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

# Datix Consumer Feedback Module (CFM)

**Notifier User Guide**

June 2021

Version 2.0

**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 |
| 0.2 | N/A | Susan Woolley | Incorporate feedback from Health Support Services |
| 0.3 | N/A | Susan Woolley | Insert feedback from State Datix Committee<br><br>Insert version control table |
| 1.0 | 15/02/2021 | Susan Woolley | Insert feedback from State Datix Committee<br><br>Initial publication |
| 1.1 | N/A | Susan Woolley | Update to reflect changes to Person reporting and Person affected questions |
| 2.0 | 09/06/2021 | Susan Woolley | Approval by State Datix Committee |

# 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 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

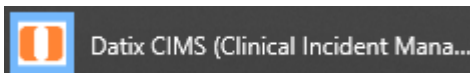| Window 10 Computers | Window 7 Computers |
|---|---|
| To open the application on your computer screen, | To open the application use the Windows icon, |
| click  | click  |
| ➔ Health Apps | ➔ Click All Programs, then click on Health |
|  |  |
| ➔ Datix CIMS icon | ➔ Datix CIMS icon  |
|  | |
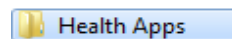
# Security access

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, select the logout option at the top of the screen. Any unsaved work will be lost.
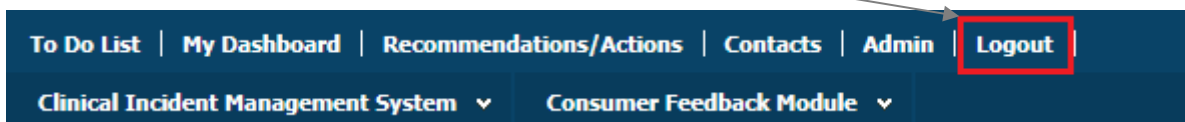
# WA Health Datix CFM Status Screen

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. Only records that the user has permission to view will be displayed. Depending on the user's permission these records may be displayed in read-only format.
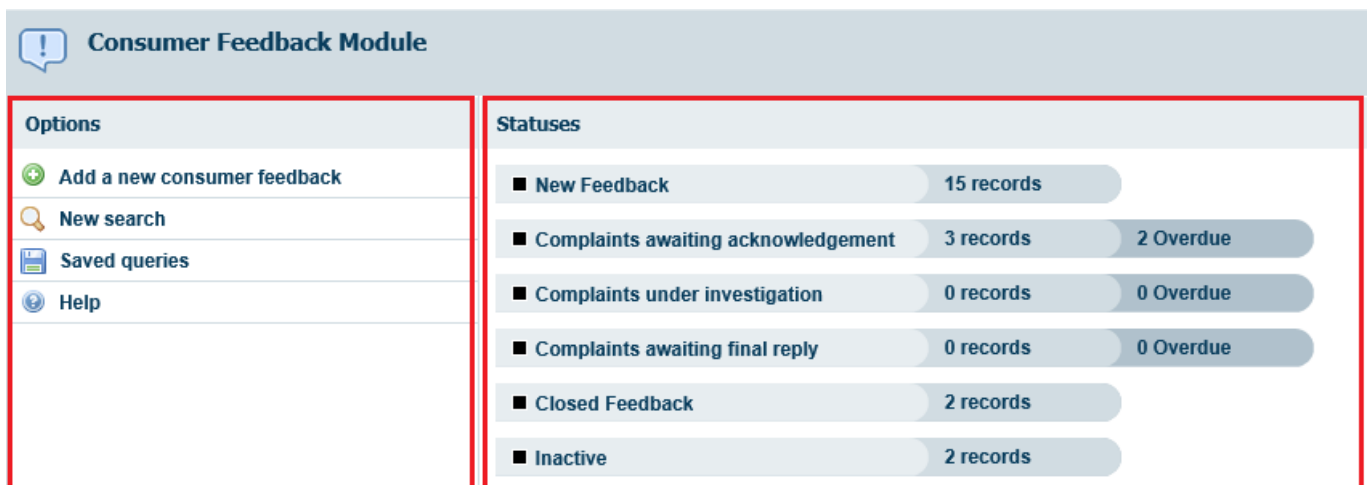
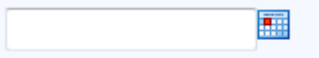| Options | Statuses |
|---|---|
| **Add a new consumer feedback** – click here to open a blank Feedback Notification Form to report a new consumer feedback. | **New Feedback** – Complaints that have been notified but are in 'Pending' status and all open Compliments or Contacts and Concerns. |
| **New search** – click here to search for information within the CFM database. | **Complaints awaiting acknowledgement** – Complaints that are lodged and awaiting acknowledgment to be sent to the complainant by the Feedback Coordinator. |
| **Saved queries** – click here to access previously saved queries. | **Complaints under investigation** – Complaints that are in the process of investigation by allocated investigators. |
| **Help** – click here to access online help information. | **Complaints awaiting final reply** – Complaints with completed investigation/s that are awaiting final communication with the complainant. |
| | **Closed feedback** – Complaints, Compliments or Contacts and Concerns that are closed. |
| | **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 only users with certain security access will be authorised to edit records in the above statuses. Users who only have access to notify consumer feedback will be able to view feedback records they have previously notified in read-only format. |
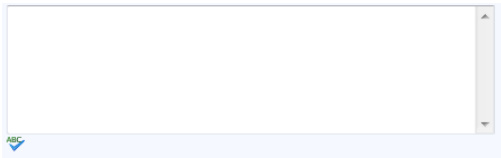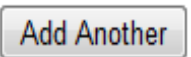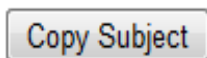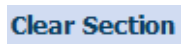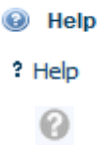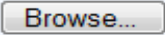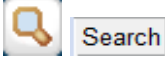
# General navigation information and Datix features

