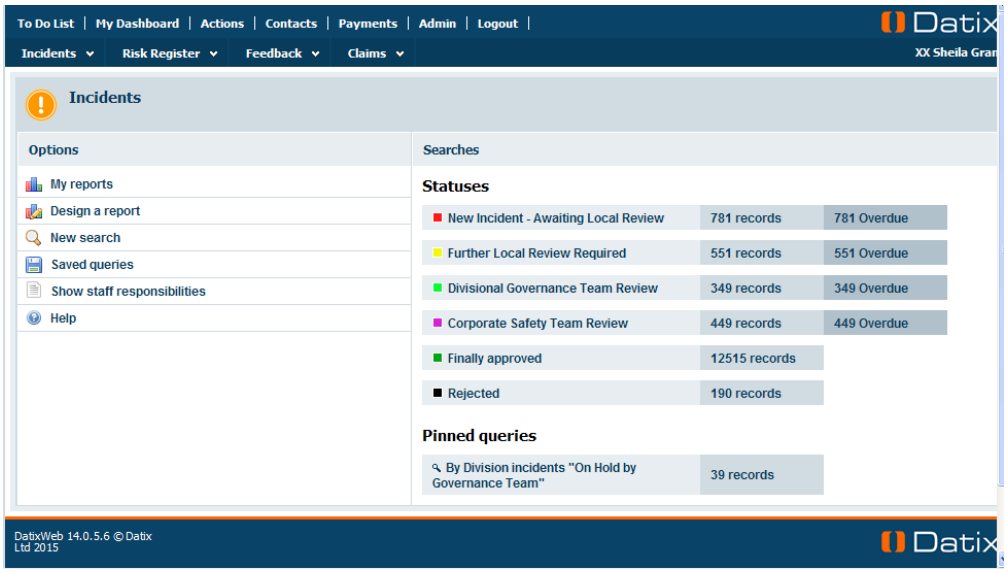
Central and North West London NHS
NHS Foundation Trust

DATIXWEB INCIDENT REPORTING SYSTEM

HOW TO SET UP REPORTS AND DASHBOARDS



Produced by The Safety Team
Stephenson House
75 Hampstead Rd
London
NW1 2PL

For queries:

Tel: 0203 214 5780
E-Mail: datixsupport-cnwl@nhs.net

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SECTION 1 - INTRODUCTION

The DatixWeb incident reporting system is used across Central and Northwest London, enabling staff to report a wide variety of any incidents that could result in harm to staff, service users or visitors or to Trust property or resources. .The system can be used by managers to produce their own statistical reports and or dashboards which can display up to date “live” incidents as they are submitted

These incidents can then be presented in a variety of excel reports and or Dashboards depending on a specific search criteria and user profile permissions, for example how many incidents have had the safeguarding questioned answered with a Yes response, the number of incidents reported whereby a patient had to be secluded etc

The production of a Datix report and or setting up a Dashboard is comprised of the following processes:

a. What do you want your report to display and in what type of format, bar chart, graph etc

b. Define your search criteria, date of incidents, category/subcategory or status of incident

c. Producing a report for a meeting or developing a Dashboard

d. Using a predesigned packaged report

e. The use of a query you have set up

Dashboards can be set up by the Safety Team access can be provided to several reviewers of a team and can be made available to Borough/speciality Managers, Borough Directors and Divisional Directors

Packaged reports are set up on request by the Safety Team and can be made available to multiple reviewers for a specific team or Borough/speciality

Queries are set up by the reviewer and can be limited for their own use or available to all but can be changed by another reviewer.

SECTION 2 – CHOOSING HOW DATA IS SELECTED FOR INCLUSION INTO A REPORT

Reports can be subsequently designed as a result of either conducting a 'New Search' or using predefined report criteria saved as 'My Reports'.

On the left hand side of the screen under the "Options" tab you will see a series of 'link' buttons as shown in Diagram 3. An explanation as to the function of these link buttons follows the diagram:

Diagram 3

My reports
Displays a list of packaged reports. Packaged reports are *reports that have been* previously defined by you and set up by the Datix System Administrator. This is useful if you intend to repeatedly run a report of events that occur regularly, for example a monthly report, by ward and severity of all slips, trips and falls. You will NOT be able to amend the search criteria for packaged reports. Further details of packaged reports and how you can request these to be designed for your team/ward/unit are given in 'Packaged Reports' or a Dashboard can be set up providing a variety of "live" self-updating graphs, tables, pie charts etc

To start you will need to perform a "New Search" *see searching for an incident*

Saved queries
You can conduct a search using saved search criteria, previously defined by you. These searches are saved as a 'Query' and are retained within the Datix system. The user can choose who has access to the queries or a dashboard report

If you require the same report on a regular basis or to be able view "live" incidents as they are reported The Safety team can set up either a packaged report (for regular reports) or a dashboard for "live" updates of reported incidents for specific criteria, status or grading. How to request a packaged report or Dashboard is given in the section Dashboards or packaged reports.

Team/Unit Managers, will have access to the data dependent on their access profile, a ward manager in K&C will be able to view their own ward but not be able to view a ward in Brent.

Matron –You will only be able to search for data from incidents reported for the teams in your Datix reviewers' profile for example Matron A at St Charles with Nile and Shannon in their profile will not be able to view incidents reported on Redwood or Kershaw at St Charles.

Service Line Manager – You will be able to view data throughout your Service

Borough/Specialist Directors and Deputies, designated PA's will be able to view all incidents reported in their respective Borough or speciality this includes PA's whereby their borough/specialist director has requested they are provided with the relevant Datix access profile.

Divisional Directors – Dashboards can be set up to provide "live" data on incidents being reported for selected categories and or subcategories, for status of incidents, SI's, safeguarding etc

- **Specified Report Creators** – Whilst not all DatixWeb users will be reviewers access can be set up by the relevant senior member of the Borough/specialist service. Please contact the Datix System Co-ordinator for further details.

SECTION 3 – NEW SEARCH

In order to run a new report using previously unused search criteria, the following sequence should be carried out to define the desired search criteria and run a report.

Log into Datix using your user name and password

Click on the “New Search” link button on the left hand side of the screen, a shorter version of the reviewers form will appear as shown minus the description of incident, immediate action taken, action taken (investigation) lessons learned etc

You can run a search by completing any of the fields displayed on the form. The more fields you complete the more refined your search results will be. Examples of search criteria are shown below:

a) **Incident Date** - Enter the required time frame in the following format: 01/01/2016:31/03/2016 a colon must be inserted between the two dates.

