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

Datix Consumer Feedback Module (CFM)

Investigator User Guide

February 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	15/02/2021	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 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:
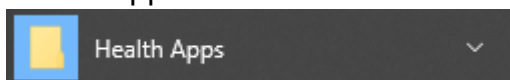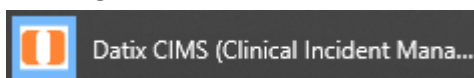
Accessing WA Health Datix CIMS

Window 10 Computers	Window 7 Computers
To open the application on your computer screen,	To open the application use the Windows icon,
click	click
➔ Health Apps	➔ Click All Programs, then click on Health
➔ Datix CIMS icon	➔ Datix CIMS icon
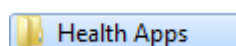
Security access

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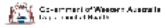
User profiles need to be assigned to individual users of the system. Group email addresses should not be used.

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.
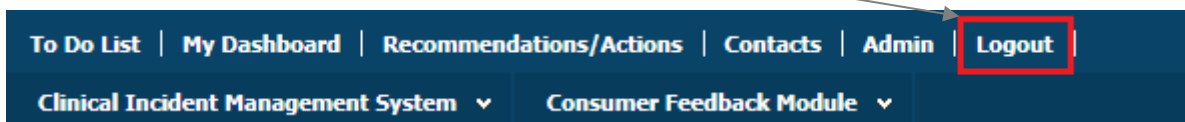
WA Health Datix CFM Status Screen

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.

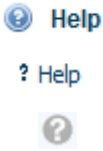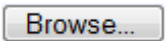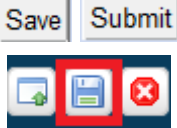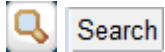| **Options**	**Statuses**
Add a new consumer feedback – click here to open a blank Feedback Notification Form to report a new consumer feedback.	**New Feedback** – Complaints that have been notified but are in 'Pending' status and all open Compliments or Contacts and Concerns.
My reports – click here 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 are in the process of investigation by allocated investigators.
New search – click here to search for information within the CFM database.	**Complaints awaiting final reply** – Complaints with completed investigation/s that are awaiting final communication with complainant.
Saved queries – click here to access previously saved queries.	**Closed feedback** – Complaints, Compliments or Contacts and Concerns that are closed.
Help – click here to access online help information.	**Inactive** – 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.
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.	
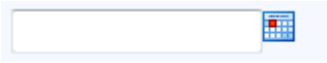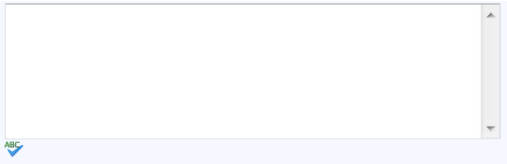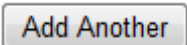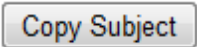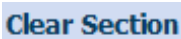
General navigation information and Datix features

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	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.
ⓘ Help ? Help ⓘ	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...	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]
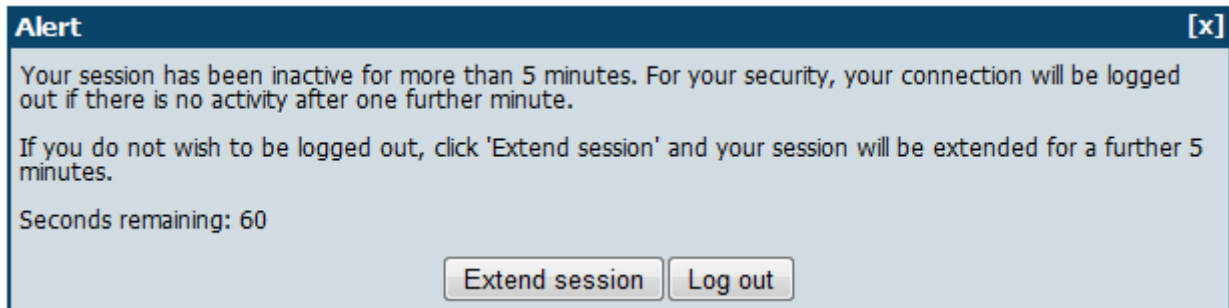
Complaints under investigation

The investigation of a complaint offers the opportunity to determine what occurred to whom and how, and to identify how things might be or should be done better in the future. The investigation function within Datix CFM allows a Feedback Coordinator to assign investigators to the complaint issue/s. The Feedback Coordinator will maintain the coordination role of the complaint but may request investigation and comment from staff close to the issue/s raised in the complaint.

