Datix Consumer Feedback Module (CFM)

Searching, Reporting and Dashboard User Guide

December 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		Susan Woolley	Initial document – Publication of working draft
0.2		Susan Woolley	Inclusion of feedback from State Datix Committee
1.0	December 2021	Susan Woolley	Approved for publication 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.

Purpose of this Guide

This user guide has been prepared for **senior staff** (i.e.: Senior Staff or Consumer Feedback Coordinator profile level access or higher) to assist with consumer feedback reporting requirements.

The objectives of the guide are to describe the processes for:

1. Searching for records within DatixWeb.
2. Creating reports within DatixWeb.
3. Managing reports.
4. Creating dashboards in DatixWeb.
5. Managing dashboards.
6. Managing dashboard reports.
7. Describe the functionality of Rich Client (Advanced) reporting module

Recommended Pre-Reading

The following user guides are recommended pre-reading:

1. Datix CFM Notifier User Guide.
2. Datix CFM Coordinator User Guide.

Users who are not familiar with the system should refer to the above documents, available on the HSS CIMS Application intranet page: https://wahealthdept.sharepoint.com/sites/hss-customer-ict-hosp-admin/SitePages/cims.aspx

About this Guide

1. In this guide, the web-based Datix CFM application, 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:

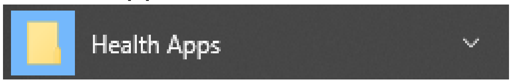
Accessing WA Health Datix CFM

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.

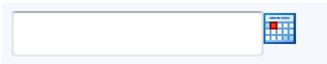
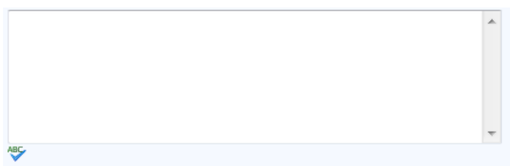
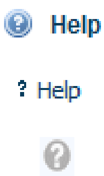
User profiles need to be assigned to individual users of the system. Group email addresses should not be used.

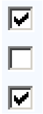
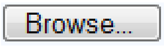
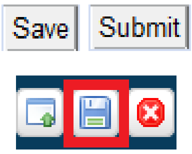
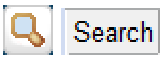
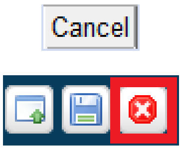
Datix CFM Profile	Security access description
Feedback Notifier	Have permission to input/notify data into both CFM and CIMS and read only access for records that they have notified.
Feedback Coordinator	Have read/write access to input data, apply recommendations/ actions, access to assign to or be assigned 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.

General Navigation Information

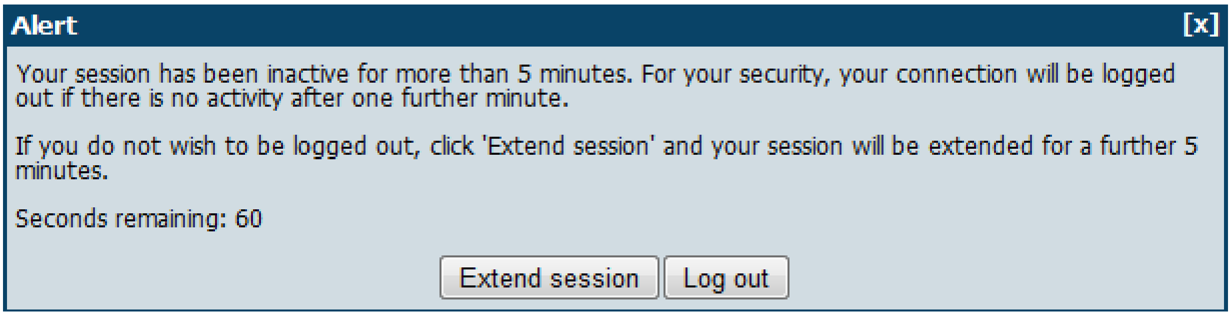
A number of features are common to many areas of the WA Health Datix CFM.

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.
	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 is 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.
	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

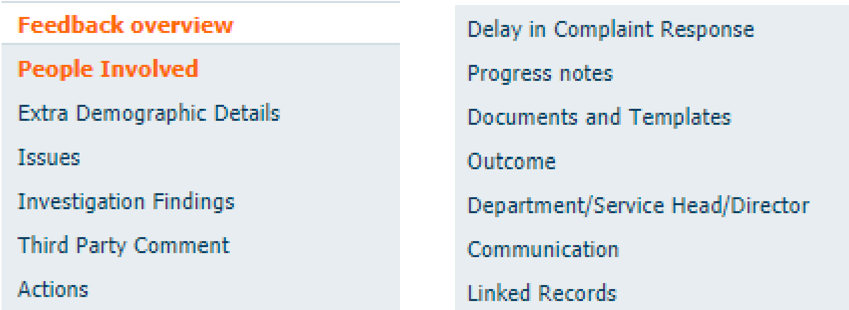
In order to maintain system security, the WA Health Datix CFM will automatically end a session if it has been inactive for 5 minutes. Once the time limit has been reached, a message will appear on the screen advising that the session will be ended unless the option to "Extend session" is selected.



Terms Used in this Guide

A number of terms are frequently used through this guide that refer to the technical structure of the Datix CFM. These terms are **page**, **form**, **field**, and **value**.

'**Page**' refers to the multiple pages available for navigation to the left of the 'Feedback Management Form', i.e. once feedback has been submitted.



'**Form**' is used in two contexts.

- Firstly 'form' refers to the Feedback Notification Form, the user interface used to notify feedback, and the Feedback Management Form, the user interface used after the feedback has been notified.
- Secondly 'form' refers to the options available in the pick-lists in Report Designer. The majority of users do not need to know anything about the technical aspect behind this organisation, except for how to use the 'form' to find the 'field' they are wanting to report on. The location of fields commonly reported on are outlined in Appendix III.

'**Field**' relates to the specific data-entry field on the form, e.g. 'Type', 'Issue Category Tier 1', and 'Resolution'.

'**Value**' refers to the options for selection within a field (where the field is a pick-list), e.g. 'Complaint'.

Searching for Records

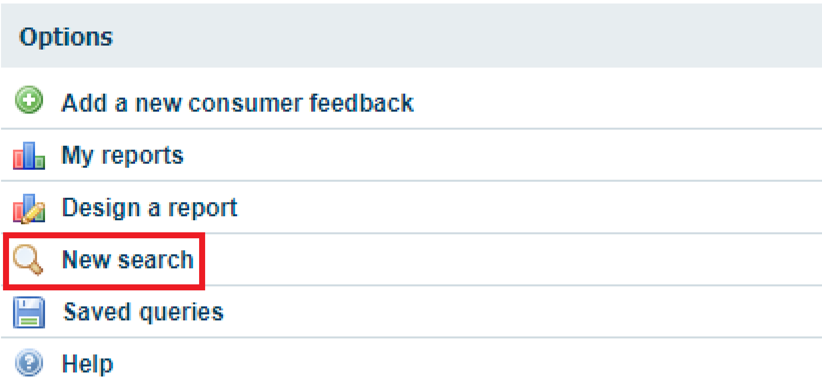
Any search you run will only include data for the location you have access to in Datix CFM.

Most fields within *DatixWeb* can be used to search for data, including free-text fields, pick-lists, date fields, and radio buttons. A search can involve selecting criteria from multiple pages:

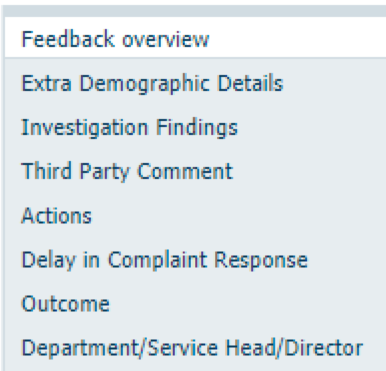
- Feedback overview (includes Issue categories and location)
- Extra demographic details
- Investigation findings
- Third Party comment
- Delay in Complaint Response
- Outcome
- Department/Service Head Director.

For example, a search may include criteria from the Feedback overview, Issues, and Outcome pages. To search for records:

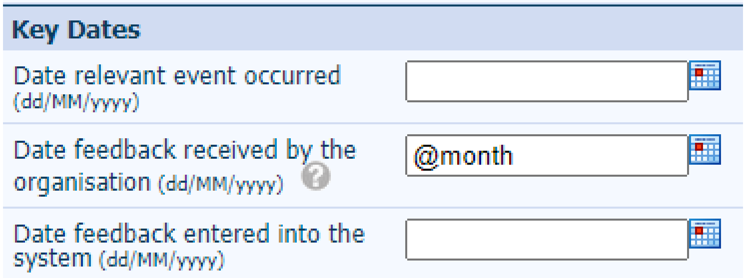
1. Select New search.



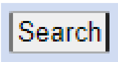
2. Select the page that contains the first field you want to search on.



3. Enter the search criteria:
   - Multiple fields can be used and will narrow down the search.
   - Symbols and date ranges will assist in defining search requirements (refer to Appendix I and Appendix II, pages 40-42). For example, by entering @month in the Date feedback received by the organisation field, all consumer feedback that was received in the current month will be returned. Alternatively, by entering *SMITH* in the Name field, all consumer feedback where the person affected by the feedback's name contains Smith will be returned.



4. To further refine the search using another page, select the next relevant page and enter the search criteria. Repeat this process for each page as required.

5. Click the Search button  or the magnifying glass icon 

6. A list of records which match your search criteria will be returned. This page cannot be printed or exported at this stage – a report needs to be created in order to do so (see Reporting). The maximum number of records that can be displayed at one time is 20. To scroll between the pages, click Next page or Previous page.