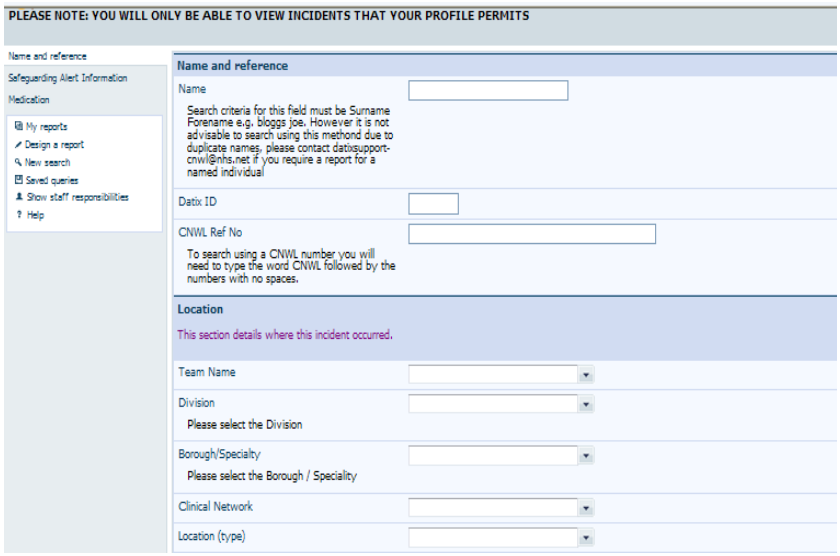
b) **Team Name -** Select your ward from the drop down menu the name will be abbreviated e.g. Kershaw Ward would just appear as KERSHK

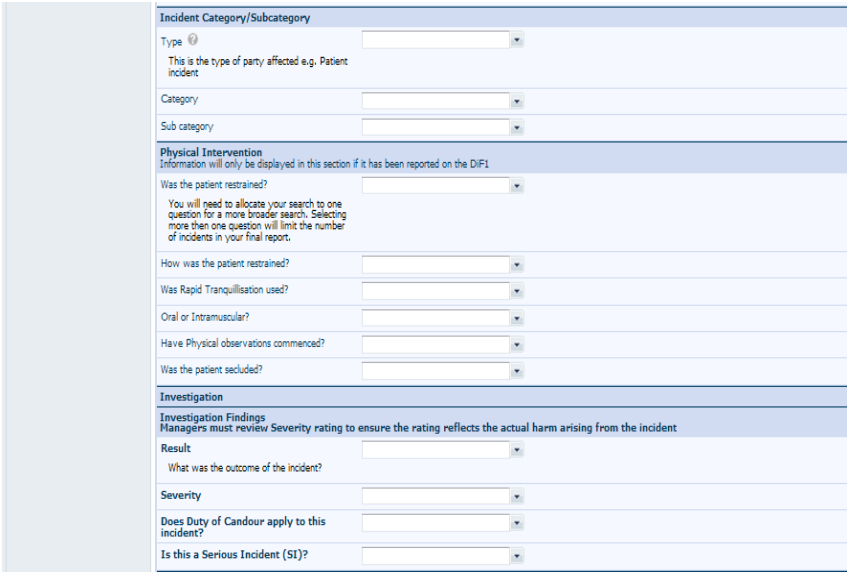
c) **Category/Subcategory -** you can select a specific Category and then select specific subcategories

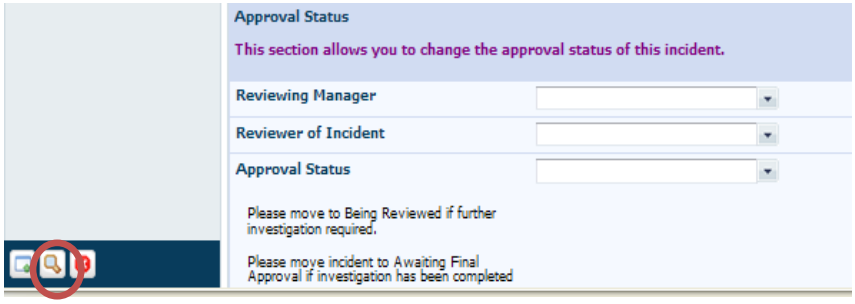
d) **4. Additional Search Criteria -** Select the drop down menu to display options for each search field. For example “Was the patient restrained”? Select Y. The more fields you select, the more specific and focused are your search results.

It is not necessary to complete the fields: Was the patient held in the Prone (face down position) Position? this question is linked to the restrained question The same being for the Oral or IM it is linked to the Rapid Tranquillisation question.

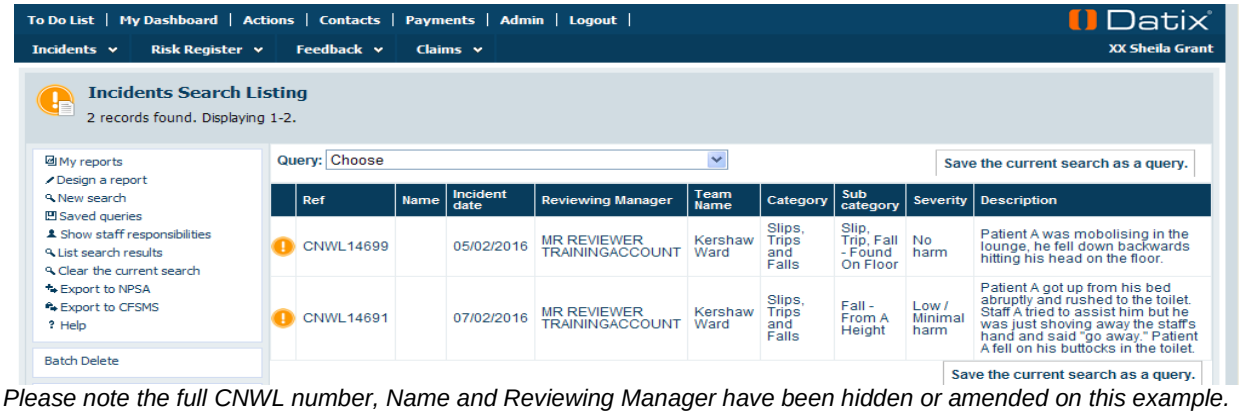
e) **5. Approval Status** - Scowl to the status section at the bottom of the form, click on the drop down menu “approval status” highlight all the statuses except for **rejected**







Below is a screen shot of the report you will be presented with.



Please note the full CNWL number, Name and Reviewing Manager have been hidden or amended on this example.

Patient or Staff Name Search

It is not recommended to search for an incident using either the patient or staff name as names are often spelt incorrectly or entered in the wrong order. If you require a report for how many incidents a named patient or staff has been involved you will need to make this request to Datixsupport-cnwl@nhs.net providing the full name, DOB, search dates (requesting "date of admission" is NOT sufficient), exactly what you would like the report to display, how many incidents of AWOL, missed medication etc.