How do I know if I am assigned as an investigator?

If a Feedback Coordinator assigns you as an investigator you will receive the below email with a link to the complaint record. You will need to sign in to Datix to access the record.
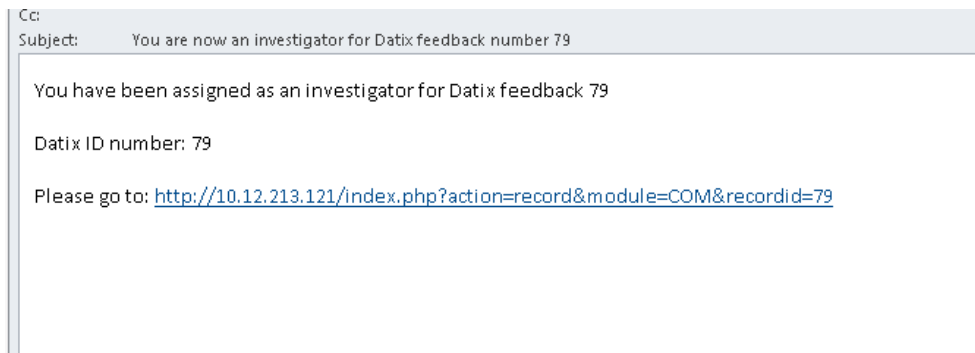
The text in the above email cannot be edited by the Feedback Coordinator. Therefore, they may send another communication through Datix with further details about what requires investigation in the complaint. For example, they may assign multiple investigators to a complaint record with the intention that they investigate and comment on different issues raised by the person reporting the feedback.

What do I do if I am assigned as an investigator?

The investigator should review the information that has been entered in the complaint on the 'Feedback overview' page and the issue/s on the 'Issues' page. There may also be supporting documents attached to the complaint record under 'Documents and Templates'.
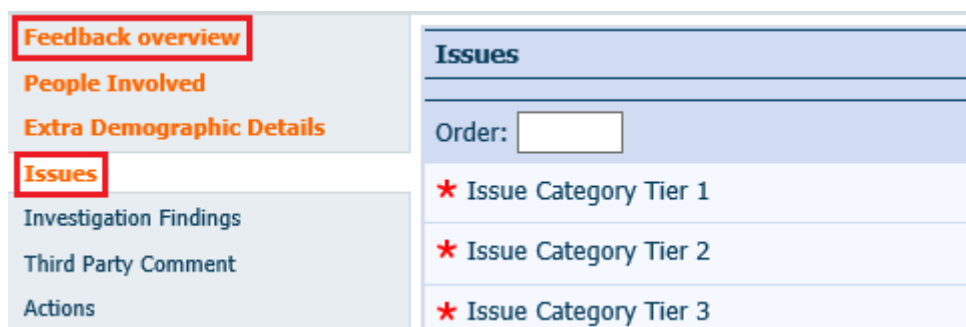
If there are multiple issues, the Feedback Coordinator may have specified which issues the investigator should investigate. If an 'issue number' is referred to, this is the 'Order' from the 'Issues' page. Clarify with the Feedback Coordinator if necessary.

Information about completing a complaint investigation is outlined in the Complaints Management Guideline. Once the investigation is complete the investigator is responsible for entering relevant information in to the Datix CFM record.

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

Once signed in to Datix CFM, navigate to the 'Investigation Findings' page from the menu.
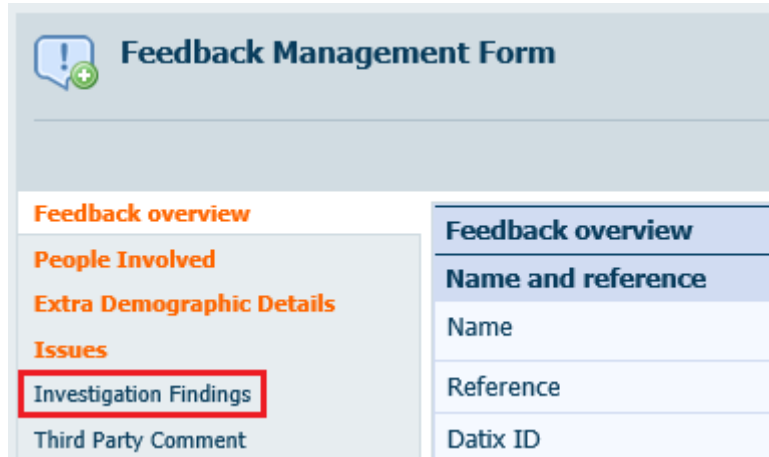
From here you can see any other Investigators assigned and any completed investigation comments.

