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 |
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| 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  |
|  | |
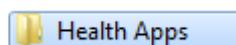
# Security access

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.<br><br>Read only access to CIMS records at their location.<br><br>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.<br><br>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.<br><br>Also have read/write access to CFM records both at their location and assigned to them.<br><br>Access to Dashboard, To Do list and reporting.<br><br>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.<br><br>Also have read only access to CFM records at their location and read/write access when assigned to them.<br><br>Access to Dashboard, To Do list and reporting.<br><br>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.
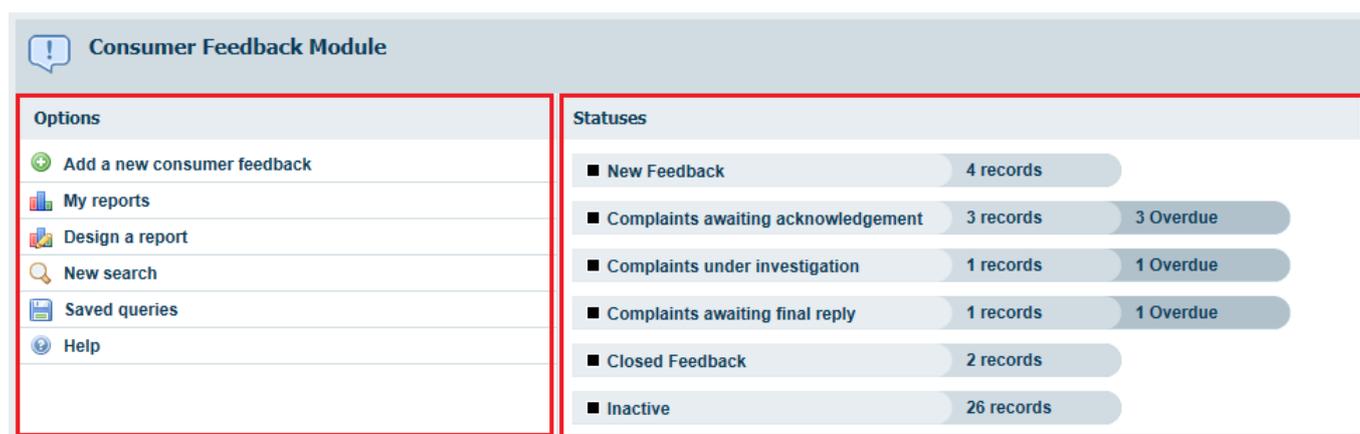


Alternatively those complaint records at a particular status which have overdue elements can be viewed by clicking the number of records displayed as 'Overdue'. As the 'Overdue' label is dependent on correct dates existing in the 'Primary Complainant Chain', these prompts should only be relied upon if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

# 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<br>? Help<br>❓ | 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. |
| ○<br>○ | 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 |
| [icon] | 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. |
| [icon row] [icon row] | Floating menu | Floating menu located at the bottom left of screen with Menu, Save/Submit or Search and Cancel functions. |
| Save Submit [icon row] | 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 [icon row] | Cancel | The cancel function located at the bottom of the forms or in the floating menu (bottom left of page) |
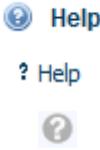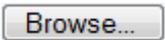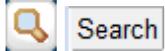
## Timeout Feature

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.
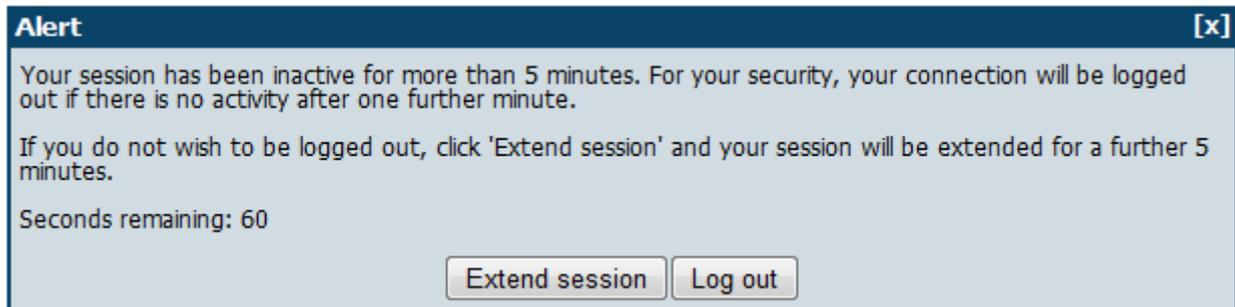
# Third party comment

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'.