Examples of how a name can be incorrectly entered onto Datix incident report:
John Smith
Smith John
Mr John Smith
Ms John Smith
Ms Smith John
Smith Jan
Jon Smith
Jon Smyth
John Brian Smith
Brian John Smith

Time Bands

When incidents are reported at a given time, the Datix System logs the incident into preset time-bands, these have been set up to follow shift timings:

Morning Handover time	7am to 7.30am
Morning	7.31 to 12.59
Afternoon Handover time	13.00 to 14.00
Afternoon	14.01 to 20.29
Night Handover time	20.30 to 21.30
Pre Midnight	21.31 to 23.59
After Midnight	00.00 to 06.59

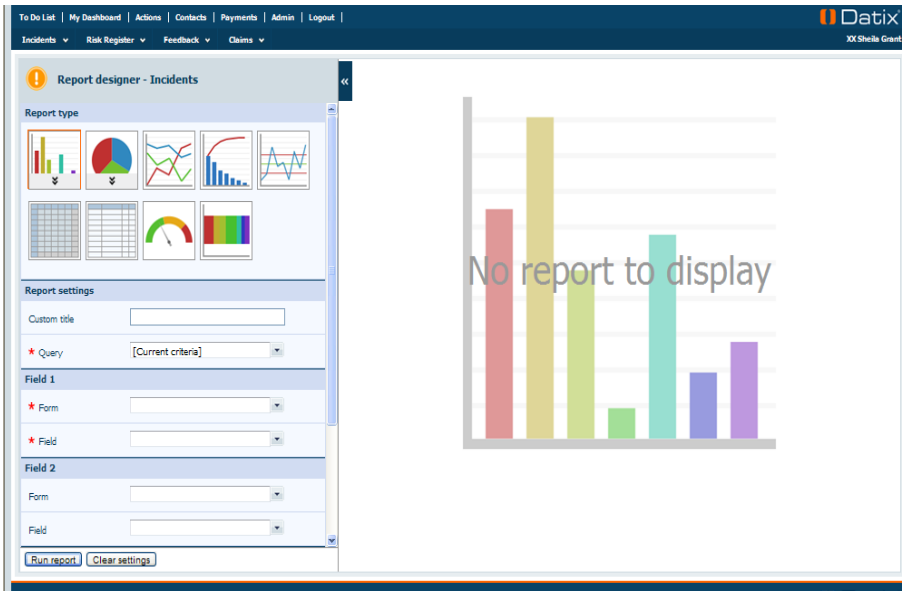
The timebands are fields on selected standard reports, these can be used to gauge if more incidents occur during certain times of the day, handover times, mornings or during the afternoon etc

SECTION 4 – DESIGN A REPORT

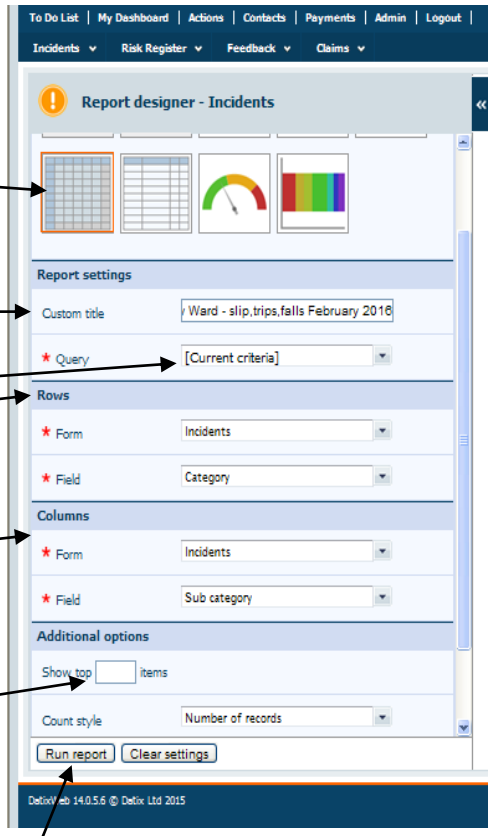
From the left hand side of the screen select Design a report.

On this screen you can select the type of report you would like to display your data.

Reading from top left
Bar Chart
Pie Chart
Line Graph
Pareto graph
SPC Chart
Crosstab
Listings
Gauge Report
Traffic Light



Report settings



Type of Report For the report displayed below select crosstab

Custom Title – add a name for your report for the search criteria used in this guide it would read Kershaw Ward – slip, trips, falls – February 2016.

Query – **DO NOT** change this as this is the search criteria entered on the search form

Rows

Form - Select from the drop down menu "Incidents"
Field – From the drop down menu select "category"

Columns

Form - Select from the drop down menu "Incidents"
Field – Select from the drop down menu "Subcategory"

Additional options
For larger search's you can refine your report further by selecting the top 5, 10, 20 etc for the search criteria selected, you will need to type the figure into the box.

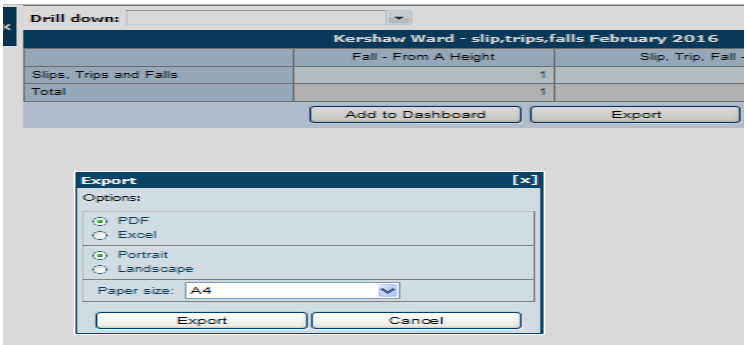
Click on **Run report**

The search criteria detailed above will display the report shown below

You can click on the number 1 displayed in the column "fall – from a height" this will take you to the incident report itself to read the details of the incident. Once you have read the report **DO NOT CLICK ON THE BACK BUTTON** scowl to the bottom on the report and click back to report, however if you make a change to the incident report you will need to save your changes and redesign the report

As the search criteria for this report used a fixed date 1st February 2016 to 29th February 2016 it is NOT advisable to add this report to a Dashboard.

Click "Export" a pop up screen will appear, select Excel this will cause excel to open on your PC, it is **NOT** advisable to use an IPAD to produce this report unless you have an on-line version of Microsoft excel or Word for PDF files installed. You can then save the report to your PC ideally as the name given to the report when created



Adding reports to a Dashboard is explained further down in this guide.

Examples of other reports that can be produced from this same search are displayed further down in this guide**.**

SECTION 5 – SAVING YOUR SEARCH AS A QUERY

Once you have run a search, you may want to save this a query to be used in again; you will need to complete the following process

a) Run your search as per instructions in Section 3 "New Search"

b) When your search results display, click on the "Save the current search as a query". This will allow you to run this search using previously set up search criteria.

A new screen will appear and you will be need to complete three pieces of information

c) Give your query a name for example "Ward A Rapid Trang", enter this information in the "Save As" box ideally you should not give this report your name or initials.

d) "Where Clause" **LEAVE ALONE DO NOT CHANGE IT.** This information defines how your report is saved and includes the behind the scenes codes used for your report.

e) Choose an option in the drop down menu "Query type" this will allow you to define who has access to run the query.

It is recommended that you make the query available to you only this is to prevent another user deleting or editing your query which would change the search criteria you have selected.