7. To view a displayed record, select it from the returned list by clicking the blue text.

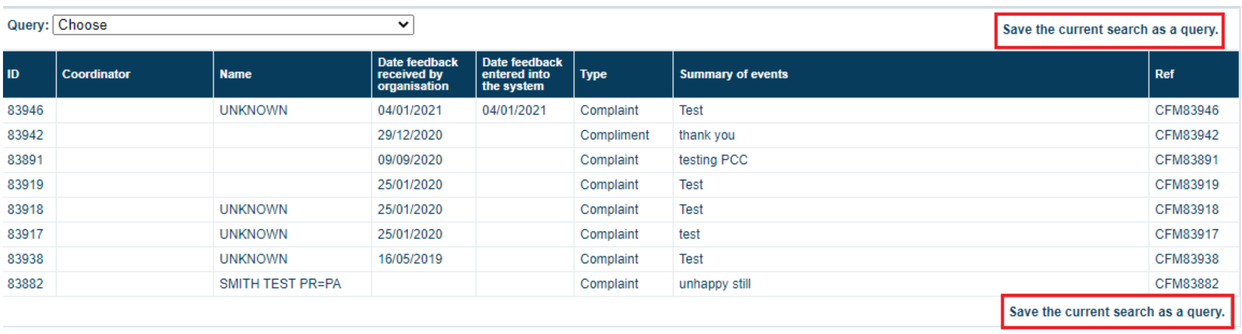
> Searching Tip: Some fields are only displayed once the 'Type' is selected. For example the field 'Is this an anonymous complaint?' will only display on the search form if 'Type' is selected as 'Complaint'.

> Searching Tip: If you are wanting to search on Actions refer to the 'WA Health Datix CFM Recommendations Actions User Guide' available from the Datix CIMS & CFM HSS Hub.

Saving a search

The search can be saved for future/repeated use if required. If the search does not need to be saved as a query, move on to Reporting.

1. Save the search by selecting Save the current search as a query, located at the top or bottom of the returned records list.



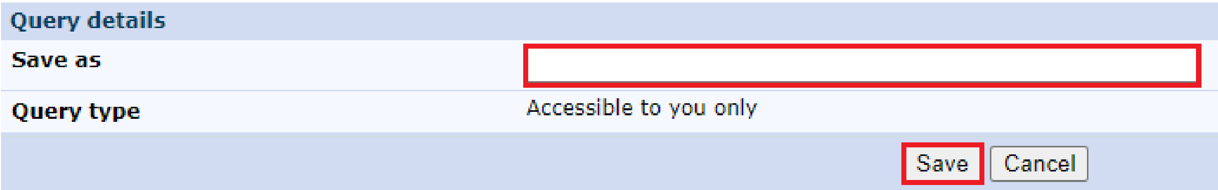
Query: Choose

Save the current search as a query.

ID	Coordinator	Name	Date feedback received by organisation	Date feedback entered into the system	Type	Summary of events	Ref
83946		UNKNOWN	04/01/2021	04/01/2021	Complaint	Test	CFM83946
83942			29/12/2020		Compliment	thank you	CFM83942
83891			09/09/2020		Complaint	testing PCC	CFM83891
83919			25/01/2020		Complaint	Test	CFM83919
83918		UNKNOWN	25/01/2020		Complaint	Test	CFM83918
83917		UNKNOWN	25/01/2020		Complaint	test	CFM83917
83938		UNKNOWN	16/05/2019		Complaint	Test	CFM83938
83882		SMITH TEST PR=PA			Complaint	unhappy still	CFM83882

Save the current search as a query.

2. The Query Details form will open. Name the query with a suitable name that accurately reflects the query structure, as it's not possible to view the original search criteria that were used. For example the name could include the feedback type, the location of primary event, date range of the search or lodged or closed records.



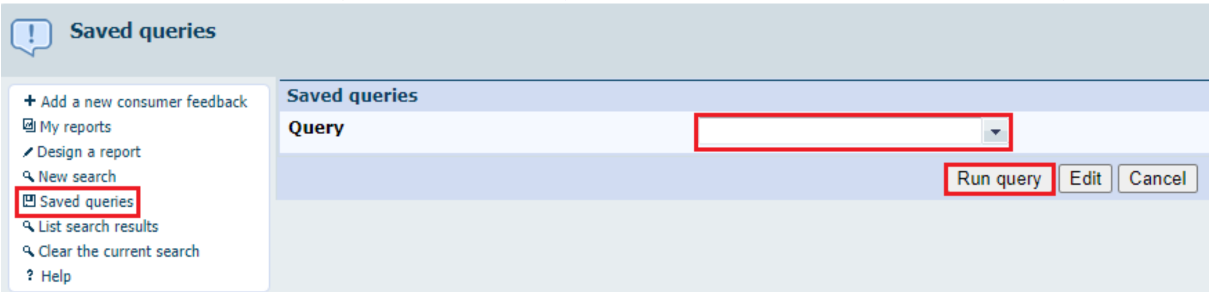
3. Click Save.

The saved query can then be used in Design a Report to display and export the information.

Running a Saved Query

1. To view saved queries, select Saved Queries.

2. Select the relevant query from the Query drop-down list and click Run query.



The list of saved queries will contain any queries that you have previously saved as well as a comprehensive list of statewide queries. Details about these statewide queries are outlined in the '**Datix CFM Statewide Queries and Reports**' spreadsheet available from the Datix CIMS & CFM HSS Hub.

There are currently 46 statewide queries. These are split into:

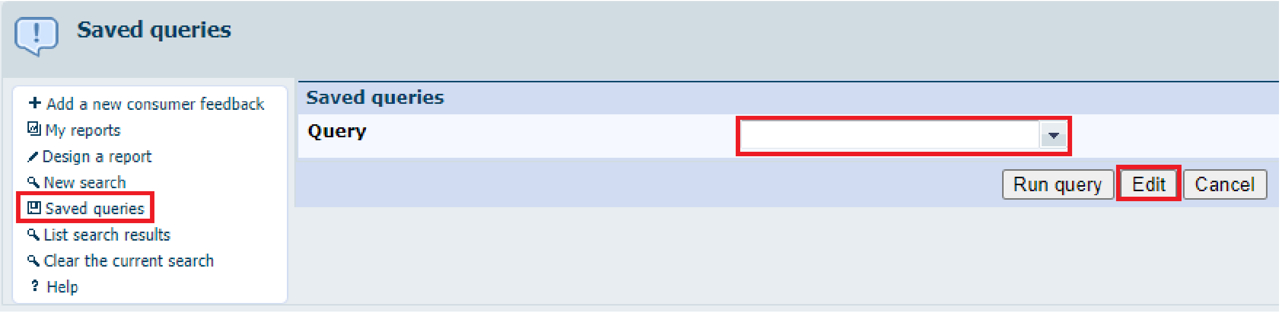
- current queries, of which there are 20, prefixed with a number from 01 to 20, and
- queries relating to the design of CFM prior to the extensive changes made at the beginning of 2021, prefixed with 'Pre-2021'.

It may be necessary to use a combination of queries if reporting for a period that spans 2021 and prior years. These queries would have to be run and reported on separately.

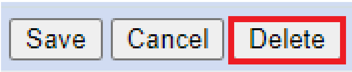
Editing a Saved Query

1. To edit a query, select Saved Queries.

2. Select the relevant query from the Query drop-down list and click Edit.



3. Only the query name can be changed – not the contents. Save the changes to the query name when editing is complete. Alternatively the query can be deleted by clicking Delete.



Reporting

Generating reports in *DatixWeb* can be performed in two ways:

1. Design a report – design a report from one of the nine types of reports (bar chart, crosstab etc) after running your own query or selecting to run a statewide query.
2. My reports – pre-defined statewide listing reports with built-in queries. This page also contains any reports designed and saved by the user.

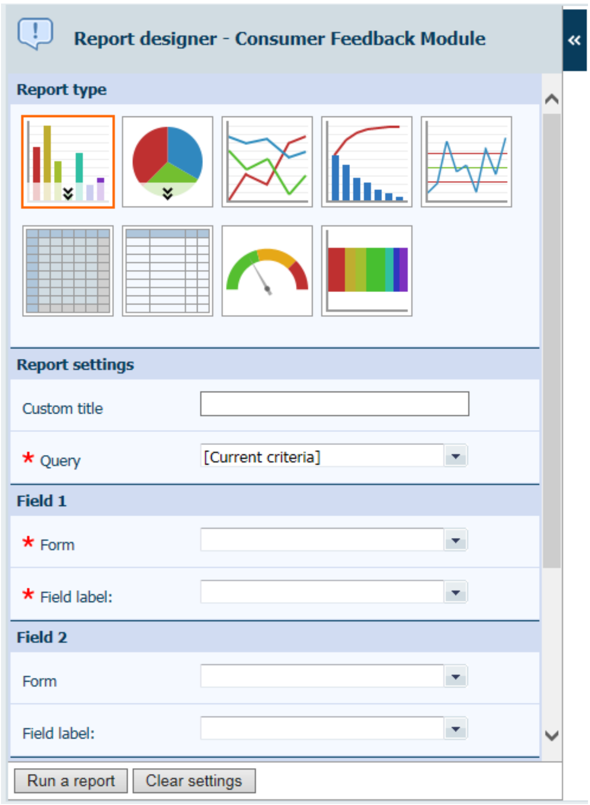
Design a Report

Once a search or query has been run the resultant data can be presented in a report. The 'Design a report' option in the main menu enables the creation of text and graphical reports.

'Report designer' is the tool used for developing a report from your search or query. This can be done in a number of ways. The available report types are:

- Bar chart – vertical, horizontal, and stacked
- Pie chart – standard and exploded
- Line graph
- Pareto graph
- SPC chart
- Crosstab report (text report)
- Listing report (text report)
- Gauge chart
- Traffic light chart

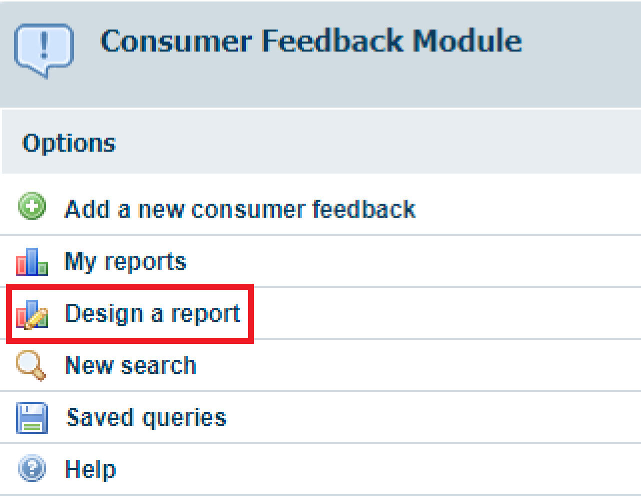
The type of report selected will provide different options in the 'Report settings' section.