## 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. |
| | 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 |
|---|---|---|
| ☑<br>☐<br>☑ | 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 CFM 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.
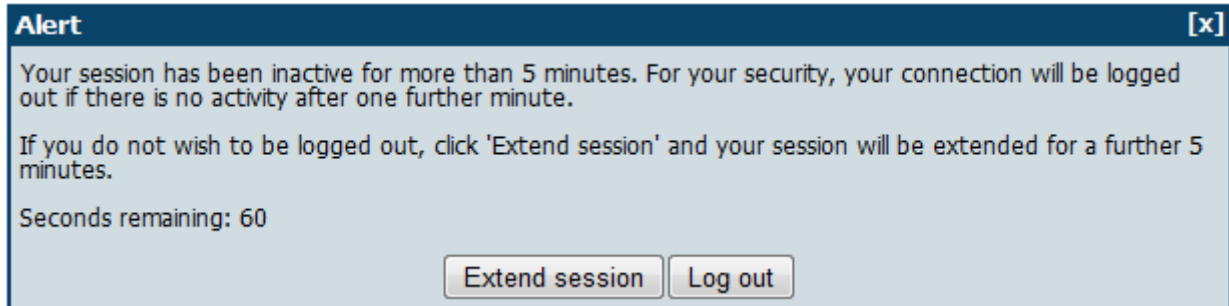
# Notification of Consumer Feedback

To commence recording a reported feedback, click on 'Add a new consumer feedback' from the 'Options' menu to open the 'Feedback Notification Form'.
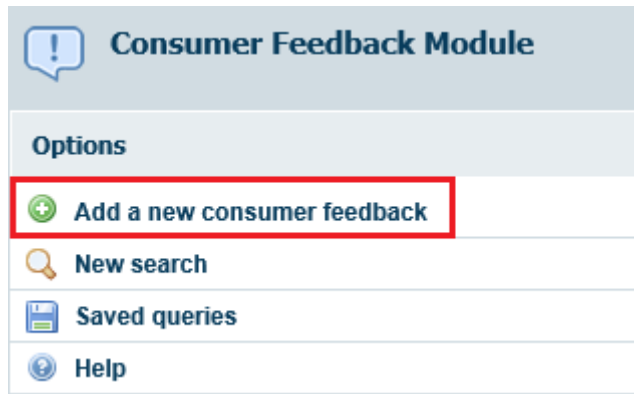


## Feedback notification form

Fields displayed on the feedback notification are dependent on selections made in some fields, e.g. Type of feedback. A navigation menu sits alongside the feedback notification form.