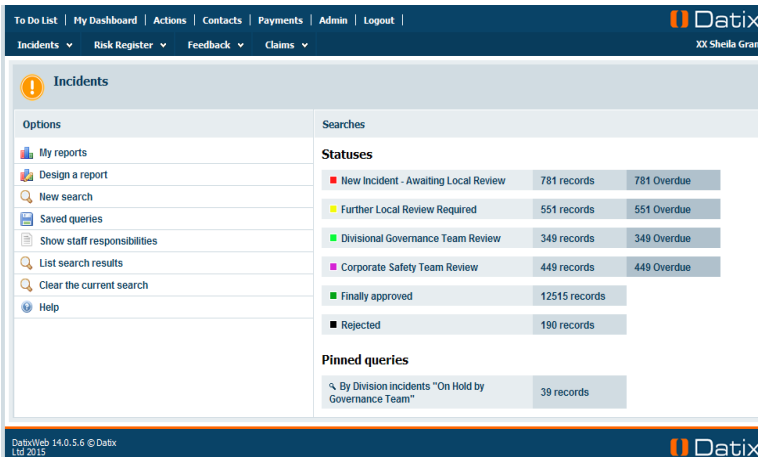
SECTION 6 – SAVED QUERIES

Having previously saved a search using your desired search criteria, you can re-visit it at a later date and run a similar report using the same information. Please note that if you do conduct a search using this facility, it will return the results within the date time range that you originally specified.

Log into Datixweb

Depending on your access to Datix ensure you are on the Incidents screen as per diagram.

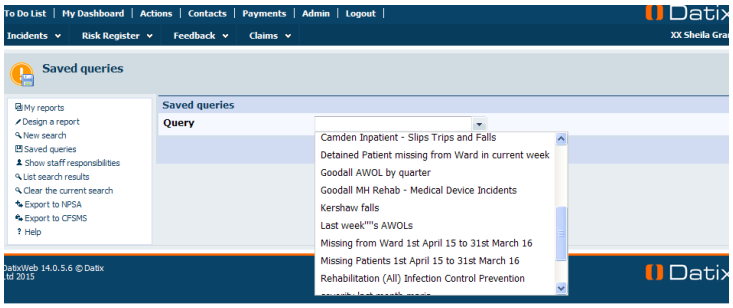
Under “Options” select “saved queries”



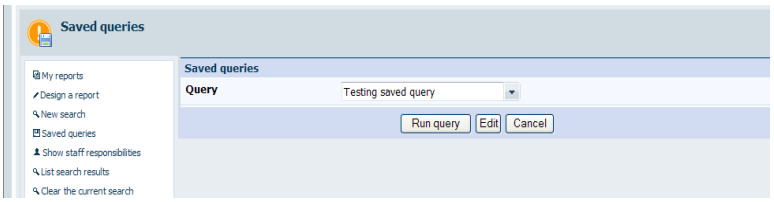
A new screen will appear as shown below

Click on the drop down arrow “Query”

Select the report you would like to reproduce click on the report the name will then appear in the Query box



Click on “Run Query”



You can also edit the report or delete the report or make it accessible to others.

Please not the only edit you will be able to do is in the “where clause” and should only be attempted if you know the background codes.

One you have your report you will be able to produce a report by following the guidance in the **Section 4 “Design a report”**

SECTION 7 – REPORT HEADINGS – STANDARD AND OPTIONAL

The Safety Team Team have set up the report field headings so that a base 'standard set' of field headings are used, whenever a 'Listing' report is run within the 'Design a Report' Section.

The standard Field headings are shown in Table 1. All the headings shown will be displayed in the report.

Table 1

Field Headings	
# Ref CNWL	This is the CNWL DatixWeb reference for the incident report. This will enable you to locate the incident if further investigation is required
# Incident Date	The date the incident occurred
# Name	Name of the person most affected by the incident. This could be either a Patient or a Staff name
Type	Staff, Patient or Visitor
# Team Name	This will display the name of the team where the incident was reported to have occurred.
# Location (type)	For an in-patient incident, the Ward or room where the patient is based. For a community based incident this could be the home of the patient or public place/street etc
Time Band	This can be used to drilled down to when more categories/subcategories are occurring (the time bands used are displayed below)
# Category	The category selected for the incident, for example 'Assault/Violence against Staff'.
# Subcategory	The subcategory selected for the incident, for example 'Assault with an object or weapon'.
Severity	The severity of the incident as given by the reporter of the incident. The box in which this information is displayed will appear Green, Yellow, Orange or Red according to security level.
Immediate action taken (when the incident was reported)	Action taken to prevent this occurring again additional action taken following an investigation e.g. referred to PICU etc.
*** Result**	This is the result of the incident completed by the reviewer, if the incident has not been reviewed this will be blank
*** Action taken (investigation)**	This is the action proposed or taken when the incident is reviewed. If the incident has not been reviewed this will be blank
*** Lessons learned**	These are the lessons learned from the incident. If the incident has not been reviewed this will be blank
*** Is this a Serious Incident (SI)**	This will display Yes or No if blank the incident has not been reviewed – you will NOT be able to view any fields completed in the SI section this will be in the separate SI listing report

When this standard report is exported into excel you can exclude columns if taking this report to a meeting as this report displays patient or staff names.

Please note the fields marked with a * will only display data if the incident has been reviewed
Field headings indicated with a # will appear on the following standardised reports

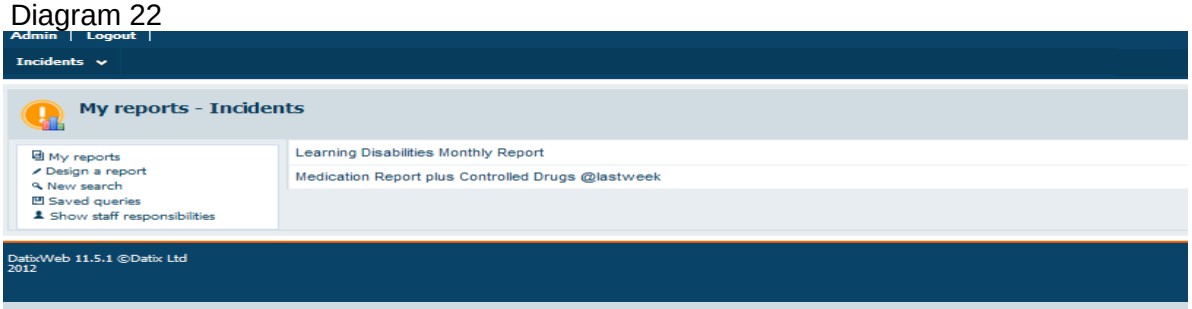
Table 2

NAME OF BASE LISTING REPORT	FIELD HEADINGS SELECTED
Standard Report Without Description and Action Taken	This report will contain the field headings marked by a # WITHOUT the following: Description of the Incident Immediate action taken at the time of the incident Result Action taken (investigation) Lessons learned Is this a Serious Incident (SI)
Physical Intervention Listings Report, etc without description & action taken fields	This report will contain the field headings marked by a # and includes the following Was the patient restrained? Was the patient held in the prone (face down) position? Was Rapid Tranquillisation used? Oral or IM? Have Physical observations commenced?
Falls Report with Description and Action Taken	This report will contain the field headings marked by a # and Includes the following Time Band: An explanation of time bands is given at the bottom of this section. Type: Did the incident involve a Patient or an Employee Age: The age of the Patient Gender: Male, Female, not stated Injuries sustained: The nature of the injury e.g. fracture Body Part: Where the injury was sustained e.g. left leg etc.
Safeguarding Incidents	Standard field headings and the following: Do you need to raise a safeguarding adult alert? Please select type/s of alleged abuse Has the Local Authority been advised? Please capture actions to be taken post alert history
Other report headings can be added but will reflect specific criteria, as requested by a Borough/Speciality or Site. These reports will be visible, but will only display results according to your profile permissions. Please contact the Datix System Co-ordinator for further help or guidance.	

