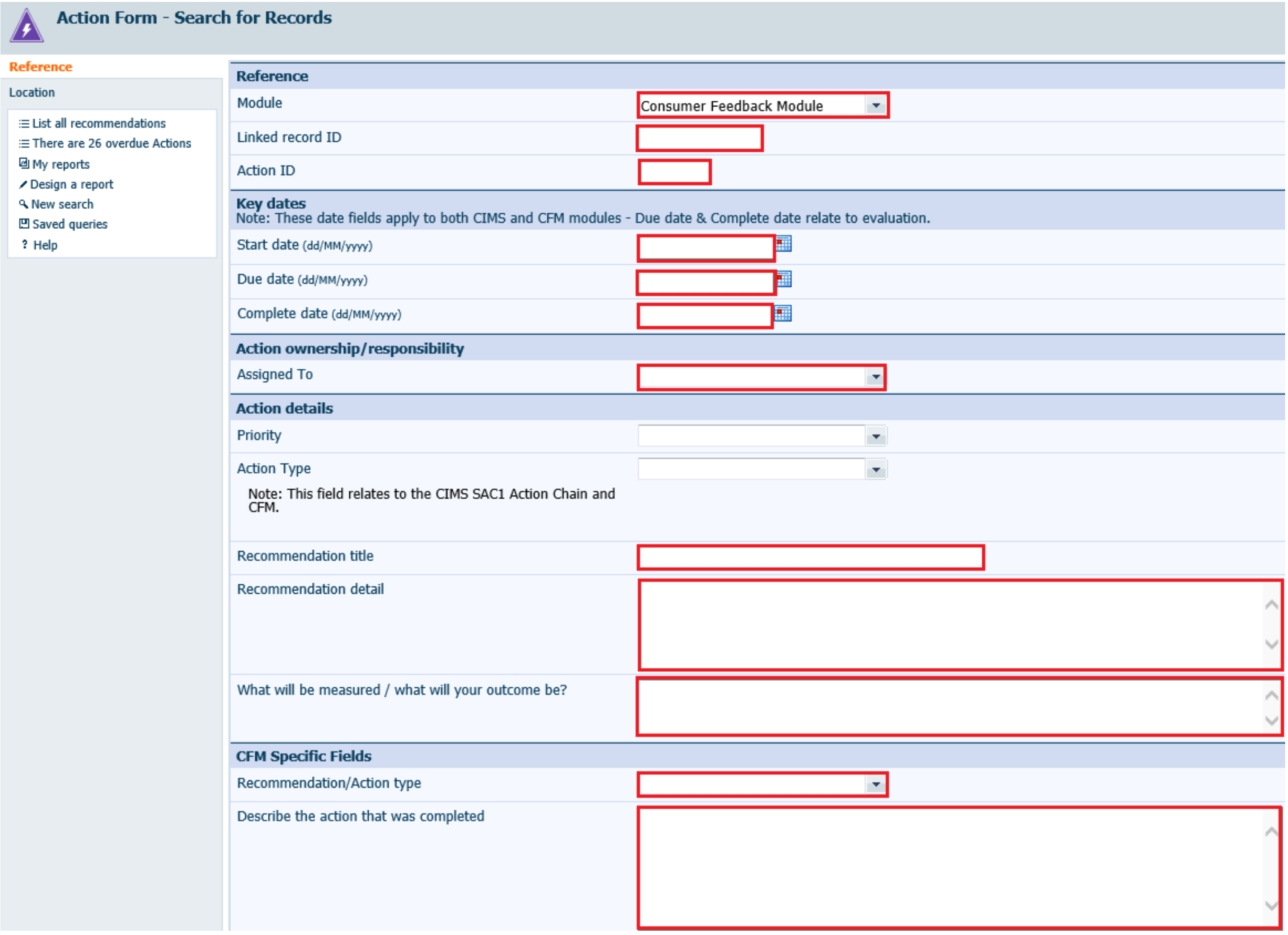
The 'Linked record ID' can be used to search for all recommendations/actions relating to a particular feedback record and therefore this search may reveal multiple results.

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.



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.