## What is the Type of Feedback?

This set of questions is intended to help guide the notifier to select the correct type of feedback. The first question is mandatory and must be answered. The remainder may be answered if further guidance is required for selection of the 'Type'.

If there are both negative and positive aspects to the feedback these should be entered as two items of feedback. As per the Complaints Management Policy it is mandatory to record all complaints received.

If 'Yes' is selected in the first question then up to five additional questions will appear depending on answers selected:



If 'No' is selected in the first question the following question will appear:



Answering each question will either provide a suggested 'Type' for the user to select or another question will be revealed if further information is required. In the example below if 'Yes' is

selected then 'Complaint' is suggested. If 'No' is selected then the user will be presented with another clarifying question.



Please note the above questions are intended as guidance only and do not replace selecting the 'Type'.

## Type

Select the type of feedback to be recorded from the mandatory single pick list.



### Complaint
An expression of dissatisfaction by, or on behalf of, an individual consumer/carer regarding any aspect of service provided by a Health Service Provider, where a response or resolution is explicitly or implicitly expected or legally required. This includes anonymous complaints.

### Compliment
An expression of satisfaction and/or gratitude by, or on behalf of, a consumer/carer regarding any aspect of a service delivered by a Health Service Provider.

### Contacts and Concerns
An enquiry or feedback from a consumer/carer regarding any aspect of service where a) the contact is inquisitorial in nature rather than an expression of dissatisfaction, or b) the consumer/carer states they do not wish to lodge a complaint, or c) the issue(s) are minor and can be resolved immediately without going through the complaint process.

## Key Dates

As per the Complaints Management Policy, the date the feedback was received by the organisation determines the time frames for acknowledgment and response. The system does not have any validation mechanisms to ensure dates are logical except for preventing future dates from being entered. Care should be taken to ensure dates entered are accurate.

## Date relevant event occurred

If the date the relevant event occurred is known it can be entered here.
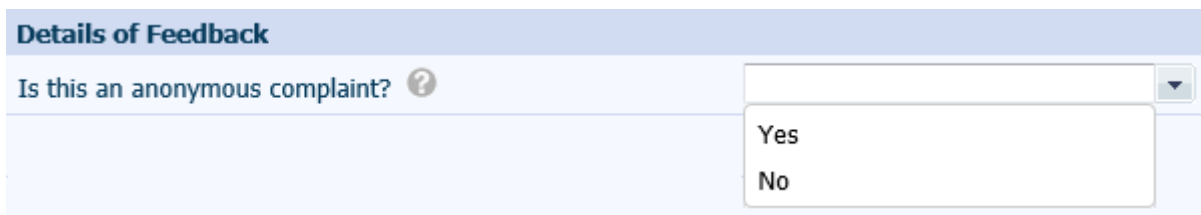
## Date feedback received by organisation

Enter the date the initial feedback was received by the organisation. The Complaints Management Policy outlines the date considered to be the date feedback received by organisation for the various mechanisms by which consumers/carers can provide complaints.

# Details of Feedback

## Anonymous complaints
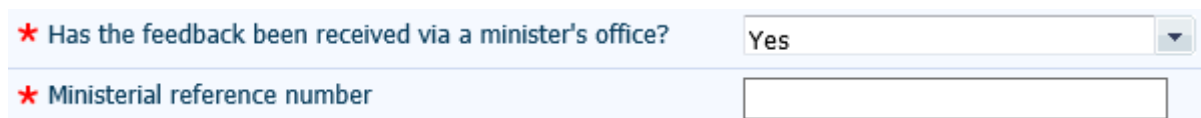
If the feedback has been identified as a 'complaint' a non-mandatory single pick list will appear. Anonymous complaints are complaints where the complainant for whatever reason chooses to withhold identifying details. It is acknowledged that anonymous complaints may not be able to be responded to, but Health Service Providers should never the less work to resolve these types of complaints via service improvement. If an anonymous complaint is received then the instructions under 'Details of person reporting the feedback not known' on page 23 should be followed. If the person reporting later makes themselves known then the answer to this question should be changed and their details entered. The 'Details of the person affected' should be also be treated as unknown as it is not possible to obtain authorisation to release information if the person reporting is anonymous.