To custom design a report:

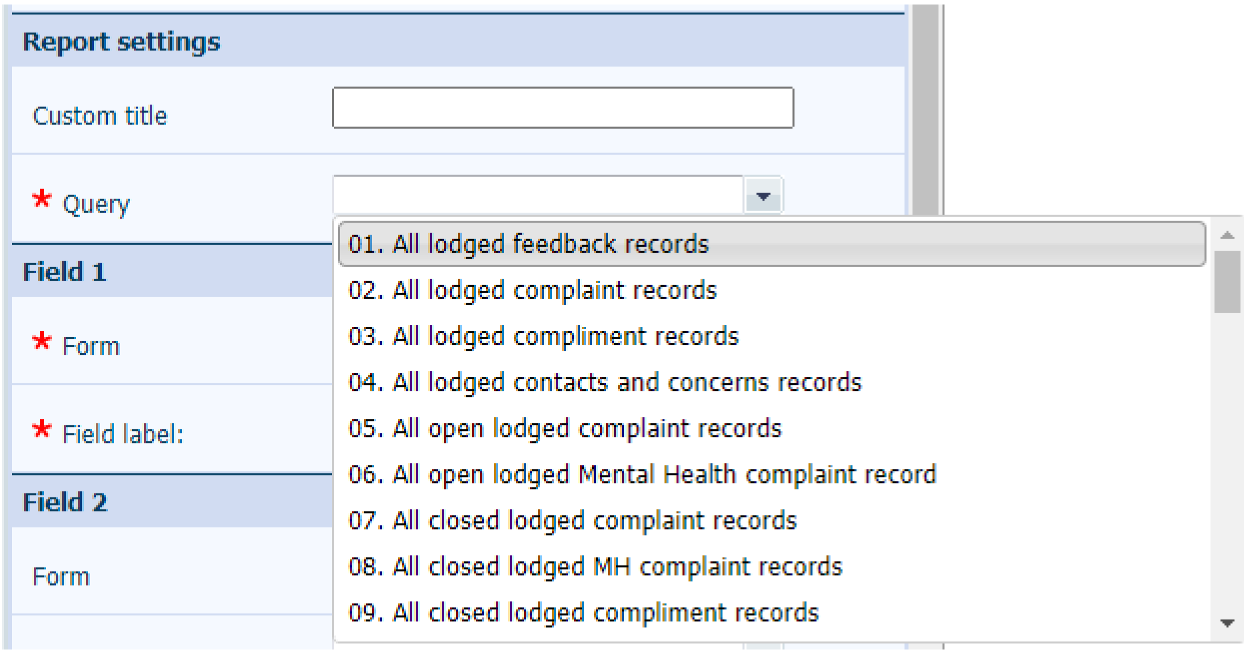
Users with Senior Staff or Consumer Feedback Coordinator level access (or higher) can create reports.

1. Select ‘Design a report’.



2. On the ‘Report designer’ page, select the type of report required from the ‘Report type’ section (each report is described on pages 20-34).

3. Enter the ‘Custom title’ and select a ‘Query’ on which to base the new report from the ‘Report settings’ section. Alternatively a custom search can be performed prior to selecting ‘Design a report’ (Step 1).



Pre-defined queries are displayed in the Query drop-down list. These queries must be approved by the State Datix Committee. This list will also contain any queries you have designed and saved to be accessible to you only.

4. Based on the report type that you selected, configure the other parameters for your report design.

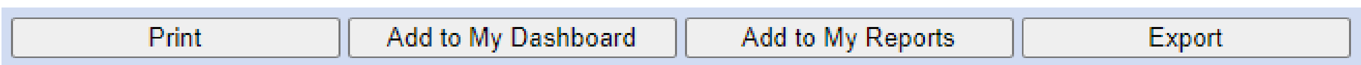
5. Click 'Run a report' - *DatixWeb* will compile your report.

6. If you wish to change the parameters of a report after you have already run a report, make the changes and click the 'Update report' button. (Note: if you have not already run a report the 'Update report' button will not be visible but the 'Run a report' button will be).

Next steps

Once a report has been generated it can be:

- Printed (not available for crosstabs or listing reports).
- Added to a dashboard.
- Added to My Reports.
- Exported to Microsoft Excel or PDF.



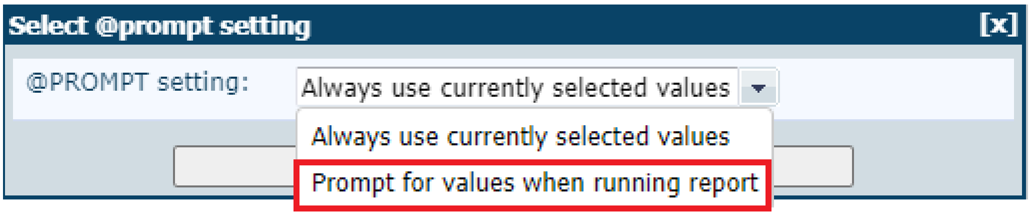
Printing Reports

Graphical reports can be printed directly from the displayed chart. To print a report select 'Print' below the report. If this 'Print' button is not available right-click on the graph and click 'Print'. When the print menu opens, change the printing variables as required and click 'Print'.

Text reports must be exported to PDF or Microsoft Excel in order to print.

Adding a report to My Reports with the @prompt command in the query

If you select to add a report to 'My reports' with a query containing an '@prompt' command you will be asked to select whether the '@prompt' setting should always use the currently selected values or whether the saved report should prompt the user for values when running the report. Select 'Prompt for values when running the report' to retain the ability to customise the search parameters when running the report.



Exporting Reports

Reports can be exported to:

- Excel (except Gauge reports)
- PDF
- CSV (Listing reports only).

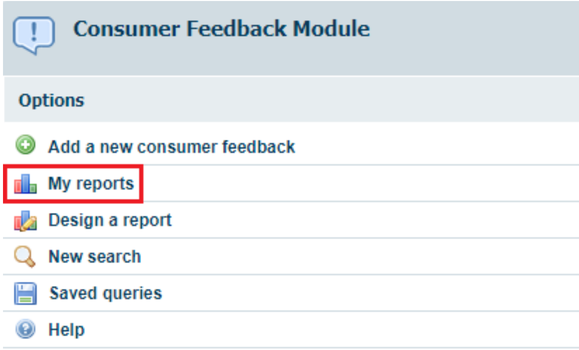
Traffic light reports cannot be exported but can be printed to PDF by right-clicking on the graph and selecting 'Print'.

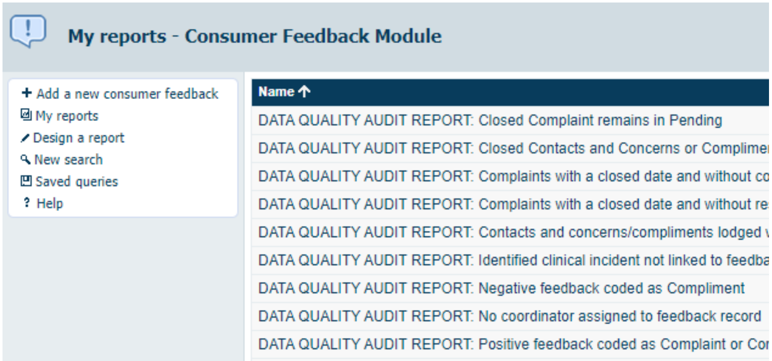
To export a report while the report is displayed on the screen select 'Export' at the bottom of the report and follow the prompts.

Exporting to Excel will produce a spreadsheet with the selected graph type and a linked table of summary data.

My Reports

The statewide reports available from the 'My reports' menu have a pre-defined query matched to a set listing report format.





Selecting one of the reports from the list will either generate a report or direct the user to the 'Design a report' page where further information can be entered, such as location or date range (see 'Design a Report' section below). The statewide reports available through 'My reports' are split into four types of reports outlined in the table below.

Report type	Intended use
Data quality audit reports	Designed to identify data accuracy errors
Feedback management reports	Designed to assist in day-to-day management of consumer feedback
Listing reports	Designed for use in performing reporting requirements
Reports with the prefix 'Pre-2021'	Designed with queries and report formats relating to the design of CFM prior to the extensive changes made at the beginning of 2021.

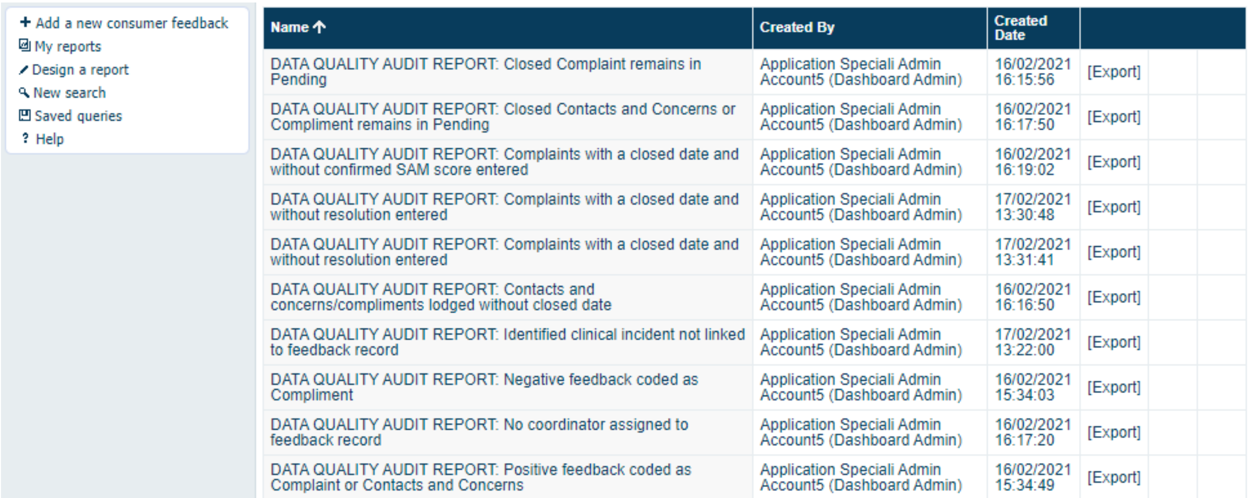
It may be necessary to use a combination of reports if reporting for a period that spans 2021 and prior years. These reports would have to be run separately.

Fields included in these statewide reports are outlined in the 'My reports' and 'My reports – Audit reports' tabs of the '**Datix CFM Statewide Queries and Reports**' spreadsheet available from the Datix CIMS & CFM HSS Hub.