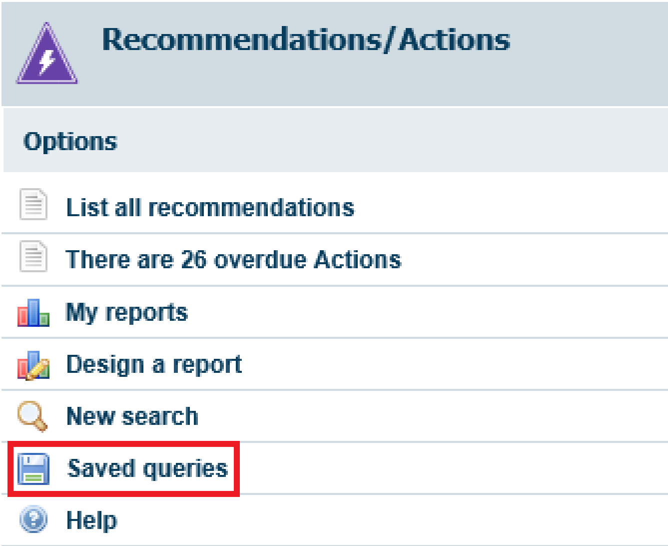
Custom reports

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.

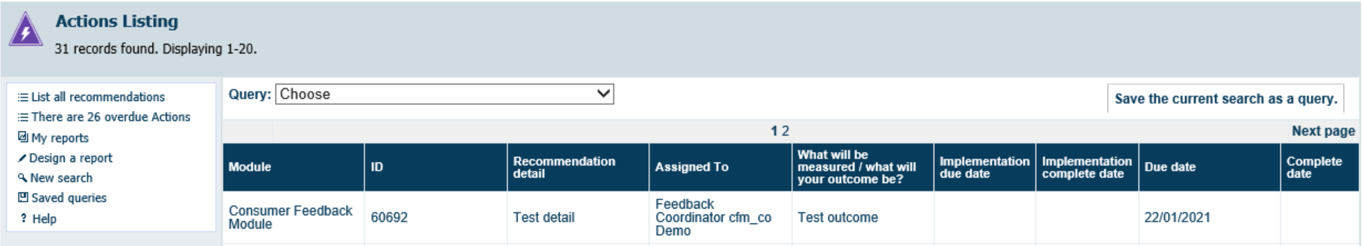
Using Saved Queries

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.

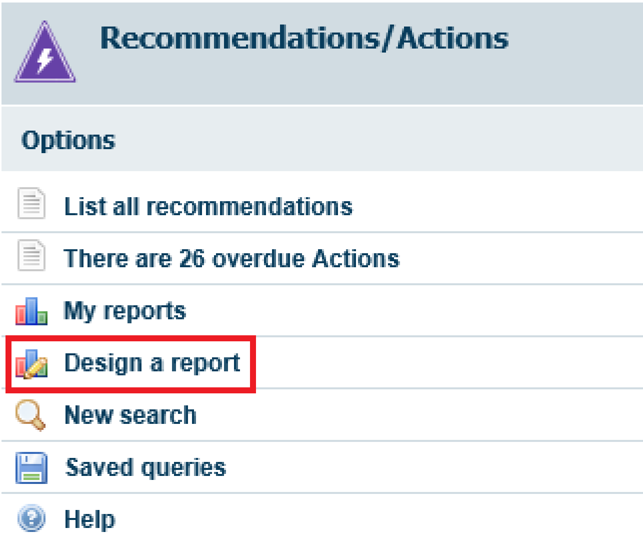


The following screen will appear. Select the desired query from the pick-list and select 'Run query'. The standardised state-wide queries will be visible to all users with access to the Recommendations/Actions module. If the user has saved any queries (see How to save a custom query) these will also 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.

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 Design a report – one-step for further detail.

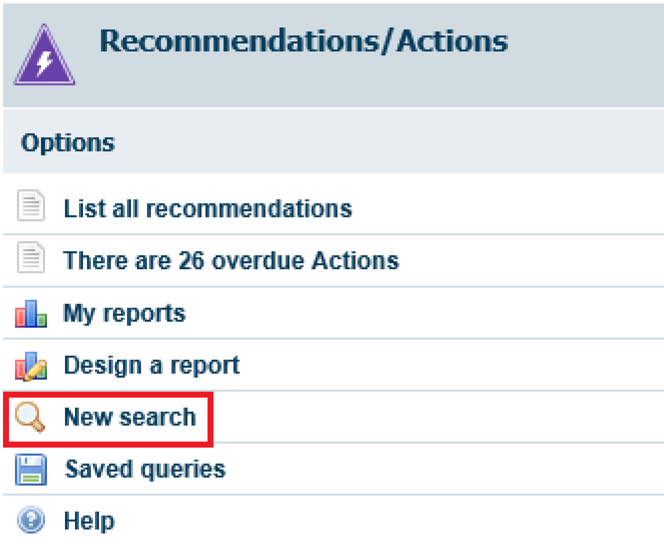


As an alternative to navigating through ‘Saved queries’, a state-wide query can be selected by navigating directly to ‘Design a report’. In this instance the search results will not be displayed prior to the report being generated. See Design a report – one-step for further detail.