| Details of Feedback | |
|---|---|
| Is this an anonymous complaint? ② | ▼ |
| | Yes |
| | No |

## Ministerial feedback

If the 'Type' of feedback has been identified as a 'complaint' or 'contacts and concerns' a mandatory single pick list will appear prompting the notifier to state whether the feedback is ministerial feedback. If 'yes' is selected, another mandatory free text box will appear requesting the 'Ministerial reference number'. This field can be searched via the search form so an accurate reference number should be entered to facilitate this.

| ★ Has the feedback been received via a minister's office? | Yes ▼ |
|---|---|
| ★ Ministerial reference number | |

All ministerial feedback should be entered in to Datix CFM. **Feedback that is ministerial in nature is not necessarily a complaint**.

## Feedback received via an advocacy group

If the feedback has been identified as a 'complaint' a non-mandatory single pick list will appear prompting the notifier to state whether the feedback has been received via an advocacy group on behalf of a consumer. If 'yes' is selected, another non-mandatory free text box will appear

requesting the details of the advocacy group. This field can be searched via the search form so accurate details should be entered to facilitate this.

| | |
|---|---|
| Has the feedback been received via an advocacy group on behalf of a consumer? ⑦ | Yes ▾ |
| Provide details of advocacy group, reference number, and contact details | |

## Method of lodgement

Select the method by which the consumer lodged the feedback from the single pick list.

| ⭐ Method of lodgement ⑦ | ▾ |
|---|---|
| | Care Opinion |
| | e-Form |
| | Email |
| | Fax |
| | Feedback form |
| | In person |
| | Letter/Card |
| | Social media |
| | Telephone |
| | Other |

If Care Opinion is selected a free text box will be revealed providing the opportunity to record the Care Opinion reference number. This field can be searched via the search form so accurate details should be entered to facilitate this.

| ⭐ Method of lodgement ⑦ | Care Opinion ▾ |
|---|---|
| Care Opinion reference number | |

## Summary of events

The summary of events is a free text box in which a description of the feedback is written. Do not use names or identifiers in this free text field. This should be a **brief and informative outline of the feedback** to optimise search and analysis functions. More descriptive details can be attached to the feedback record as a separate document. Include what happened, who was involved, when and where did it happen. Be specific about times and dates and avoid statements like 'next week' or 'last month'. Do not use abbreviations, patient or staff names.

| ⭐ Summary of events | Description of feedback to be written here |
|---|---|
| Feedback received should be treated as legitimate and treated without prejudice. | |
| Provide information of the reported facts of the event(s) so that somebody with no knowledge of the situation can understand it. DO NOT simply write 'Refer to attached document'. | |
| Avoid statements that blame or identify individuals. Avoid second guessing what might have happened. | |
| DO NOT include consumer or staff member names but DO include their designation. Avoid abbreviations. DO NOT make any reference to the complaint in a patient's medical file. | |

## Intent of compliment

If the feedback has been identified as a 'compliment' a set of non-mandatory square tick boxes will appear prompting the notifier to select the intention of the compliment. Several tick boxes may be selected.

| Intent of Compliment | ☐ Compliment related to named staff |
|---|---|
| | ☐ Compliment related to overall service |
| | ☐ Thank you |

## Preferred method of contact

If the feedback has been identified as a 'complaint' or 'contacts and concerns' a non-mandatory single pick list will appear prompting the notifier to state what the preferred method of contact is for the person reporting the feedback. This will indicate to the Feedback Coordinator how they should interact with the person reporting the feedback through resolution of the feedback.

| Preferred method of contact | ▼ |
|---|---|
| If face-to-face or telephone is the preferred method of contact for the person reporting, a written record of conversations must be maintained and attached to the feedback record. | E-mail |
| | Face-to-face |
| | Letter |
| | Not specified |
| | Telephone |

## Mental health episode of care?

The Mental health episode of care refers to the services about which the person is lodging the feedback. The help icon contains a definition for clarification:

Mental health episode of care refers to the services about which the person is lodging the feedback. Mental health service includes:

a) any service provided by a mental health practitioner acting in his/her capacity as a mental health practitioner; and/or

b) any service provided in psychiatric hospitals; or in designated psychiatric units in acute hospitals; or in services whose primary function is to provide treatment, rehabilitation or community health support targeted towards people with a mental disorder or psychiatric disability.

| ★ Mental health episode of care? ❓ | ▼ |
|---|---|
| | Yes |
| | No |
| | Not applicable |
| | Unknown |

'Yes' should be selected for any episode of care provided by a Mental Health Service.