Reports which have been designed and saved by a user are also listed under 'My reports'.

To run a report:

1. Select 'My reports'.



2. Click on a report in the list.

   If the query built-in to the report does not require any further user input, the report will then display and can be added to a dashboard, saved (creates a duplicate), or exported. If changes to the report type are required, the 'Report designer' screen will appear by clicking on the arrows to the left of the report title. The user then has the opportunity to change the report type or select different report settings. Click 'Update report' to generate the report.

   If the query built-in to the report does require further user input the 'Report designer' screen will appear and the user will have to opportunity to enter additional details (e.g. a date range and location) before clicking 'Update report' to generate the report.

Types of Reports

Reports are described as either being text, where data is presented in a table, or graphical, where data is presented in a visual graph.

Text Reports

There are two types of text report available in *DatixWeb*:

1. Listing Report
2. Crosstab Report

Listing Report

A **listing report** displays information from pre-specified fields within DatixWeb records. There are multiple pre-existing listing reports available for selection. It is not possible for a user to select individual fields for inclusion in a listing report. A list of the available listing reports and the columns contained in each report are outlined in the '**Datix CFM Statewide Queries and Reports**' spreadsheet available from the Datix CIMS & CFM HSS Hub.

CFM Basic Listing Report

Record count: 274

Ref	Health Service	Service	Service Division	Service Sub-Division	Place of Incident / Event	Workflow status	Type	Is the feedback negative in nature or does it express a conce...	Mental health episode of care?	Date feedback entered into the system	Date feedback received by organisation	Primary Complainant	Is the complainant the person affected by the complaint?	Replied done	Summary of events
CFM83411	Test Location1 (Health Service)	Test Location1 (Service)	Test Location1 (Service Division)	Test Location1 (Service SubDivision)	Test Location1 (Place of Incident)	Lodged	Complaint		No	11/09/2019	11/09/2019	Yes	Y	11/09/2019	Test case for HealthNext
CFM83701	Test Location1 (Health Service)	Test Location1 (Service)	Test Location1 (Service Division)	Test Location1 (Service SubDivision)	Test Location1 (Place of Incident)	Lodged	Complaint		No	01/04/2020	01/04/2020	Yes	Y	01/04/2020	Test case for HealthNext
CFM83702	Test Location1 (Health Service)	Test Location1 (Service)	Test Location1 (Service Division)	Test Location1 (Service SubDivision)	Test Location1 (Place of Incident)	Lodged	Complaint		No	01/04/2020	01/04/2020	Yes	Y	01/04/2020	Test case for HealthNext
CFM83703	Test Location1 (Health Service)	Test Location1 (Service)	Test Location1 (Service Division)	Test Location1 (Service SubDivision)	Test Location1 (Place of Incident)	Lodged	Complaint		No	01/04/2020	01/04/2020	Yes	Y	01/04/2020	Test case for HealthNext

Listing Report Parameters

Parameter	Description
Report type	Select **Listing Report**.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query from the drop-down list.
Base listing report	Select the listing report that contains the required fields.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.

The Print function will not be displayed at the bottom of a Listing report. To print a Listing report, export it to PDF or Excel.

Crosstab Report

A **crosstab report** displays a table with one field displayed in rows and another field displayed in columns. For example, as displayed in the example below, a user may want to review the issues identified in complaints that occurred during the reporting period and their SAM score.

Tier one issue by confirmed SAM score						
	SAM 1	SAM 2	SAM 3	SAM 4	No value	Total
Access	0 (0%)	4 (0.74%)	34 (6.32%)	34 (6.32%)	15 (2.79%)	87 (16.17%)
Carers Charter	0 (0%)	0 (0%)	2 (0.37%)	1 (0.19%)	0 (0%)	3 (0.56%)
Communication	1 (0.19%)	4 (0.74%)	35 (6.51%)	73 (13.57%)	21 (3.9%)	134 (24.91%)
Corporate services	0 (0%)	0 (0%)	11 (2.04%)	15 (2.79%)	6 (1.12%)	32 (5.95%)
Costs	0 (0%)	0 (0%)	3 (0.56%)	13 (2.42%)	1 (0.19%)	17 (3.16%)
Decision making	0 (0%)	0 (0%)	2 (0.37%)	6 (1.12%)	4 (0.74%)	12 (2.23%)
Grievances	0 (0%)	0 (0%)	4 (0.74%)	1 (0.19%)	1 (0.19%)	6 (1.12%)
Professional conduct	0 (0%)	0 (0%)	12 (2.23%)	12 (2.23%)	3 (0.56%)	27 (5.02%)
Quality of clinical care	4 (0.74%)	5 (0.93%)	64 (11.9%)	53 (9.85%)	39 (7.25%)	165 (30.67%)
Rights, respect and dignity	0 (0%)	3 (0.56%)	15 (2.79%)	20 (3.72%)	17 (3.16%)	55 (10.22%)
No value	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total	5 (0.93%)	16 (2.97%)	182 (33.83%)	228 (42.38%)	107 (19.89%)	538 (100%)

Add to My Dashboard | Add to My Reports | Export

Users can drill down into the summarised data to see the details of the individual records. Where the value in a crosstab report is greater than zero (>0), hover over the number until the mouse pointer turns into a hand, then click to review a list of the records.This enables easy access to both a high-level overview and detailed information from the same report. Depending how far down the report is drilled, either click 'Back one level' or 'Back to top level' at the bottom of the drilled report to return to the crosstab summary report.

Crosstab Report Parameters

Parameter	Description
Report type	Select **Crosstab Report**.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.
Rows	Select the form and field that you want to show as the vertical axis (top to bottom listing) in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Columns	Select the form and field that you want to show as the horizontal axis (left to right listing) in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Additional options	Further define how the crosstab report displays data. **Show top x items** To limit the crosstab report to display only a designated number of rows with the highest values, type the number of entries to display in the report. For example, **5** – DatixWeb will display only the 5 highest valued entries for the field you selected as the report's rows, e.g. the top 5 issue categories.

Parameter	Description
	If you leave this field blank, DatixWeb will display all rows. **Count style** Select ‘Number of records’ (default option). **Show %** Choose whether each cell of the crosstab will display the value only (the value is the count of records; default option), the percentage of the total, or both the value and percentage. **Count nulls** Tick this box to show a count of records in the current search that do not have a recorded value for one or more of the fields in the crosstab report e.g. the number of Complaints that do not have a resolution. This field is blank by default.

The Print function will not be displayed at the bottom of a Crosstab report. To print a Crosstab Report, export it to PDF or Excel.

Graphical Reports

There are seven types of graphical report available in *DatixWeb*:

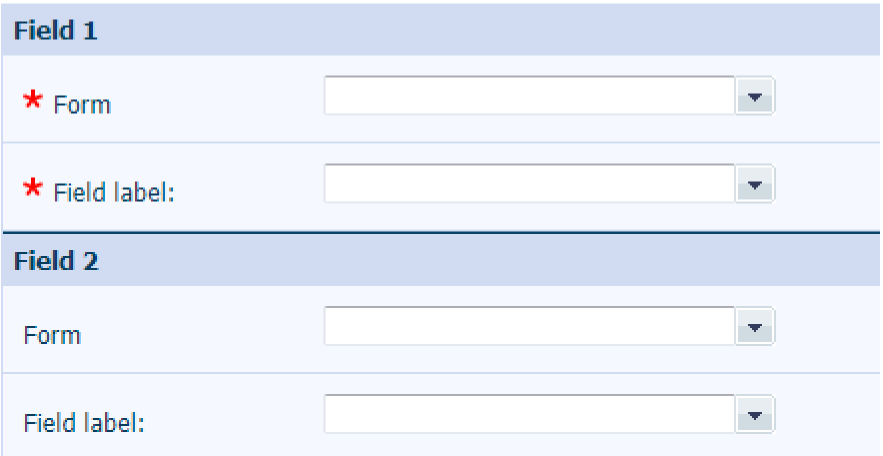
1. Bar
2. Pie
3. Line
4. Pareto
5. Traffic Lights
6. Gauge
7. Statistical Process Control Chart (SPC):

Although these reports are all available, usefulness of these reports for the Consumer Feedback Module varies.

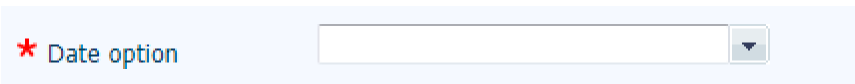
Bar Chart

A **bar chart** consists of rectangular bars with lengths that are proportional to the values that they represent. Bar charts are used for plotting data that can be placed into distinct categories, such as the confirmed SAM Scores of all complaints received. In the Consumer Feedback Module all pick-list and tick-box fields are examples of categorical data. Date fields can be grouped together in categories, for example in months or quarters, and then displayed in a bar chart. Free-text fields cannot be displayed in a bar chart.