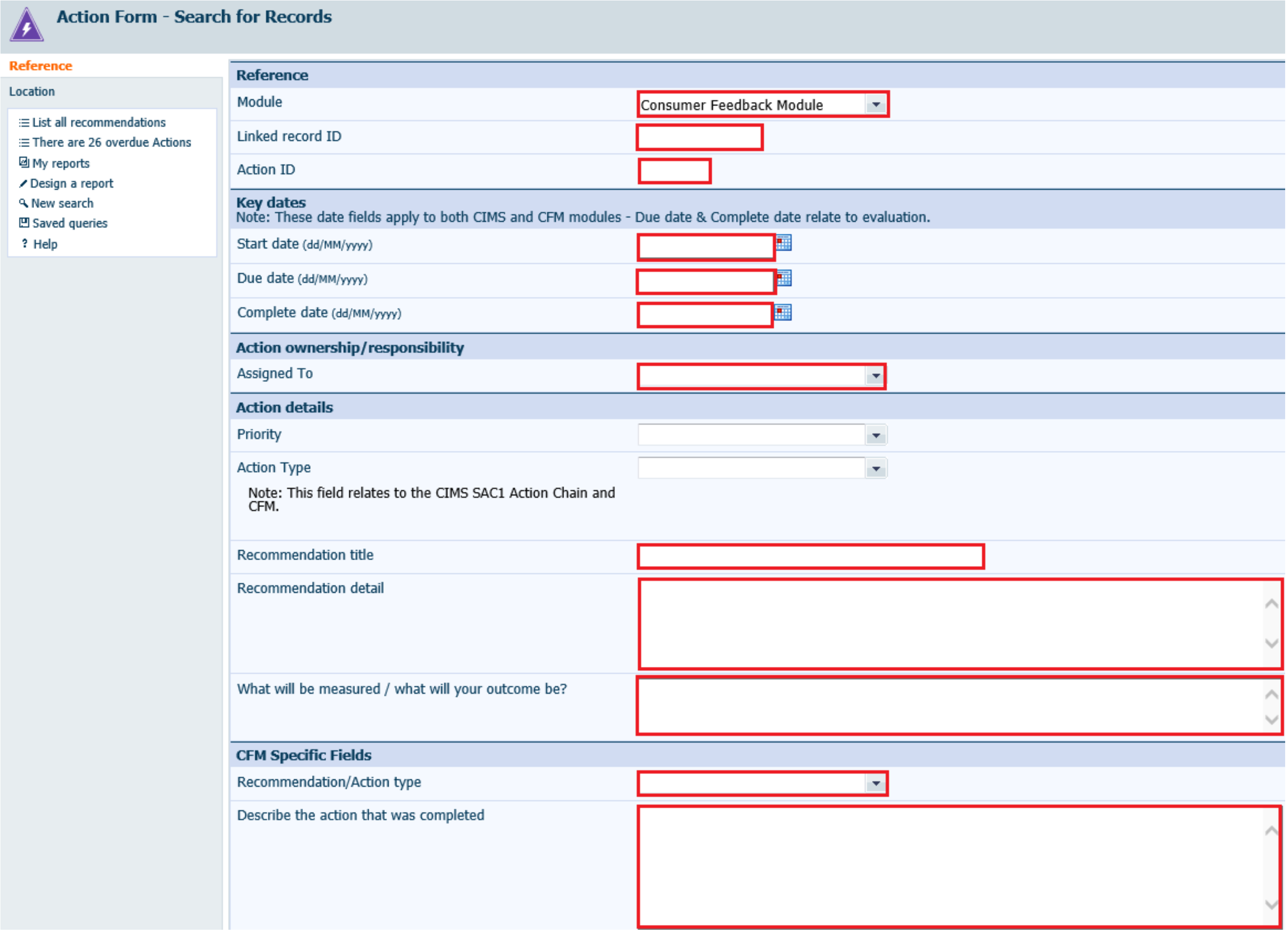


Using Custom Queries

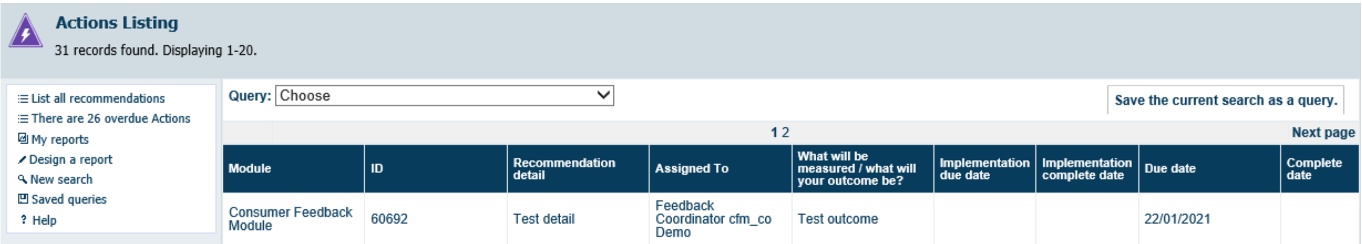
Custom queries allow the user to select the exact search terms rather than using a standardised state-wide query. To use custom search criteria select ‘New search’.



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 Guide[1] for further