List the issues you have investigated at 'Issue number', i.e. the 'Order' from the 'Issues' page.

Details about the findings of the investigation should be entered in the 'Comment' section. This should be objective information of the known facts of the event.

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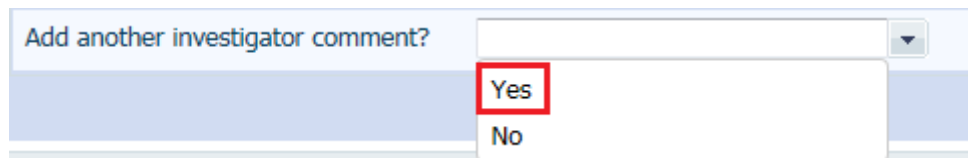
Press 'Save'.

The investigation section has already been completed by another investigator
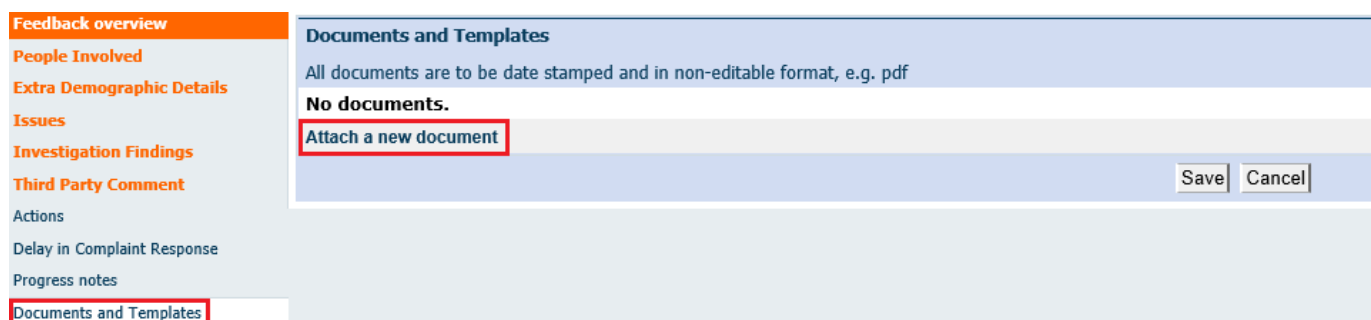
If an investigator accesses the complaint record and the investigation comment is already completed by another investigator, an additional comment section can be generated by changing the answer to 'Add another investigation comment?' to 'Yes'. Up to 10 investigators can comment on any one complaint record.

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'.

A new window will open titled 'Attachment details'.
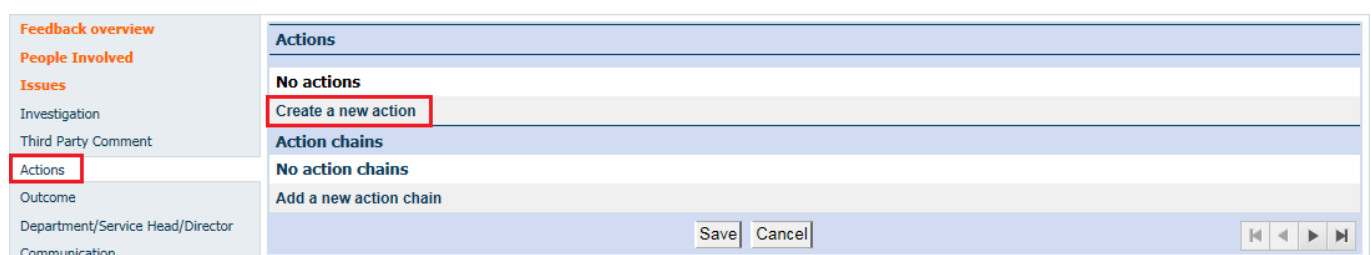
'Link as' identifies the type of document to be attached.

'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 do I record any 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. A recommendation/action is added on the 'Actions' page.

For further details on adding recommendations/actions refer to the WA Health Datix CFM Recommendations/Actions User Guide.

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

Investigators should utilise the 'Communication' page via the menu to notify the Feedback Coordinator once they have completed their portion of the investigation. 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.