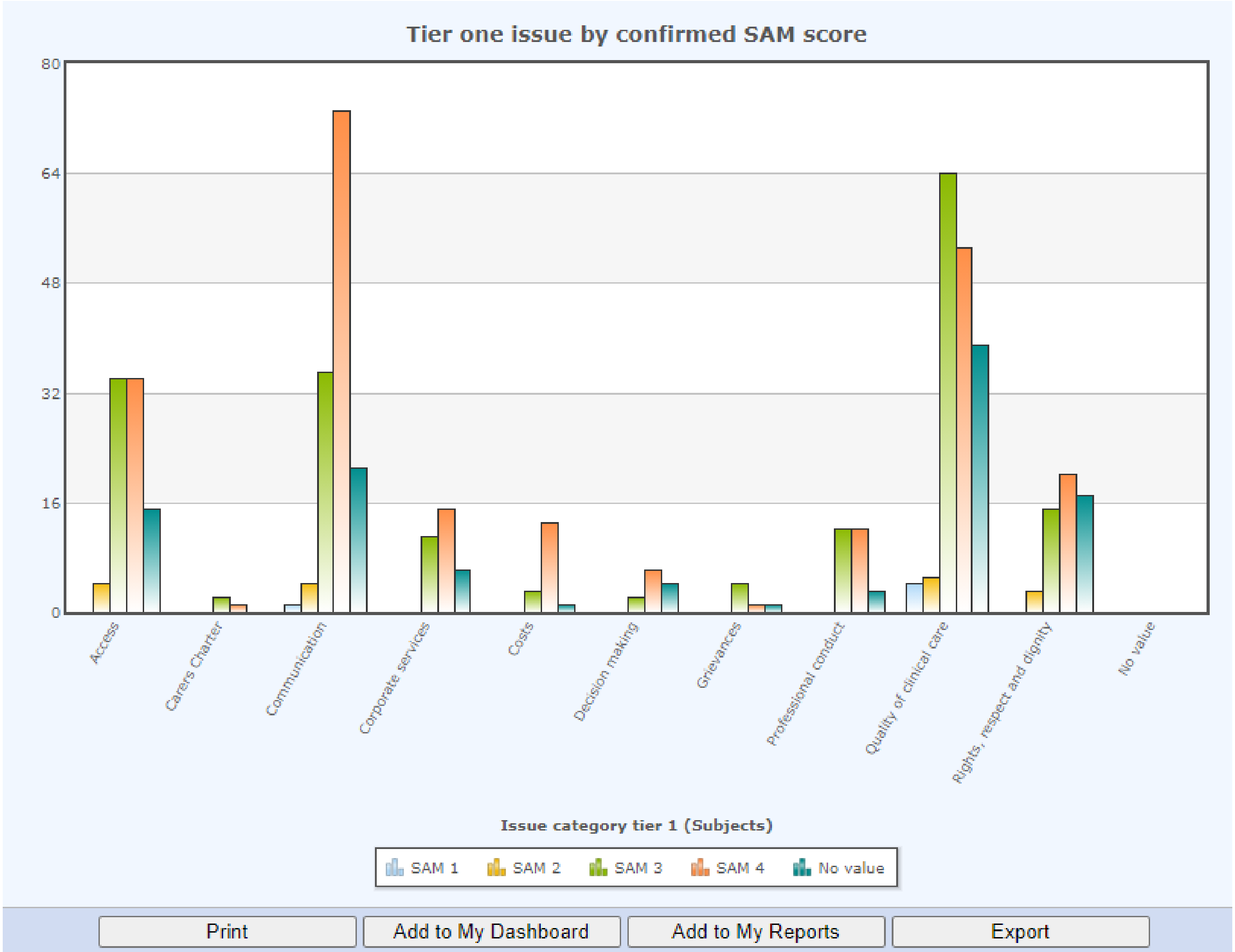
A bar chart can display data for just one field, or a second field can be selected to further breakdown the data. The field selected as 'Field 1' will be displayed along the x axis (horizontal axis). The field selected as 'Field 2' will further breakdown each of the categories in 'Field 1' with the labels of the values displayed in the legend at the bottom of the chart.



If a date field is chosen in either field label an additional 'Date option' will be generated for the user to select how dates should be categorised, e.g. Month, Quarter, Month and year.



In the bar chart below two fields have been chosen, with 'Field 1' set as 'Issue category tier 1 (Subjects)' and 'Field 2' set as 'Confirmed SAM Score'. Each bar represents the total number of complaints allocated each confirmed SAM Score across the tier one complaint issue categories.

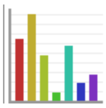
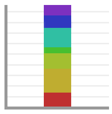
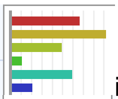
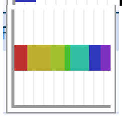


Hover over each bar to view the actual number and percentage (if selected).

To view the records represented by any section in a graphical report, hover over any section and left-click to display a list of records.

To return to the graphical report from the list of records, click 'Back' at the bottom of the list.

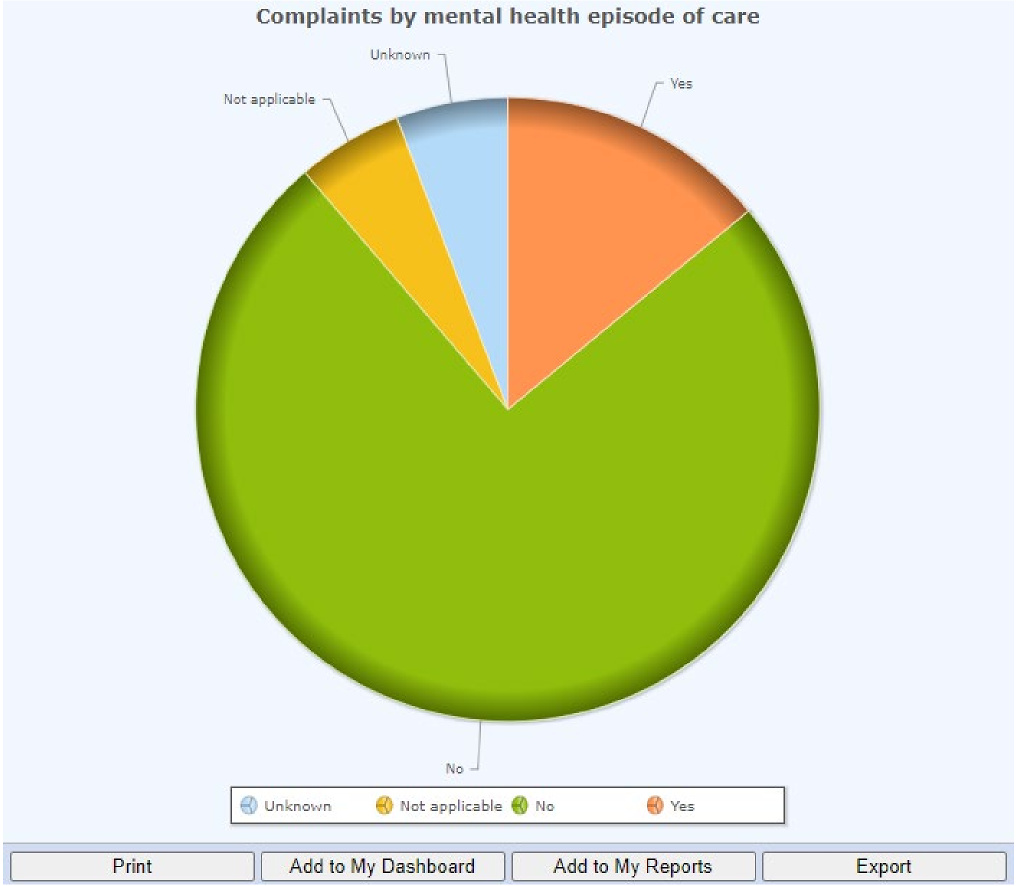
Bar Chart Parameters

Parameter	Description
Report type	Select **Bar chart**.
Chart Options ( )	Select the style and direction that you want to display in the bar chart  **Vertical** displays values in bars beside each other along the horizontal axis of the chart (this is the default). If a 'Field 2' field is selected the 'Field 2' values will be grouped together within the 'Field 1' values along the horizontal axis.  i. **Stacked vertical** displays multiple values for a field stacked on top of each other to create a cumulative total running horizontally. If a 'Field 2' field is selected the 'Field 2' values will be displayed stacked within the 'Field 1' values which will be displayed along the horizontal axis.  ii. **Horizontal** displays values in bars beside each other along the vertical axis of the chart. If a 'Field 2' field is selected the 'Field 2' values will be grouped together within the 'Field 1' values along the vertical axis.  iii. **Stacked horizontal** displays multiple values for a field stacked next to each other to create a cumulative total running vertically. If a 'Field 2' field is selected the 'Field 2' values will be displayed stacked within the 'Field 1' values which will be displayed along the vertical axis.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.
Field 1	Select the form and field that you want to show as the horizontal axis (left to right) in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Field 2	Optional: Select the form and field that you want to show as the grouping within the display of Field 1 in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Additional options	Further define how the bar chart displays data. **Show top x items** To limit the bar chart to display only a designated number of bars with the highest values, type the number of entries to display in the report. For example, **5** – DatixWeb will display only the 5 highest valued entries for the field you selected, e.g. the top 5 issue categories. If you leave this field blank, DatixWeb will display all rows. The limitation only applies to Field 1. All Field 2 values will still be displayed. **Count style** Select 'Number of records' (default option). **Show %** Choose whether each bar will display the value only (the value is the count of records; default option), the percentage of the total, or both the value and percentage. **Count nulls** Tick this box to show a count of records in the current search that do not have a recorded value for one or more of the fields in the bar chart. This field is blank by default

Pie Chart

A **pie chart** shows the proportion of each value within the selected field represented as a slice of the pie. Pie charts are used to display data that can be placed into distinct categories, such as the confirmed SAM Scores of all complaints received. Pie charts should only be used where there is a total of 100%. They are not suitable for use for fields where more than one response is possible, e.g. Resolution.

The pie chart below displays that the majority of complaints received in the reporting period have not related to a mental health episode of care.



Hover over each slice to show the actual number and percentage (if selected).

Pie Chart Parameters

Parameter	Description
Report type	Select **Pie chart**.
Chart Options ( )	Select the style that you want to use for the pie chart slices: i. **Standard** view shows the slices as a solid circle. ii. **Exploded** view shows the slices expanded and separated so that it is easy to differentiate among them. The Exploded view is useful if your chart has multiple small slices that are hard to hover over or select.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.
Field	Select the form and field that you want to show as the slices in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Date option	If you have selected a date field for the rows (slices), select the date range grouping that you want to show in the chart. If you have data that spans multiple years, you may want to select a date range grouping that includes the year. Otherwise, your data for days, weeks, months, or quarters will be combined into a single slice for that date range entry, irrespective of the year in which the events occurred. This may lead to data from several different years being combined into one slice on your pie chart. To prevent data from different years erroneously being combined into one slice, refine your initial query to include only records from the range of dates that you intend to display in the chart.
Additional options	Further define how the pie chart displays data. **Show top x items** To limit the pie chart to display only a designated number of slices with the highest values, type the number of entries to display in the report. For example, **5** – DatixWeb will display only the 5 highest valued entries for the field you selected, e.g. the top 5 issue categories. If you leave this field blank, DatixWeb will display all rows. Keep in mind that pie charts should only be used to display data where the total is 100% - therefore caution should be applied in using the 'Show top x items' functionality. **Count style** Select 'Number of records' (default option). **Show %** Choose whether each slice will display the value only (the value is the count of records; default option), the percentage of the total, or both the value and percentage. **Count nulls** Tick this box to show a count of records in the current search that do not have a recorded value for one or more of the field values in the pie chart. This field is blank by default.