advice on completing searches in Datix including useful search symbols.



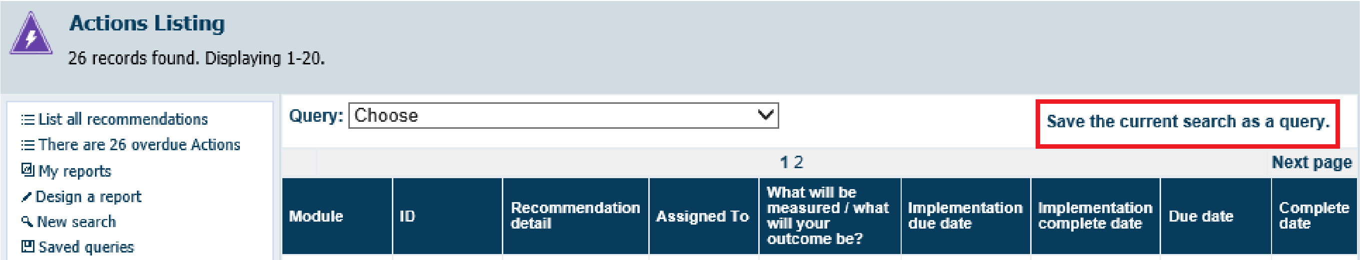
A listing of all recommendations/actions meeting the specified search criteria will then appear.



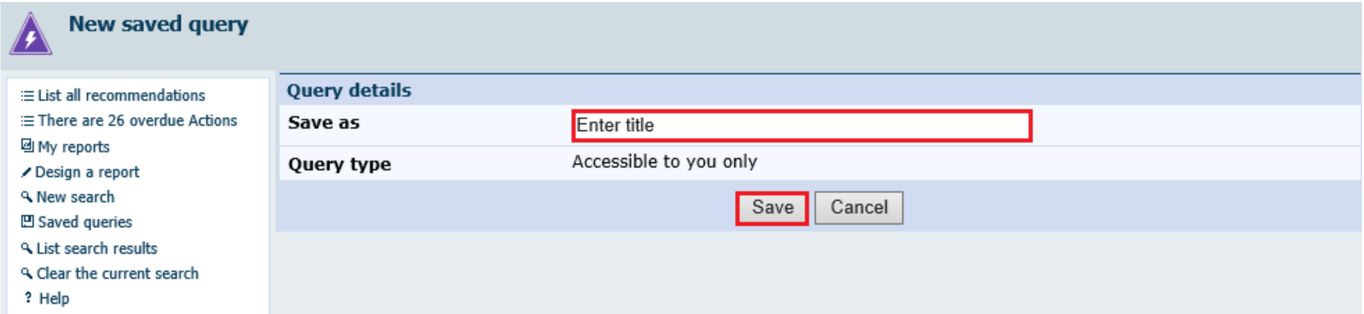
How to save a custom query

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).