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.



From here you can see any other staff who have been requested to provide Third Party Comment and any completed comments.
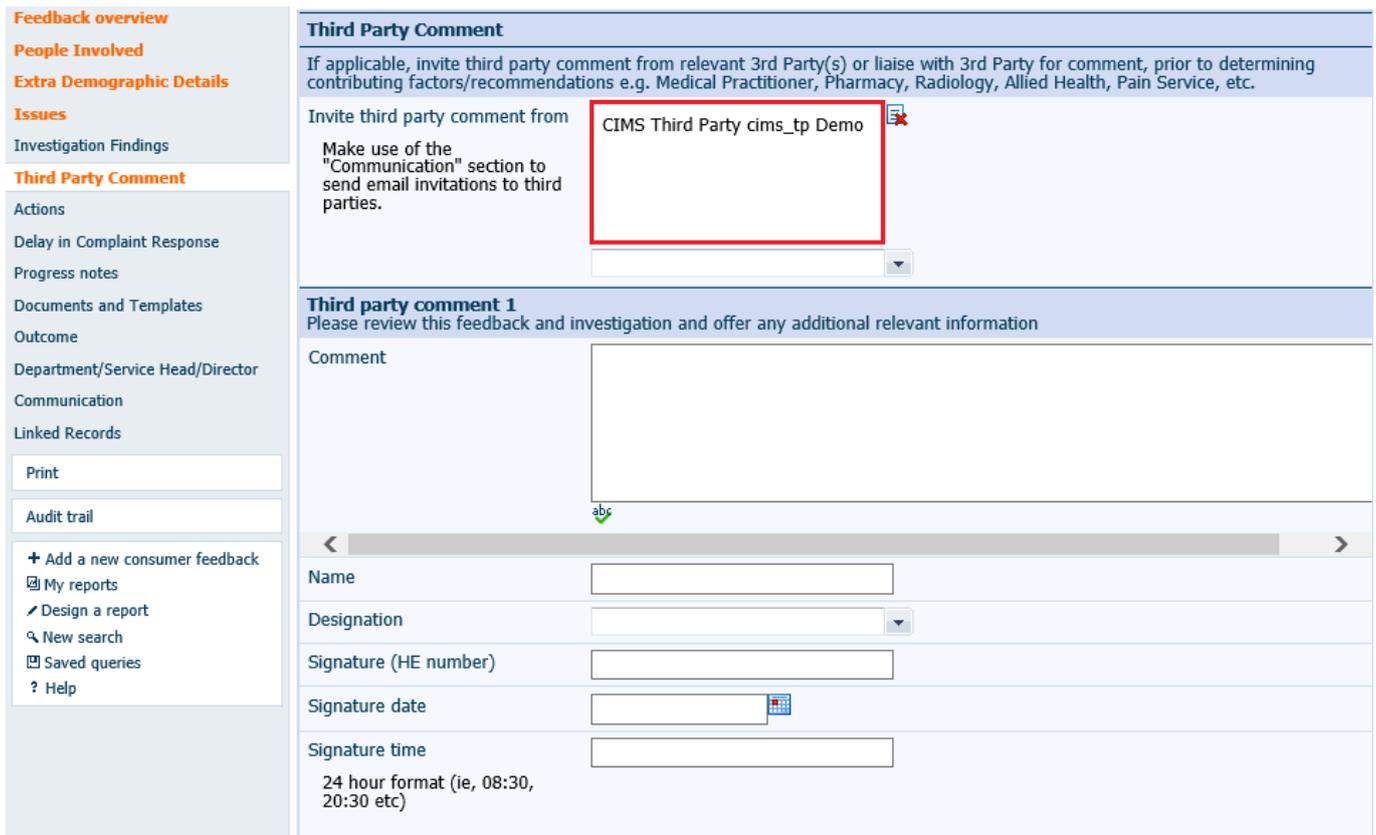
Up to four staff members can be requested to provide third party comment. Navigate to an unutilised Third party comment section and add your comment in the free-text 'Comment' box.

Comment

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 | All documents are to be date stamped and in non-editable format, e.g. pdf |
| Extra Demographic Details | 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 | |
| ★ 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.