'No' should be selected if the episode of care is not a mental health episode of care, i.e. general health episode of care.

'Not applicable' should be selected if the feedback is not directly related to an episode of care, e.g. parking availability.

'Unknown' should be selected if the feedback is related to an episode of care but it is not known whether the care is mental health or general health.

## Reply timeframe

If the feedback is a complaint, a reply timeframe of 30 working days will be displayed. This is in accordance with Complaints Management Policy, which states that Health Services shall resolve complaints within 30 working days following receipt of the complaint.

## Location of primary event

It is recognised that one item of feedback may cover several events across several locations. In a feedback record, the primary event is that which is judged to be the most serious in nature. The location at which this event occurred should be entered in this field.

The location entered in this field will affect which users are able to view the feedback record. **Private hospitals and health services should not be selected in this field.** These services do not have access to Datix CFM or CIMS. These organisations exist in the WA Health Organisational Tree for purposes related to Datix CIMS. If an incorrect location is entered in this section that prevents appropriate users from accessing the record, it can be corrected by either:

- requesting the feedback coordinator to amend the location, or;
- placing a service call with CIMS Support quoting the Datix ID and explaining the requested change.

This field consists of six location tiers comprised of single pick lists, five of which are mandatory, with an additional free text box for 'Specific location'. The pick lists are based on the WA Health Organisational Tree and are regularly updated. If a required location is not available in the Organisational Tree, contact your SQP team.

The six tiers have a downward parent-child relationship which means that a selection entered in a tier will filter the options available for the next tier down. For example, entering the 'Organisation' will restrict options in the pick list for 'Health Service', but not 'Service'.

The six tiers also have an upward autofill function. For example, entering 'Place of Incident / Event' will cause the rest of the tiers to autofill, whereas entering 'Health Service' will only cause 'Organisation' to autofill.

Selections can be deleted from tiers by highlighting the text and pressing backspace or delete on the keyboard, or by clicking into the tier and presing the cross ✕ that appears.

## Details of the person reporting the feedback

This section accomodates the details of the person reporting the feedback. This may be the person who has been affected by the event or they may be reporting the feedback on behalf of another person that has been affected.

If the feedback has been received from an official body (e.g. HaDSCO, Minister for Health, etc.) following contact from a consumer/consumer representative, then **the details of the consumer/consumer representative originally raising the feedback should be entered** in this section. Details of the official body can be entered by the Feedback Coordinator once the feedback has been submitted.

If several people are involved in reporting the feedback, enter the details of the person that the service actually received the feedback from or has had most interaction with. Additional persons can be added to the record by the Feedback Coordinator once the feedback has been submitted.



### Date feedback received from person reporting

Enter the date the Health Service Provider has received the feedback from the person reporting the feedback e.g. the date the person reporting emailed the feedback or posted it on a website. It is likely this will be the same date as the 'Date feedback received by organisation' outlined on page 17.

### Person reporting vs Person affected by the feedback

The question 'Are the person reporting the feedback and the person affected the same person?' determines whether there is only one person involved in the feedback or more than one person. If the person reporting the feedback is reporting on behalf of or about the care received by someone else, then the person reporting the feedback and the person affected are not the same people. Select 'No'. A field will be generated asking about the relationship between the

person reporting and the person affected. For example, a daughter may complain about her mother's care. Later a second section will be revealed to enter details of the person affected by the feedback as outlined on page 25.

If the person reporting the feedback is reporting on their own behalf about care they have received, then the person reporting the feedback and the person affected are the same person. Select 'Yes'. This will mean the question asking about the relationship between the person reporting and the person affected is not generated, because they are the same person. For example, a patient may complain about their own level of care, a complaint is received via an advocacy body from a patient complaining about the waiting list time for their appointment, or a visitor may complain about the price of food at an onsite food outlet.