Line Graph

A **line graph** displays a series of data points over time, and therefore can help to identify trends in data. A date field should be chosen as ‘Field 1’ to display the data chronologically from left to right.

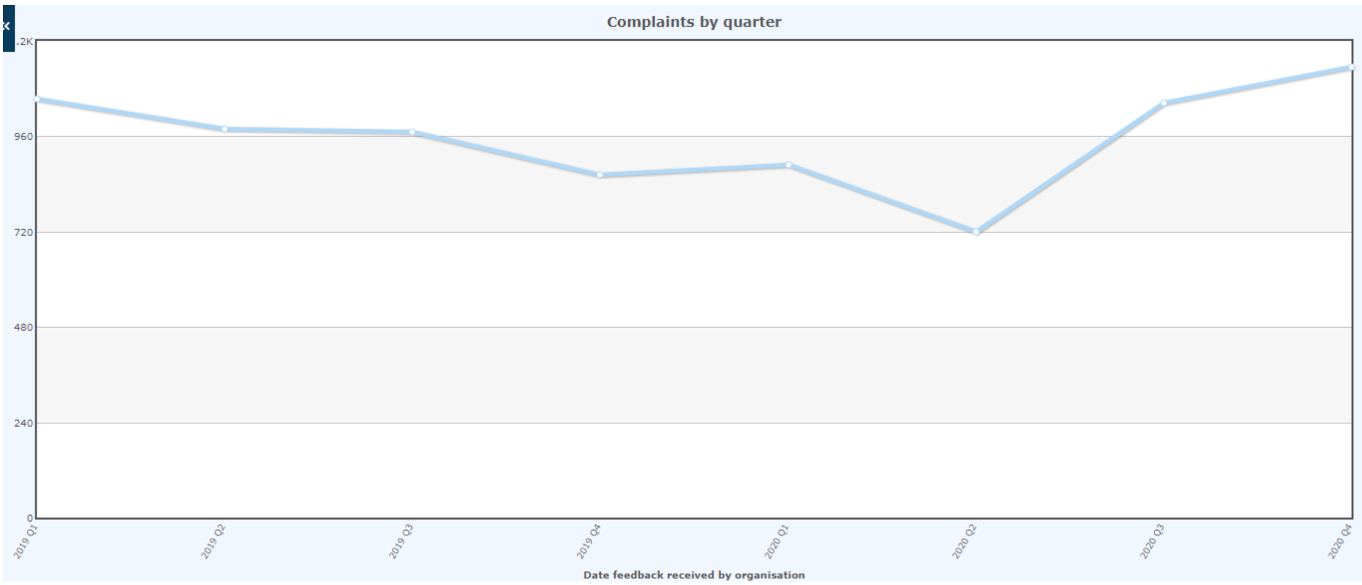
You can create a line graph with:

- **a single line** to show the changes in the data generated by the selected query over time; or
- **multiple lines** to show the changes in the data generated by the selected query over time, grouped by the field chosen as ‘Field 2’.

The line graph will contain a separate line for each value in the field. If there are no records with a particular field value the line will run along the chart’s horizontal axis, i.e. value = zero.

Single Line Graph

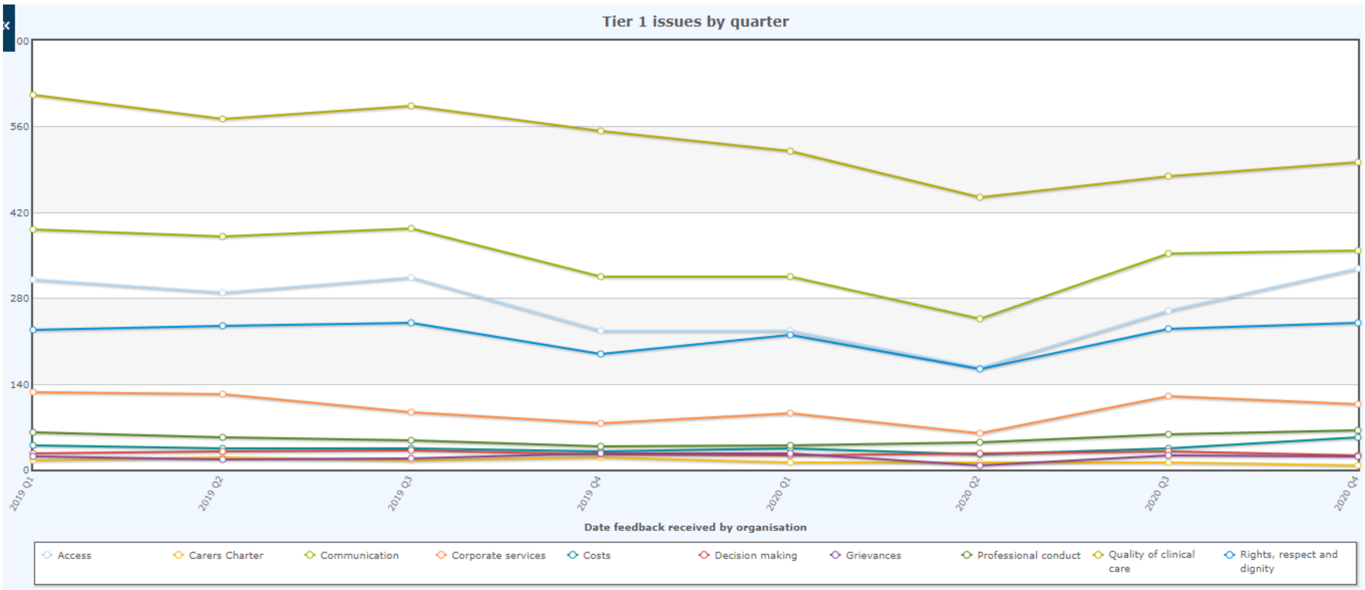
In the single line graph below, complaints received increased from 719 in Quarter 2 2020 to 1,135 in Quarter 4 2020:



> Hovering over a data point on a line will show the actual number and/or percentage, depending on selections made at Additional options (Show %).

Multi-Line Graph

In the multi-line graph below, Access issues nearly doubled from 165 in Quarter 2 2020 to 328 in Quarter 4 2020:



Line Graph Parameters

Parameter	Description
Report type	Select **Line graph**.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.
Field 1	Select the form and field that you want to show as the bottom (horizontal) axis in the graph. A date field should be selected to show trends in data across time. Select the date range grouping that you want to show in the graph. If you have data that spans multiple years, you may want to select a date range grouping that includes the year; otherwise, your data for days, weeks, months, or quarters will be combined into a single data point for that date range entry, irrespective of the year in which the events occurred. This may lead to data from several different years being combined into one data point on your graph. However this may be useful if, for example, you are wanting to compare the amount of feedback received on different days of the week.
Field 2	Select the form and field that you want to show as the other grouping (shown as multiple lines and in the bottom legend) in the graph.
Additional options	Further define how the line graph displays data. **Show top x items** To limit the line graph to display only a designated number of field values with the highest values, type the number of entries to display in the report. For example, **5** – DatixWeb will display only the date range groups with the 5 highest values, e.g. highest count of complaints.

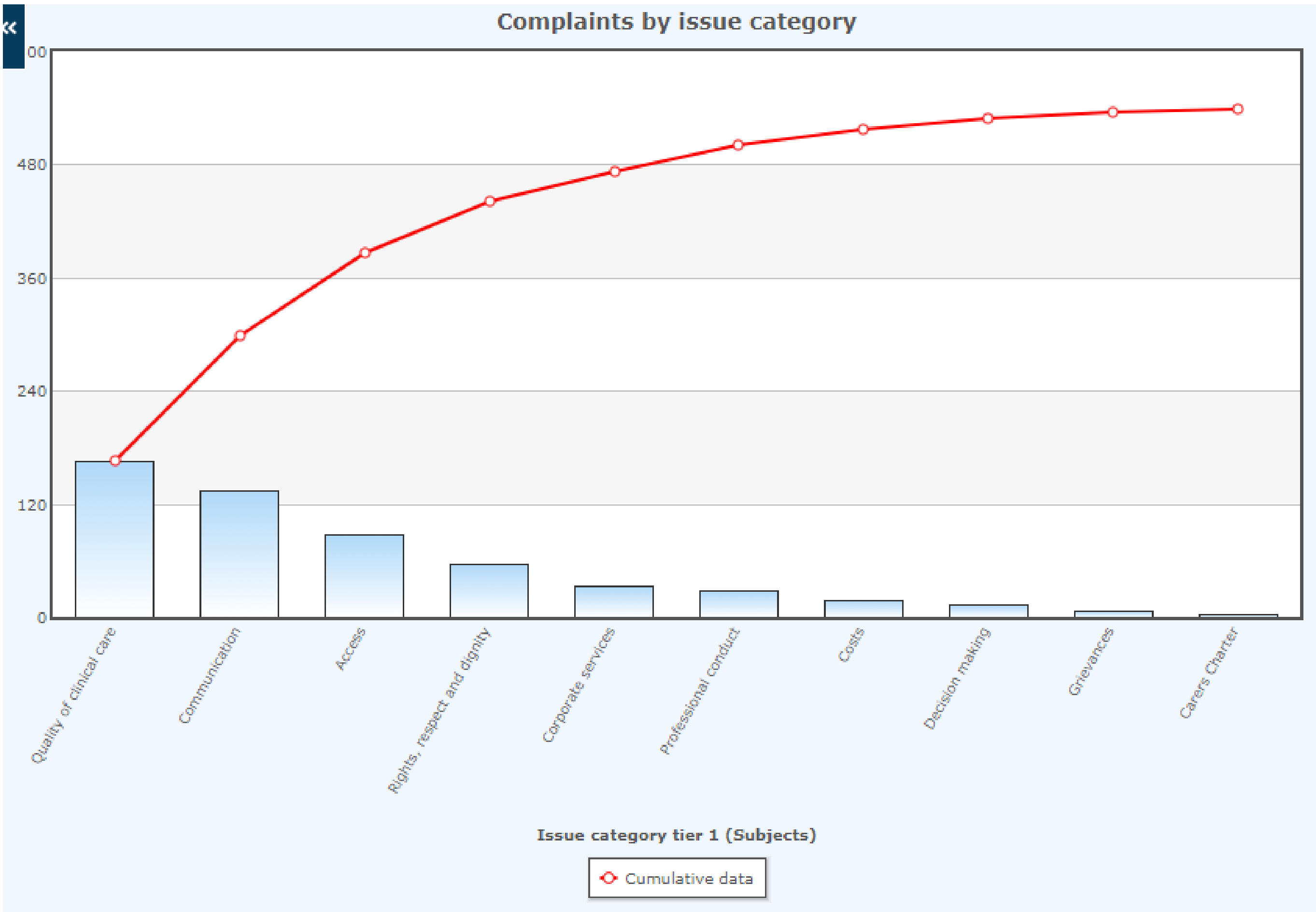
Parameter	Description
	If you leave this field blank, DatixWeb will display all rows. Note that as ‘Field 1’ is a date, limiting your chart to a specific number of items with the highest values will result in your data points being displayed out of time sequence. This will invalidate the usefulness of the line chart in identifying trends across time. If your aim is to identify trends over time then LEAVE THIS BLANK. If your aim is to identify the date range groupings with the highest number of records in your query then this functionality can be used. **Count style** Select ‘Number of records’ (default option). **Show %** Choose whether each line will display the value only (the value is the count of records; default option), the percentage of the total, or both the value and percentage. These will be displayed in the hover. **Count nulls** Tick this box to display any records in the query without a ‘Field 1’ value. They will be shown as ‘No value’ on the horizontal axis. This field is blank by default