SECTION 8 – PACKAGED REPORTS

By using the 'My Reports' link , you will be able to access any **Packaged Reports** that have been set up for your Ward/Unit/Service line by the Datix System Co-ordinator. In the example shown below, there are two available packaged reports. The first is a monthly report for the Learning Disabilities Service Line and the second report shows Medication Report plus Controlled Drugs @lastweek.

Diagram 22



As an example, a Learning Disabilities Monthly Listings Report has been designed with a given set of field headings, as reported on a DatixWeb Incident Report. See Table 3 for details.

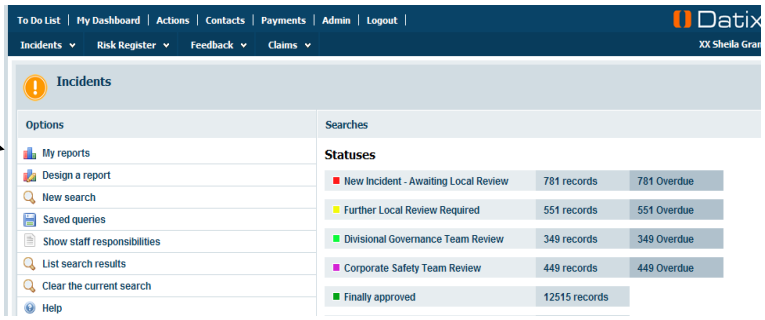
This is just an example of headings that can be included within a packaged report for a given service line. Any field that has been completed on a DatixWeb Incident Report can be provided.

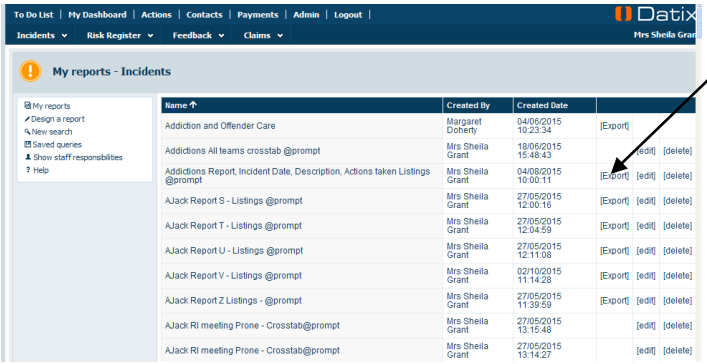
Table 3

Ref	**All reports will include the CNWL Reference Number**
Name	The person affected name
Incident date	
Time	
Category	As selected when the incident was reported
Subcategory	
Site	Name of Hospital, Unit or Team Base
Location (exact)	Ward or Team name
Type	Who was affected Staff, Patient, Trust or Public
Description	The full description of the incident
Action Taken	What action was taken at the time of the incident
Severity	As reported on the DiF1 incident reporting form
Result	What happened as a result of the incident
Grade	As graded by the reviewer
Was the patient restrained	This will either display a Yes or no response
How was the patient restrained?	The reporter can select more than one method of restraint. Standing Seated Supine (face up) Prone (face down)
Please indicate the duration of restraint	Reporters can select the total time of the restraint e.g. 0 to 5 minutes 6 to 10 minutes etc
Was Rapid Tranquilisation used?	This will either display a Yes or No response
Have Physical observations commenced	This will display either a Yes or a No response

To run a packaged report, carry out the following actions:

Click on “My reports” from the left hand side of the screen





Select the report you would like to export

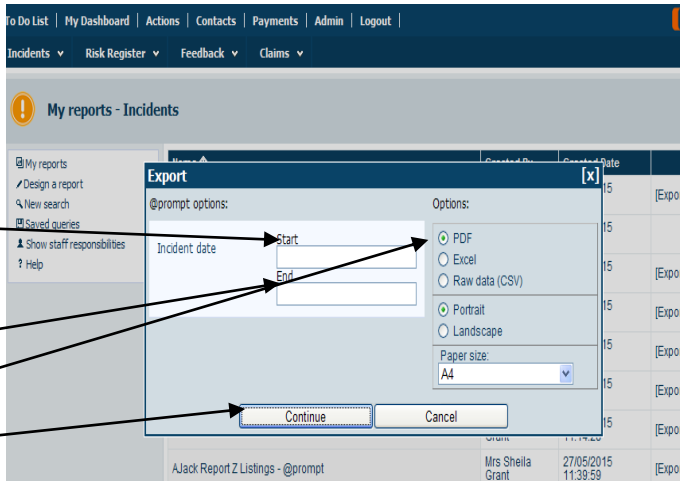
Please note you will not be able to edit or delete this report.

These are example reports

You will be prompted to insert the Start date for the report this will need to be displayed with the FULL year e.g. 2015

Insert the End date for again you will need to put the FULL year

Select either PDF or Excel



Click **Continue** by selecting excel this programme will then open up on your PC with the standard reporting associated with the packaged report set up.

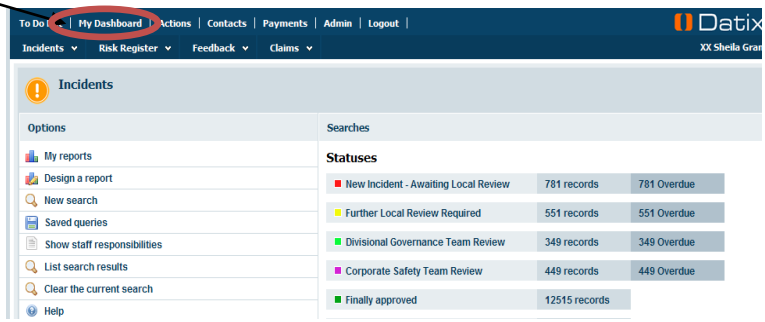
If you do not have a PDF programme on your computer you may not be able to save the file in PDF format. , It is **NOT** advisable to use an IPAD to produce this report unless you have an on-line version of Microsoft excel or Word for PDF files installed

SECTION 9 – Dashboards

The Datix reporting system can provide up to date “live” incidents figures by the use of Dashboards, these can be set up by the Safety Team or reviewers can design their own. However if you design your own Dashboards other reviewers in the team will not have access to them. Any Dashboards set up by the Safety team can provide access to multiple reviewers.

Dashboards that have been set up previously to this training, access can be provided to reviewers, borough directors, PA’s, divisional directors etc. What a person can view on a Dashboard will be restricted by their profile permissions.

If the Safety team have set up Dashboards for you, log into the Datix system and click on the Dashboard icon on the top of screen



This is just an example of Dashboards that have been set up for various staff or teams.

Setting up a Dashboard

To set up a Dashboard for you own use, you will need to search for the data you would like to display, for the purpose of this guide a self-building dashboard for Missing detained patients is going to be designed.

The search process for setting up a Dashboard is exactly the same as if you were just designing one report with the following exceptions.