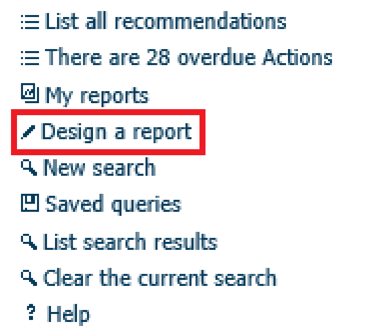


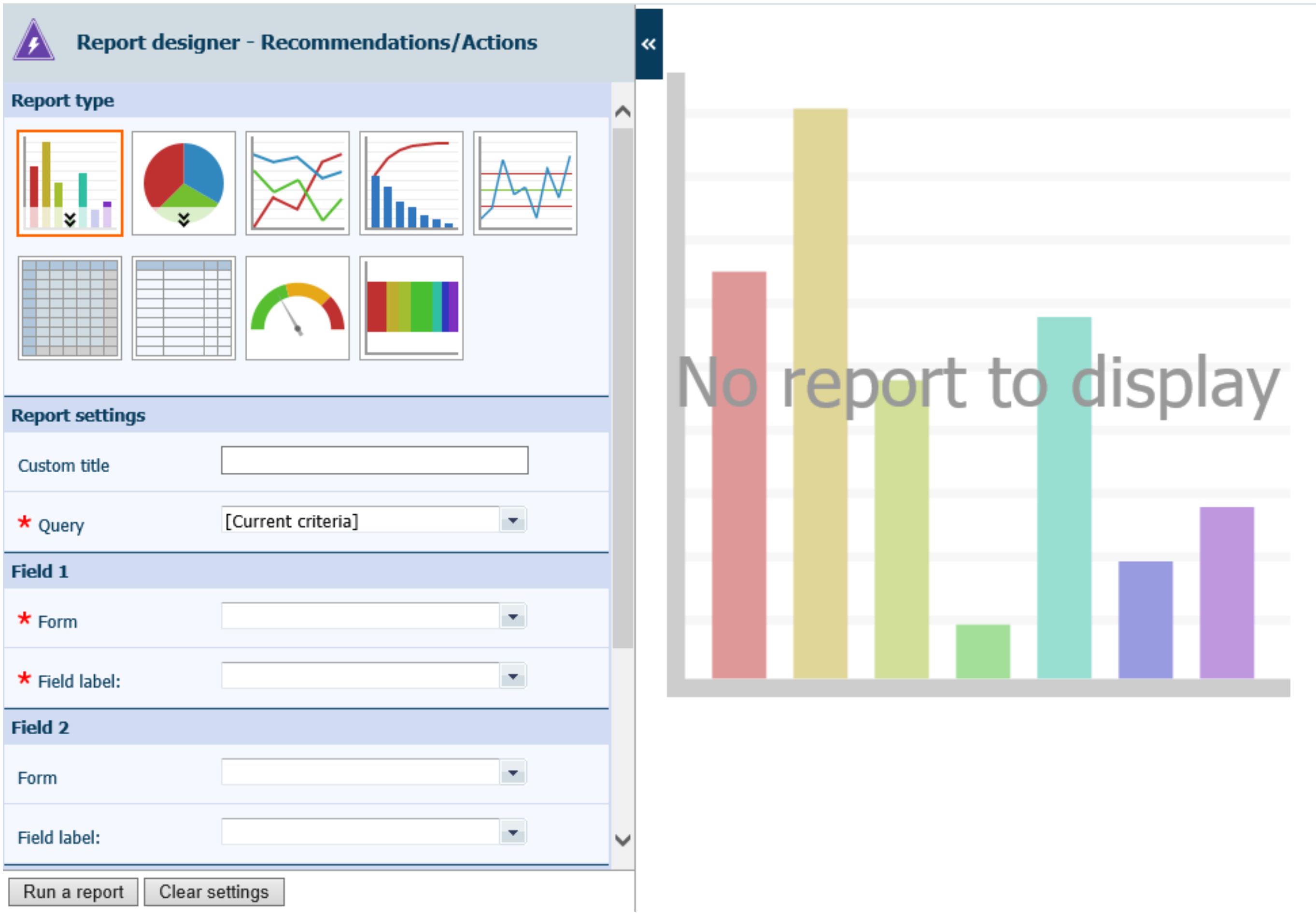
Clicking ‘Save the current search as a query’ will generate the screen below. Enter an appropriate title for the query in ‘Save as’ and press ‘Save’.



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.





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 Guide[2]

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'.

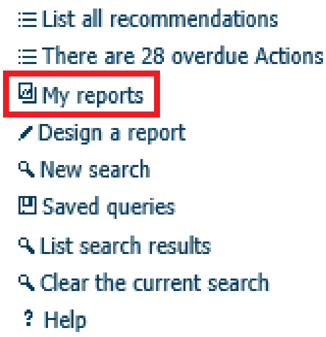
Design a report – one-step

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.



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