Pareto Chart

A **Pareto chart** contains both bars and a line. Individual values are represented in descending order by bars and the cumulative total is represented by an ascending line. A Pareto chart displays data groups in a prioritised order, with the largest contributing group to the left and the smallest contributing group to the right. Note that if a date field is chosen to be displayed that dates will most likely not be displayed chronologically.

The Pareto chart can be used to highlight the most frequent values recorded in a field in the bars, while the line informs the reader which values in the field constitute each 20% increment of the total count of all values. This information can guide decisions as to where to focus resources in order to have the greatest effect on patient safety.

In the Pareto chart below the top five tier 1 issue categories constituted about 80% of all tier 1 issue categories identified during the reporting period. Quality improvement activities focused on these issues are likely to provide the greatest benefit to patients.



Hover over each bar on the chart to reveal the actual number and/or percentage, depending on selections made at Additional options (Show %).

Pareto Chart Parameters

Parameter	Description
Report type	Select **Pareto chart**.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Filters	Complete any further filters available to be applied to the query, e.g. date or location. The filters available will depend on the particular query selected.
Field	Select the form and field that you want to show as the bars in the chart. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Additional options	Further define how the pareto chart displays data. **Show top x items** To limit the pareto chart to display only a designated number of field values with the highest values, type the number of entries to display in the pareto chart. For example, **5** – DatixWeb will display only the 5 highest valued entries for the field you selected. If you leave this field blank, DatixWeb will display all rows **Count style** Select 'Number of records' (default option). **Count nulls** Tick this box to include records in the current search that do not have a recorded value for the selected field in the pareto chart. This field is blank by default

Traffic Light Chart

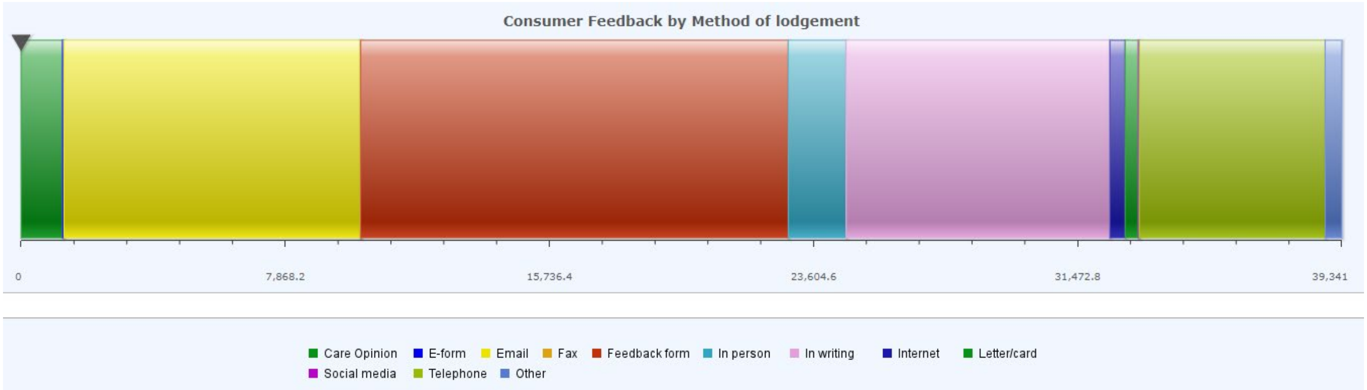
The **traffic light chart** is a single horizontal stacked-bar chart used to display the values of one field. The cumulative count of the field values is shown across the horizontal axis of the chart. A traffic light chart cannot be exported.

The traffic light chart can be used as an alternate to a pie or bar chart in the Datix CFM but only for three fields:

1. Type
2. Workflow status
3. Method of lodgement

Despite its name, a traffic light chart does not only display results in the typical red, amber and green (RAG) configuration. The colour for each value can be changed by clicking on the current assigned colour.

In the traffic lights chart below, 39,341 items of consumer feedback were lodged via 12 methods of lodgement. The most common method of lodgement was via a feedback form.



In traffic light charts, it is not possible to view the records for each value by hovering the mouse over a colour.

Traffic Lights Report Parameters

Parameter	Description
Report type	Select **Traffic lights**.
Query	Select to use either: i. the current criteria (your most recently defined search criteria); or ii. a saved query.
Traffic light	Select the form and field that you want to display. Refer to the 'Terms Used in this Guide' for clarity about these terms.
Traffic light options	List of values for the field that you selected. Click inside the colour field to define a custom colour for each value.
Additional options	Further define how the traffic light chart displays data. **Count style** Select 'Number of records' (default option).

Parameter	Description
	Show % Select ‘Value only’ (default option). **Count nulls** Tick this box to show a count of records in the current search that do not have a recorded value for one or more of the fields in the traffic light chart. This field is blank by default

Gauge Report

Gauge reports, also known as red/amber/green (RAG) reports, show whether the count of an event falls in the user-defined ‘good’ range (green by default), ‘fair’ range (amber by default), or ‘poor’ range (red by default). The user is required to define the acceptable number of events for each range.

Caution should be exercised in the use of gauge reports in consumer feedback reporting as the concept of an acceptable number of events does not apply. Consumer feedback is to be encouraged and the opportunity to learn from all consumer feedback embraced. As such an example of use of a gauge report is not included in this guide.

Statistical Process Control Chart

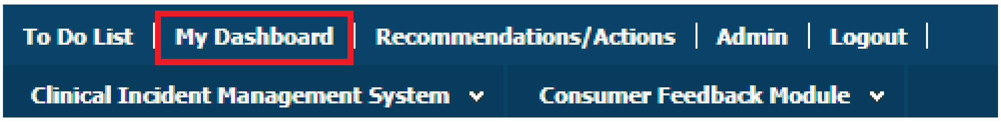
Statistical Process Control (SPC) charts monitor the *stability of a process*. They display data in a way that informs users whether the variations in a process are within control limits. SPC charts show data chronologically and help the user to identify whether variations in the data across time is either a natural or unnatural variation. The ‘Field’ selected should always be a date field.

SPC charts require some statistical understanding to construct and interpret. It is not possible to adjust the upper and lower control limits in *DatixWeb.* As such an example of use of a SPC chart is not included in this guide.

Dashboards

A dashboard displays a set of reports on one or multiple screens providing users with an overview of consumer feedback. Any number of reports can be added to dashboards.

To view your dashboards, select ‘My Dashboard’.



Users will not be able to edit a dashboard that has been assigned to them by the DatixWeb system administrator, e.g. statewide dashboards.

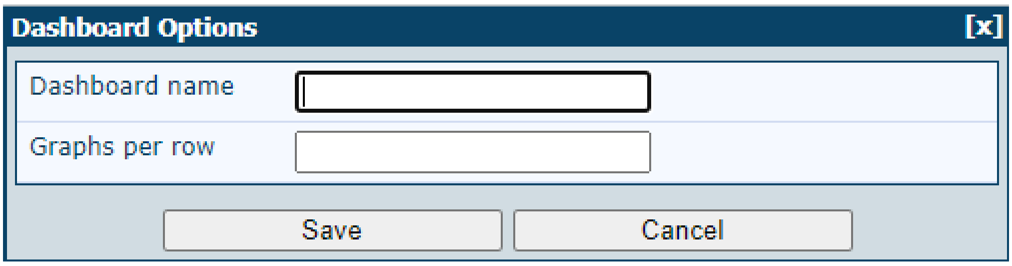
Creating a New Dashboard

To add a new dashboard:

1. Select ‘My Dashboard’ and click the **+** icon at the top of the dashboard display. The new dashboard appears to the right of the previous dashboard tabs with the title ‘Dashboard for user # [user ID#]’.

2. In the lower right-hand corner of the new dashboard, select ‘Options’.

3. Give the dashboard a suitable name that describes the reports that it will contain or the user for whom it is intended. Configure the number of graphs per row that should appear in the dashboard, considering the nature and layout of the types of reports likely to be added to the dashboard.



Deleting a Dashboard

To delete a dashboard:

1. Select ‘My Dashboard’.

2. Select the tab for the dashboard that you want to delete.

3. Click the **X** icon to the right of the dashboard name in the tab.

4. To confirm the delete of the dashboard and all the reports it contains, click ‘OK’.

When a dashboard is deleted all reports that the dashboard contained are also removed. To retain a report, move it to another dashboard before deleting the dashboard.

Managing Reports in a Dashboard

Default Dashboard

The default dashboard will display when clicking on 'My Dashboard'. To set a dashboard as the default dashboard, select 'Set as default dashboard'.

Adding Reports

Users can create their own reports and display them on their dashboard, allowing full control over the information presented.

To add a report to a dashboard:

1. Create a report.
2. Select 'Add to my dashboard'. The 'Set Report Title' window will open.
3. Select the dashboard to add the report to from the drop-down list.
4. Click Save - the system will save your report to the selected dashboard and open the dashboard where you will see the report displayed.
5. Click and drag the report to change where it is displayed on the dashboard.
6. Each time you load the dashboard, the reports are updated to reflect any updates to the report.