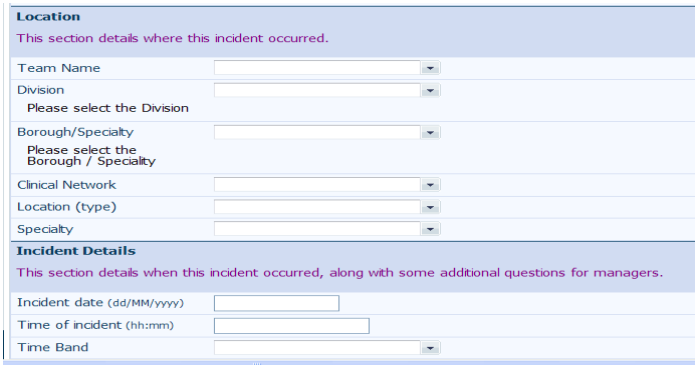
Incident Date – you can use week/month/quarter/year abbreviations as set below, these will need to be typed into the Incident date field

Symbol	Description
@week	Returns any records where the date is in the **current** week
@lastweek	Returns any records where the date is in the **previous** week
@month	Returns any records where the date is in the **current** month
@lastmonth	Returns any records where the date is in the **previous** month
@quarter	Returns any records where the date is in the **current** quarter
@lastquarter	Returns any records where the date is in the **previous** quarter
@year	Returns any records in the **current** year (Calendar year)
@lastyear	Returns any records in the **previous** year (Calendar year)
@finyear	Returns any records in the **current** financial year
@lastfinyear	Returns any records in the **previous** financial year

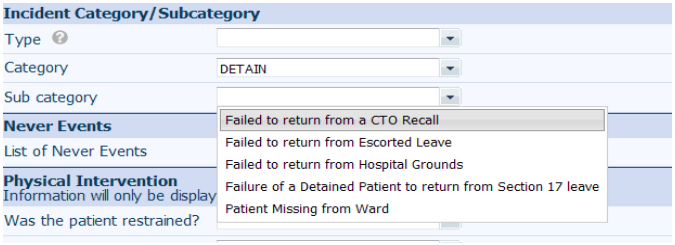
You can also input the full financial year by dates 01/04/2015:31/03/2016, this can be used if you would like the report to self-build for the current financial year, if you have used the search dates as @finyear when the new financial year starts you will need to perform a search for the previous financial year for any reports you require.

Select the team name

Insert date criteria



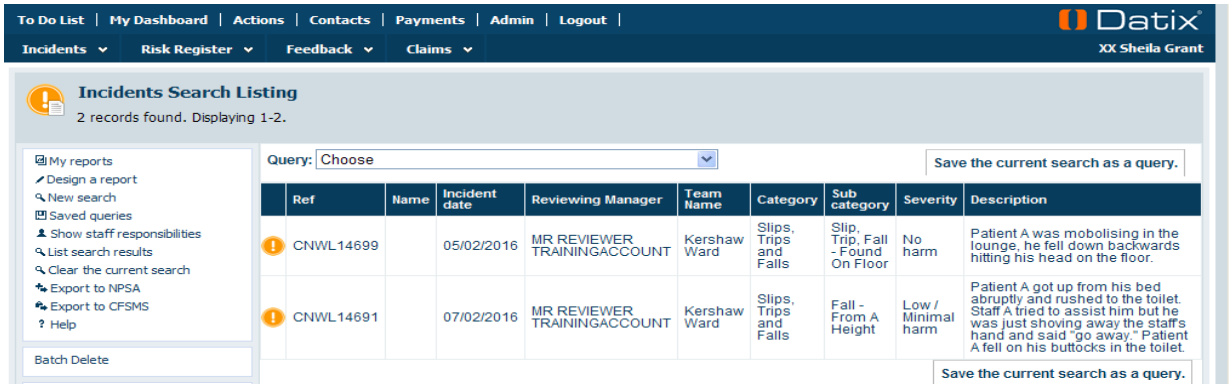
Select the category, then the subcategory. This search can be used to provide a Dashboard report for all of the Missing Detained subcategories for this you would only need to select the main category.



Scowl to the “approval status” section of the reporting form select all statuses except for **rejected**.

Click on the search icon as indicated by a spy glass

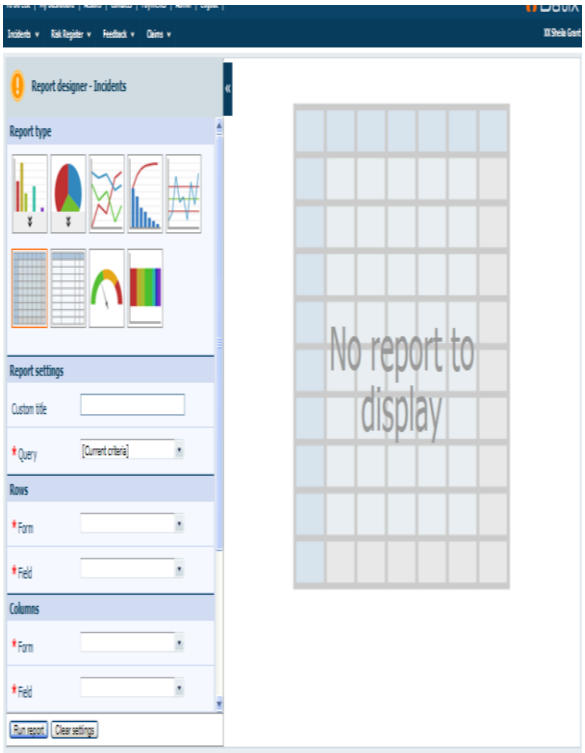
You will then be presented with an Incidents Search listing similar to the one displayed below yours will display the category and or subcategory selected.



Select Design a report from the left hand side of the screen.

Select the type of report required for this Dashboard select "crosstab"

Insert a title for your report as this is going to be a self-building report for missing detained patients for the year. The title being used is Missing Detained 1st April 15 to 31st March 16 (self-buidling).



Rows

Form - Select from the drop down menu "Incidents"
Field – From the drop down menu select "subcategory" your finished dashboard will give you a breakdown of how many incidents have been reported in each subcategory for the category selected in our search.

Columns

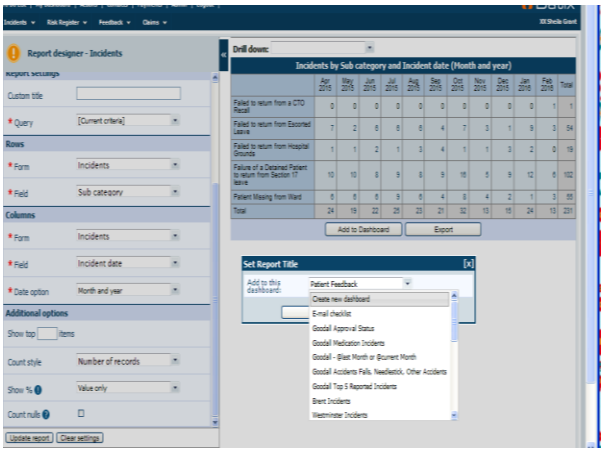
Form – Select "incidents" from the drop down menu
Field – Incident date, another box will appear whereby you will need to select a date option – select Month and year.