## Relationship of person reporting the feedback to the person affected

If the person reporting the feedback is not also the person affected (i.e. they are different people) a secondary single pick list will be generated asking the relationship of the person reporting the feedback to the person affected. For example a daughter may complain about her mother's care, in which case Relative would be selected.



If the person reporting the feedback is also the person affected by the feedback, then there is no relationship between the two because they are the same person. If this occurs, review the answer to 'Are the person reporting the feedback and the person affected the same person?'

## Unique Medical Record Number (UMRN) is available

If the person reporting the feedback is the person affected and is a WA Health patient with an UMRN, enter this in the 'Record/patient number' field and click 'Search' to check for matching contacts. If a matching contact is available, click 'Choose'. Once the matching contact has been chosen, the remaining fields will auto-populate with details retrieved from WebPAS. If a matching contact is not available, close the search box and refer to the section below, Unique Medical Record Number (UMRN) is not available.



If the person reporting the feedback is not the person affected do not search by UMRN. Follow the below section 'Unique Medical Record Number (UMRN) is not available'.

## Unique Medical Record Number (UMRN) is not available

If the person reporting the feedback does not have an UMRN, the notifier should manually populate the fields with the available information, leaving 'Record/patient number' blank.

## Details of person reporting feedback not known

If details of the person reporting the feedback are not known, leave all optional fields blank and complete the two mandatory fields only. These are:

- Last name – enter 'Unknown'. Do **not** enter 'Anonymous', 'Not reported' or similar. It is important for reporting purposes that treatment is consistent across users.
- Gender – enter 'Not stated/Unknown gender'.

## Additional demographic details of the person reporting

Separated from the main section of details of person reporting the feedback by a thin blue line is a series of additional demographic questions. These questions should be answered when the information is known to assist in identifying trends in vulnerable groups.



## What is the main language, other than English, spoken at home by the person reporting the feedback?

Select the language most frequently spoken at home by the person reporting the feedback. This question intends to capture the diversity of the Health Service Provider's customer/client base. They may or may not require an interpreter if a language other than English is the main language spoken at home.

## What is the person reporting feedback's preferred language of communication?

Select the language the person reporting the feedback prefers to communicate in. A customer/client may be fluent in English and therefore not require an interpreter but still prefer to communicate in another language.

## What is the person reporting the feedback's preferred pronoun?

Select the pronoun the person reporting the feedback has stated they would prefer to be used in all correspondence relating to their feedback.

| What is the person reporting the feedback's preferred pronoun? | ▾ |
|---|---|
| | He/Him/His |
| | She/Her/Hers |
| | They/Them/Theirs |

## What is the person reporting the feedback's preferred name?

Select the name the person reporting the feedback has stated they would prefer to be used in all correspondence relating to their feedback.

## What disabilities were identified by the person reporting?

If the person reporting the feedback/person affected identifies any disabilities, select these from the multi pick list. These must be reported by the individual involved and must not be assumed or observed by the staff receiving the feedback.

## Does the person reporting require any assistance in communication regarding their feedback?

If any disabilities have been identified by the person reporting then an additional free-text box will be revealed. Record any assistance the person reporting may require in order to ensure equity in the feedback process.

| Does the person reporting require any assistance in communication regarding their feedback? | |
|---|---|

## Is the person reporting the feedback a child or young person?

The National Office for Child Safety have published the National Principles for Child Safe Organisations which outline an approach to promoting a culture of child safety and wellbeing within organisations. Principle 6 relates to the establishment and maintenance of child focused complaints systems. A Complaint Handling Guide has been published to assist organisations achieve components of principle 6.

If the person is 17 years or younger, answer 'Yes' and two further questions will be revealed.

| Is the person reporting the feedback a child or young person? | Yes ▾ |
|---|---|
| Has the involvement of the child or young person in the process been planned? | ▾ |
| Is the development of a child safety investigation plan required? | ▾ |

## Is the person reporting the feedback supported by any advocacy groups? E.g. MHAS, HCC

Some people who place feedback may be supported by an advocacy group. Advocates may act on behalf of an individual or provide support in another capacity. If 'Yes' is selected then an

additional free-text field will be revealed where the details of the advocacy group can be recorded. Include here details such as the name of the advocacy group and contact details.