> You can refresh the report at any time by clicking 'Refresh' from the icon.

Moving Reports

This feature is only available if two or more user dashboards have been created.

> **WARNING!**
>
> Do not move user created reports to the Statewide Dashboard!

1. Select the dashboard that contains the report to be moved and then select the relevant report.
2. Select the icon and choose 'Move to …' from the menu. A sub-menu will appear with the names of the available dashboards.
3. Select the dashboard to move the report to.

Deleting Reports

1. Select the dashboard that contains the report for deletion and then select the relevant report.

2. Select the icon and choose 'Delete' from the menu.

3. To confirm the delete, click 'OK'.

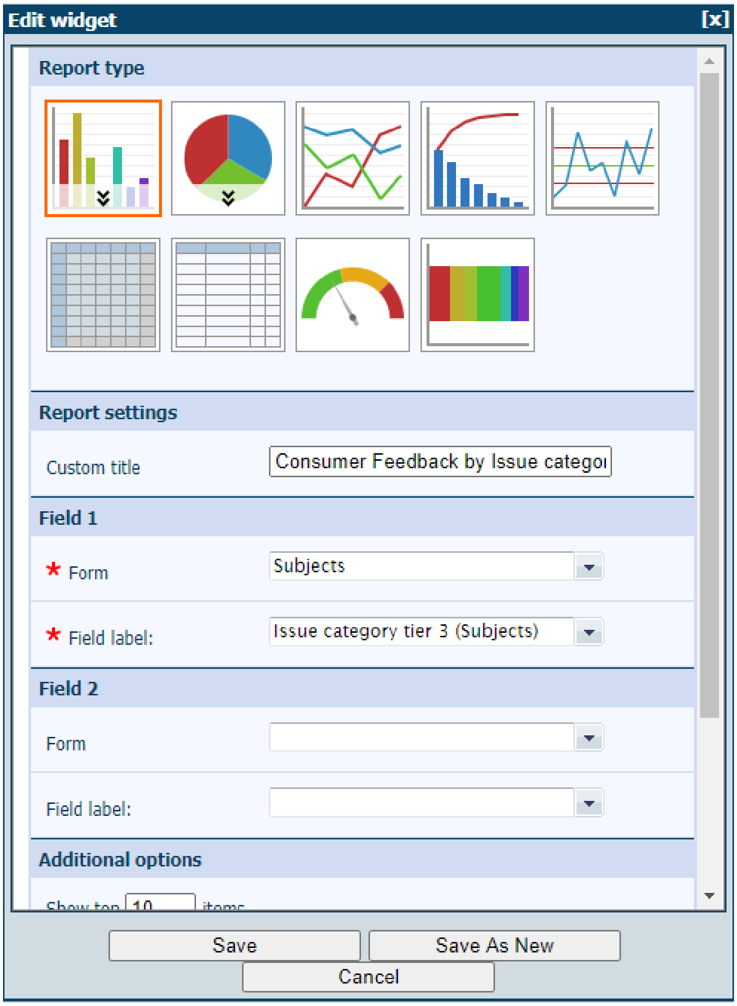
Editing Reports

1. Select the dashboard that contains the report that requires editing and then select the relevant report.

2. Select the icon and choose 'Edit' from the menu. The 'Edit widget' will open.

3. Amend the fields in the widget as necessary.

4. To save the report with the changes select 'Save'. To save the current report as a new report with the changes select 'Save as new'.



Exporting Reports

1. Select the dashboard that contains the report to be exported and then select the relevant report.

2. Select the spanner icon and choose ‘Export’ from the menu.

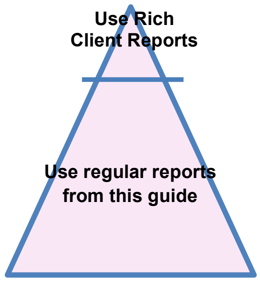
3. Select either ‘Excel’, ‘PDF’, or ‘CSV’ and click ‘Export’ - the report opens in the selected application.

Also refer to Exporting Reports.

Advanced Reporting using Datix Rich Client

Datix CFM has a module referred to as Datix Risk Management (Rich Client) which allows you to run more in-depth data analysis. Datix CFM data can be selected and exported to Excel for further detailed analysis.

The reporting requirements of the majority of users will be met by using the reports described in this guide.



A smaller number of users will require the advanced reporting capability of the Rich Client Module for more in depth analysis of the consumer feedback data. It enables the user to customise the fields to be included in a listing report.

Please contact your Safety and Quality Team to discuss your ability to request access to the Rich Client Module.

Appendix I: Search Symbols

Symbol	Description
*	**Wildcard** - particularly useful for searching within text boxes. Examples: Entering ***needle*** would return all incidents where text has been entered before or after needle, such as phlebotomy needle prick. Entering **needle***, would return records where the description begins with the word needle, such as needle stick injury.
=	**Is null** - searches for all records where a particular field is empty. Example: **=** in the Closed date field would return all records where there is no recorded closed date. The **=** symbol is also particularly useful when searching for records where data has been omitted.
==	**Is not null** - searches for all records where a particular field has a value recorded, regardless of what the value is. Example: **==** in the **Closed date** field would return all records where an incident's closed date has been recorded.
?	**Single character wildcard** - works in a similar way to the asterisk, but signifies only one unknown character. Example: **SM?TH** in the **Name** field would return records for SMITH or SMYTH, but not SMYTHE.
<	**Less than** - enables a search for values less than a specified amount, or dates before a specified date. Example: **<2/6/01** would return all records where the value in the specified date field was before 2 June 2001.
>	**Greater than** - enables a search for value greater than a specified amount, or dates after a specified date. Example: **>10/1/00** would return all records where the specified date field was after 10 January 2000.
<=	**Less than or equal to** - enables a search for a value less than or equal to a specified value or date. Example: **<=10000** would return all records where the value in the searched field was less than or equal to $10,000.
>=	**Greater than or equal to** - enables a search for a value greater than or equal to the specified value or date. Example: **>=10000** would return all records where the value in the specified field was $10,000 or more.

<table>
<tr><th>Symbol</th><th>Description</th></tr>
<tr><td>!=</td><td>Does not contain - enables the exclusion of certain codes, dates or values from a search. Example:
Service: Armadale Health Service
Treatment/investigations required: !=Referral
All records would be returned where the treatment or investigation at Armadale Health Service did not include a referral to another clinician.</td></tr>
<tr><td>|</td><td>Or - allows a search for a choice of variables. Example:
Service: Fremantle Hospital
Diagnosis: Stroke|CHD|coronary heart disease
All records would be returned where a clinical incident has occurred at Fremantle Hospital involving a patient with a diagnosis of stroke or coronary heart disease.</td></tr>
</table>

Appendix II: Date Ranges

Date Range	Description
@prompt	Used for custom date ranges. Enter start and end dates.
The parameter on the left returns any record where the date is equal to the range on the right:	
@today	Current date
@week	Current week
@lastweek	Previous week
@month	Current month
@last month	Previous month
@quarter	Current quarter
@lastquarter	Previous quarter
@year	Current year
@lastyear	Previous year
@finyear	Current financial year
@lastfinyear	Previous financial year

Appendix III: Location of fields in Report Designer

This below fields represent those commonly selected in design of reports. It is not intended to be a complete list of all fields available for selection.

Field in Datix	Report designer	
	Form	Field label
Closed date	Consumer Feedback	Closed date
Confirmed SAM Score	Consumer Feedback	Confirmed SAM Score
Coordinator	Consumer Feedback	Coordinator
Date feedback received by the organisation	Consumer Feedback	Date feedback received by organisation
Desired outcome for the person reporting the feedback	Consumer Feedback	Desired outcome for the person reporting the feedback
Did this feedback identify a clinical incident?	Consumer Feedback	Did this feedback identify a clinical incident?
Does the feedback have potential for serious patient safety, legal, political, financial, or media implications?	Consumer Feedback	Does the feedback have potential for serious patient safety, legal, political, financial, or media implications?
Does the feedback relate to any of the NSQHS Standards?	Consumer Feedback	Does the feedback relate to any of the NSQHS Standards?
Does the feedback relate to multiple sites?	Consumer Feedback	Does the feedback relate to multiple sites?
Has the feedback been received via a minister's office?	Consumer Feedback	Has the feedback been received via a minister's office?
Initial SAM Score	Consumer Feedback	Initial SAM Score
Is authorisation to release information required?	Consumer Feedback	Is authorisation to release information required?
Issue Categories: ▪ Issue Category Tier 1 ▪ Issue Category Tier 2 ▪ Issue Category Tier 3	Subjects	▪ Issue Category Tier 1 (Subjects) ▪ Issue Category Tier 2 (Subjects) ▪ Issue Category Tier 3 (Subjects)

Field in Datix	Report designer	
Issue Locations: ▪ Place of Incident/Event ▪ Service Sub-Division ▪ Service Division ▪ Service ▪ Health Service ▪ Organisation	Subjects	▪ Place of incident/Event (subjects) ▪ Service Sub-Division (subjects) ▪ Service Division (subjects) ▪ Service (subjects) ▪ Health Service (subjects) ▪ Organisation (Subjects)
Location of primary event: ▪ Place of Incident/Event ▪ Service Sub-Division ▪ Service Division ▪ Service ▪ Health Service ▪ Organisation	Consumer Feedback	▪ Place of incident/Event ▪ Service Sub-Division ▪ Service Division ▪ Service ▪ Health Service ▪ Organisation
Lodgement status after save	Consumer Feedback	Workflow status
Mental health episode of care	Consumer Feedback	Mental health episode of care
Method of lodgement	Consumer Feedback	Method of lodgement
Primary Complainant Chain: ▪ Acknowledged date due ▪ Acknowledged date done ▪ Actioned/Investigated date due ▪ Actioned/Investigated date done ▪ Replied date due ▪ Replied date done	Complainants	▪ Acknowledged due ▪ Acknowledged ▪ Actioned due ▪ Actioned done ▪ Replied due ▪ Replied done
Resolution	Consumer Feedback	Resolution
Treating specialty of person affected	Consumer Feedback	Treating specialty of person affected
Type	Consumer Feedback	Type

Note: most demographic details cannot be selected for reporting from Datix CFM. Caution should be used in reporting on the demographic fields available on the Consumer Feedback form as these fields have changed over time, with integration of these details from WebPAS occurring in late 2020.

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

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