Click run report

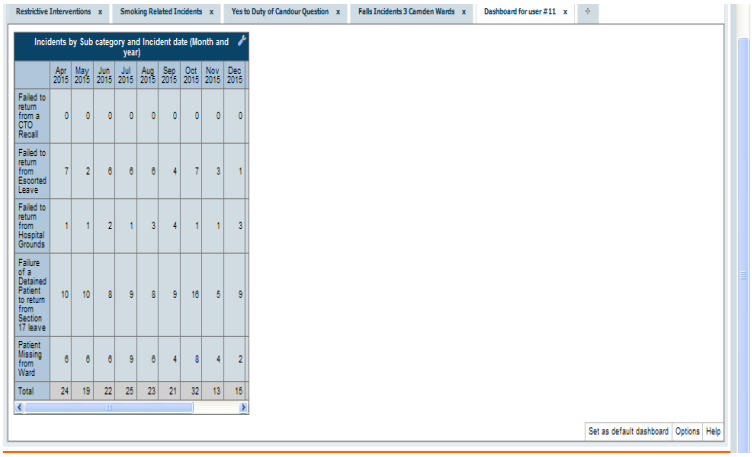
The report or similar will display, click on add to Dashboard.

You will be prompted to Add to a dashboard select Creat new dashboard, click save.

Your report will be added to a new dashboard

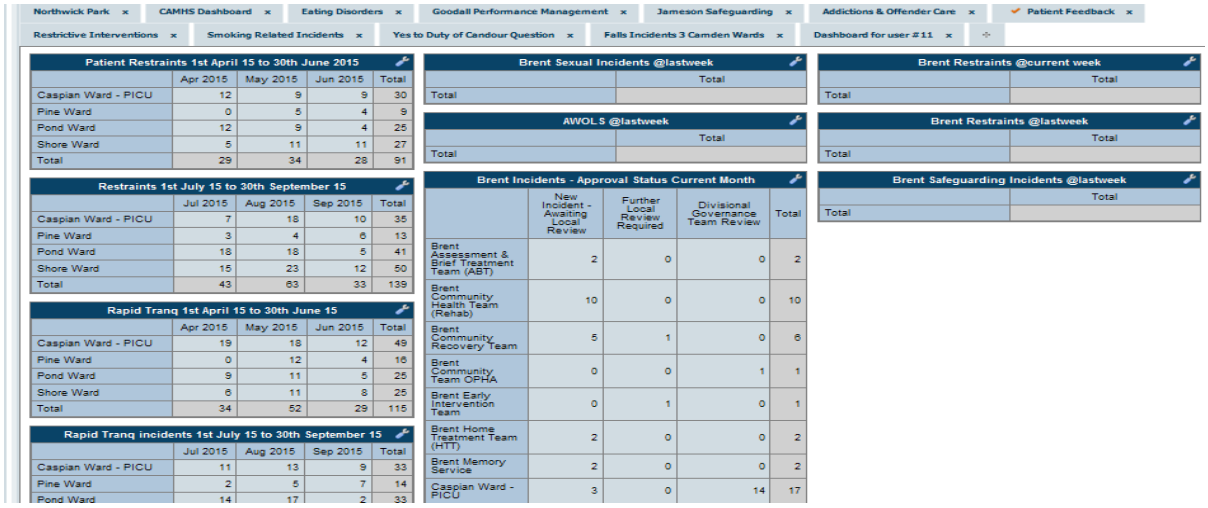


By selcting the options icon on the bottom right handside of the screen you can name your Dashboard, you will NOT be able to share this dashboard with other reviewers.



	Apr 2015	May 2015	Jun 2015	Jul 2015	Aug 2015	Sep 2015	Oct 2015	Nov 2015	Dec 2015
Failed to return from a CTO Recall	0	0	0	0	0	0	0	0	0
Failed to return from Escorted Leave	7	2	6	6	6	4	7	3	1
Failed to return from Hospital Grounds	1	1	2	1	3	4	1	1	3
Failure of a Detained Patient to return from Section 17 leave	10	10	8	9	8	9	16	5	9
Patient Missing from Ward	6	6	6	9	6	4	8	4	2
Total	24	19	22	25	23	21	32	13	15

You can add mutliply searches onto the same Dashboard



	Apr 2015	May 2015	Jun 2015	Total
Caspian Ward - PICU	12	9	9	30
Pine Ward	0	5	4	9
Pond Ward	12	9	4	25
Shore Ward	5	11	11	27
Total	29	34	28	91

	Jul 2015	Aug 2015	Sep 2015	Total
Caspian Ward - PICU	7	18	10	35
Pine Ward	3	4	6	13
Pond Ward	18	18	5	41
Shore Ward	15	23	12	50
Total	43	63	33	139

	Apr 2015	May 2015	Jun 2015	Total
Caspian Ward - PICU	19	18	12	49
Pine Ward	0	12	4	16
Pond Ward	9	11	5	25
Shore Ward	6	11	8	25
Total	34	52	29	115

	Jul 2015	Aug 2015	Sep 2015	Total
Caspian Ward - PICU	11	13	9	33
Pine Ward	2	5	7	14
Pond Ward	14	17	2	33

	Total
Total	

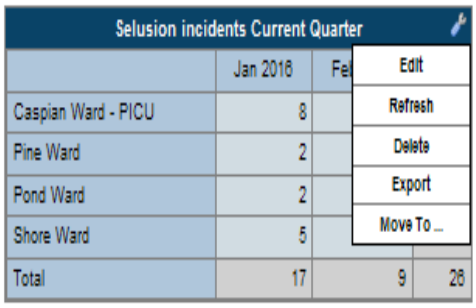
	Total
Total	

	Total
Total	

	Total
Total	

	New Incident - Awaiting Local Review	Further Local Review Required	Divisional Governance Team Review	Total
Brent Assessment & Brief Treatment Team (ABT)	2	0	0	2
Brent Community Health Team (Rehab)	10	0	0	10
Brent Community Recovery Team	5	1	0	6
Brent Community Team OPHA	0	0	1	1
Brent Early Intervention Team	0	1	0	1
Brent Home Treatment Team (HTT)	2	0	0	2
Brent Memory Service	2	0	0	2
Caspian Ward - PICU	3	0	14	17

Some of the searches displayed above have not figures as the type of incidents selected for the particluar report have had not incidents reported in the current week or previous week.



Dashboards that you have set up can be Edited, refreshed, deleted, export (to excel) or moved to another Dashboard.

When you click export it will expand to display the full report, whereby you will be able to select Export this will trigger microsoft Excel to launch on the PC you are using.

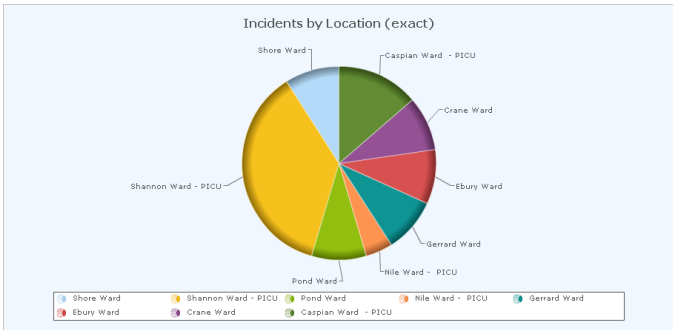
If the Dashboard has been set up for you by the Safety team you will NOT be able to Edit or Delete the dashboard

A self-building report that is set for the 1st April 16 to 31st March 17 for Missing Detained patients will not display any incidents until one is reported on to the Datix system then each date one is logged during the month of April the report will update the total figure for the month and or for the team/unit, the following monthtime the same category of incident is reported the incident will appear on the self-building report.