## People Involved

This section determines whether details need to be recorded for the person affected by the feedback. If the person affected by the feedback is a different person to the person reporting the feedback, their details will need to be recorded and 'Do you need to add details for the person affected?' should be answered 'Yes'.



If 'Yes' is selected, the section 'Details of the person affected by the feedback' will be revealed.

If the person affected by the feedback is reporting the feedback on their own behalf then their details would have already been captured in the details of the person reporting the feedback section. Therefore 'No' should be selected.

---

If you are adding details that you have already added in the details of person reporting the feedback section then there has been an error. Review your answers to 'Are the person reporting the feedback and the person affected the same person?' and 'Do you need to add details for the person affected?'

As a rule of thumb:

- if 'Are the person reporting the feedback and the person affected the same person?' is answered 'Yes' then 'Do you need to add details for the person affected?' should be answered 'No', and vice versa,
- if 'Are the person reporting the feedback and the person affected the same person?' is answered 'No' then 'Do you need to add details for the person affected?' should be answered 'Yes'.

---

## Details of the person affected by the feedback

If the person reporting the feedback is not also the person affected by the details of the feedback then details for the person affected by the feedback need to be captured in the record. If the question 'Do you need to add details for the person affected?' is answered 'Yes' then a section to record the details of the person affected by the feedback will appear. Follow the instructions for entering the details of the person affected outlined in 'Details of the person reporting the feedback' commencing from 'Unique Medical Record Number (UMRN) is available' (page 23). If there is more than one person affected these details can be added by the Feedback Coordinator once the record has been submitted.

## Additional demographic details of the person affected

Separated from the main section of details of person reporting the feedback by a thin blue line is a series of additional demographic questions. These questions should be answered when the information is known to assist in identifying trends in vulnerable groups. Follow the instructions for entering the details of the person affected outlined in 'Additional demographic details of the person reporting the feedback'.

## Immediate action

If the feedback has been identified as a 'complaint' or 'contacts and concerns' a non-mandatory section will be revealed that captures any actions that may have been taken by the notifier at the time of reporting or situations where an immediate action may be necessary.



### Potential for serious implications

The question 'Does the feedback have potential for serious patient safety, legal, political, financial, or media implications?' aims to identify consumer feedback items that need to be escalated immediately. Selecting 'Yes' will cause an email to be generated when the record is submitted that will alert appropriate senior staff about the feedback item.

### Immediate action taken

The question 'What immediate action has been taken?' enables the notifier to record the details of any actions they took immediately after receiving the feedback from the consumer. Record enough detail so that someone not familiar with the actions can understand what has occurred. This will enable further necessary actions to be determined and may also form part of a response to a person reporting feedback.

## Documents

Additional information associated with the consumer feedback information may need to be added. Ticking the box 'Would you like to attach any documents?' will open the document attachment function.

'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.

'Add another' allows for additional documents to be added.

**Documents** - All documents are to be date stamped and in non-editable format, e.g. pdf

| | |
|---|---|
| Would you like to attach any documents? | ☑ |

**New Document**

| | |
|---|---|
| ★ Link as | [ ▼ ] |
| ★ Description | [ ] |
| ★ Attach this file | [ ] Browse... |

[ Add another ]

## Details of person lodging the feedback

Details of person lodging the feedback auto-populate. Confirm your details are correct prior to submitting the feedback. If there are any errors click 'Clear Section' which will enable all fields to be manually completed.

**Details of person lodging the feedback**

| | Clear Section |
|---|---|
| Last name | Demo |
| First name | cfm_co |
| Designation | Feedback Coordinator (Service) |
| Email address | datixtest@health.wa.gov.au |
| Telephone number | [ ] |

## Submitting consumer feedback

Pressing 'submit' will cause the feedback to be recorded in the system and move the record to 'New Feedback' ready for review by the nominated feedback coordinator.

[ Submit ] [ Cancel ]

When submitted successfully, the screen will display the unique identifying 'CFM reference number' and display the name of the coordinator who received a notification email.



## Viewing notified feedback

Notifiers can view feedback they have notified by logging in to the system and accessing notified feedback via the 'Statuses' menu or by searching for the 'CFM reference number'.