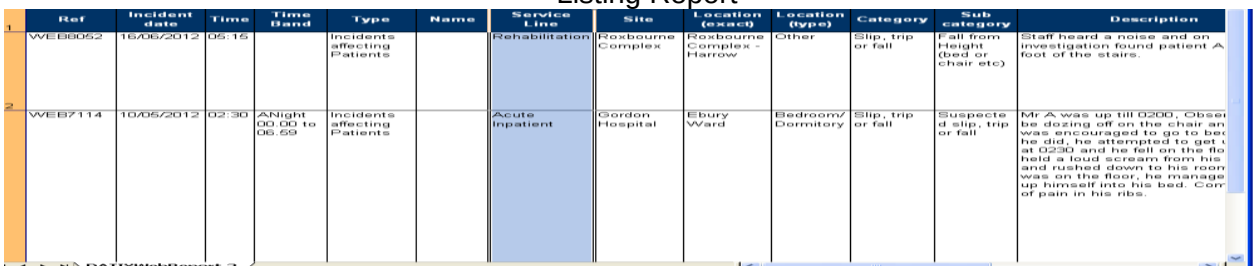
SECTION 10 – REPORT FORMATS

Data held on DatixWeb can be presented in many different formats, according to user preference or task requirements. Below are a variety of examples of the types of report format that are available for use:

Pie Chart

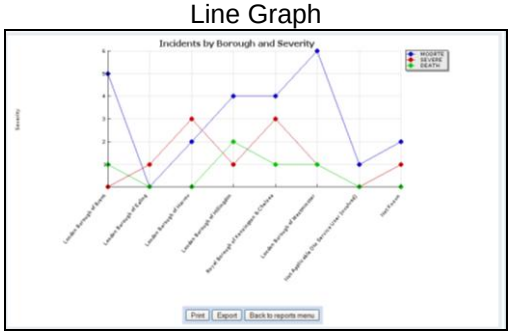


Listing Report

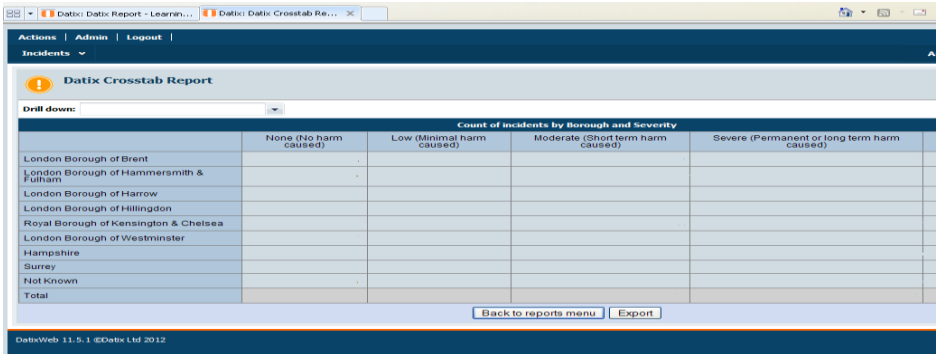


	Ref	Incident date	Time	Time Band	Type	Name	Service Line	Site	Location (exact)	Location (type)	Category	Sub category	Description
1	WEB8052	16/06/2012	05:15		Incidents affecting Patients		Rehabilitation	Roxbourne Complex	Roxbourne Complex - Harrow	Other	Slip, trip or fall	Fall from Height (bed or chair etc)	Staff heard a noise and on investigation found patient A foot of the stairs.
2	WEB7114	10/05/2012	02:30	ANight 00.00 to 08.59	Incidents affecting Patients		Acute Inpatient	Gordon Hospital	Ebury Ward	Bedroom/ Dormitory	Slip, trip or fall	Suspected slip, trip or fall	Mr A was up till 0200, Obse be dozing off on the chair an was encouraged to go to bed he did, he attempted to get at 0230 and he fell on the flo held a loud scream from his and rushed down to his room was on the floor, he manage up himself into his bed. Com of pain in his ribs.

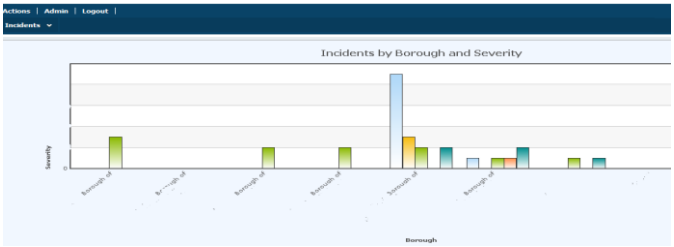
Line Graph



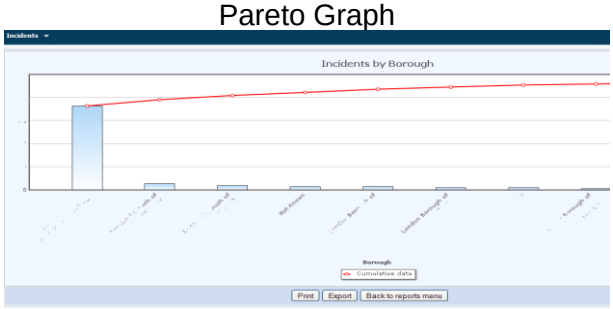
Crosstab



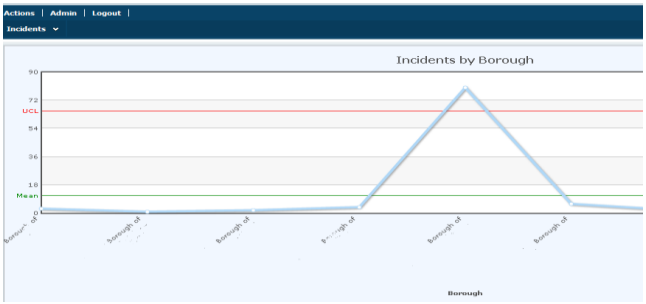
Bar Chart



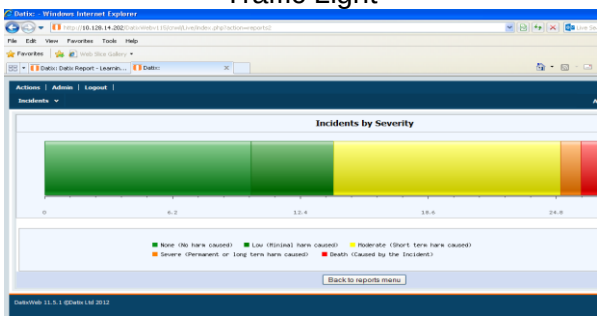
Pareto Graph



– SPC Chart



Traffic Light



Gauge