



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

WA Health Datix Clinical Incident Management System (CIMS)

Recommendations User Guide

February 2017

Version 2.0



Disclaimer

All information and content in this material is provided in good faith by the Department of Health, Western Australia, and is based on sources believed to be reliable and accurate at the time of development. Due to changing system configurations, information provided in this User Guide may not be accurate at the time of reading and is only accurate as at the date of publication.

Please address any improvement suggestions to PSSU@health.wa.gov.au



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Introduction

The WA Health Datix Clinical Incident Management System (CIMS) is an online system used by WA Health staff to report and manage clinical incidents. The WA Department of Health (DoH) Clinical Incident Management (CIM) Policy defines a clinical incident as an event or circumstance resulting from health care which could have or did lead to unintended and/or unnecessary harm to a patient/consumer. The strategic objective is to establish an integrated model of governance for the reporting of clinical incidents across public health organisations within Western Australia for patient safety and quality improvement purposes.

Purpose of this Guide

This document has been developed as a specific guide for adding, assigning, accessing and completing recommendations in Datix CIMS.

Scope

The scope of this document covers:

1. Adding, assigning, accessing and completing recommendations in Datix CIMS; and
2. Searching and creating recommendation reports

This document does not cover the requirements or principles for the development, implementation and evaluation of recommendations in response to clinical incidents. For more information please refer to the CIM Policy and Toolkit available at

http://ww2.health.wa.gov.au/Articles/A_E/Clinical-incident-management-system

Recommended Pre-reading

This guide should be used in conjunction with:

1. Datix CIMS Notifier User Guide.
2. Datix CIMS Senior Staff User Guide.
3. Datix CIMS SAC1 Management User Guide
4. Datix CIMS Third Party User Guide

Users who are not familiar with the system should refer to the above documents, available on the HSS CIMS intranet page: <http://intranet.health.wa.gov.au/hin/applications/cims.cfm>

About this Guide

1. In this guide, the web-based Datix CIMS application, available to all WA Health staff, is referred to as *DatixWeb*.
2. For clarity, the following font formatting has been used:
 - **Lavender** - functions, menu items and buttons in DatixWeb.
 - **Indigo** - hyperlinks to sections within this user guide.
 - **Teal** – web and email addresses.
3. A red box drawn on an image draws attention to particular DatixWeb functions or menu items discussed in the guide: 



WA Health Datix CIMS

Accessing WA Health Datix CIMS

Window XP Computers

To open the application on your computer screen,

click Start 

→ Health 

→ Datix CIMS icon  Datix CIMS

Window 7 Computers

To open the application use the Windows icon,

click 

→ Click All Programs, then click on Health 

→ Datix CIMS icon  Datix CIMS

DatixWeb can also be accessed by entering the following URL into the address box in your web browser e.g. Internet Explorer: <https://datixcims.hdwa.health.wa.gov.au/index.php>

Security Access

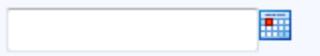
Users with Senior Staff, Head of Department, Safety Quality and Performance (SQP), Patient Safety Surveillance Unit and System Administrator profiles all have access to the 'Recommendation / Actions' module in Datix CIMS. Users with Third Party profiles can only view recommendations that have been assigned to them.

Notifiers do not have access to 'Recommendations / Actions' and therefore cannot have recommendations assigned to them.

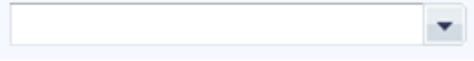
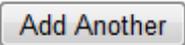
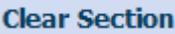
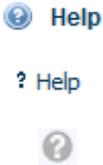
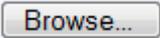
Recommendations need to be assigned to a specific user within the system and group email addresses should not be used.

General Navigation Information

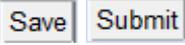
A number of features are common to many areas of the WA Health Datix CIMS.

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.



Item	Item title	Description
	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 may be general Datix help that is not specific to the WA Health system configuration.
	Round Radio Buttons	Round radio buttons allow a single selection only.
	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



Item	Item title	Description
		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 CIMS will automatically end a session if it has been inactive for 15 minutes. Once the time limit has been reached, a message will appear on the screen advising that the session will be ended unless the option to "Extend session" is selected.

Alert

Your session has been inactive for more than 15 minutes. For your security, your connection will be logged out if there is no activity after one further minute.

If you do not wish to be logged out, click 'Extend session' and your session will be extended for a further 15 minutes.

Seconds remaining: 41



Adding a New Recommendation

To add a recommendation to a clinical incident go to the 'Clinical incident investigation' screen, scroll down to the 'Recommendations' listing and click on 'Create a new action'.

Note: Before you add a new recommendation, take note of the Severity Assessment Code (Confirmed) rating in the 'Clinical incident investigation' page. You will need to enter this manually into the new Recommendation.

Recommendations	
No actions	
Create a new action	

Note: Be careful not to click on 'Add a new action chain' in the 'Action chains' section.

The following screen will then display:

Reference	
Module	
Linked record ID	219701
Recommendation/Action ID	
Recommendation/Action Details	
<p>★ Severity Assessment Code (Confirmed)</p> <p>This SAC rating must match the SAC rating (confirmed) as per the incident investigation</p>	<input type="text"/>
<p>Causation Statement Summary</p> <p>Summarise the cause of the incident. A cause is a deficiency, which if removed would probably have prevented or reduced the harm.</p> <p>See CIMS Toolkit page 33 for examples of causation summaries.</p>	<div style="border: 1px solid #ccc; height: 60px; vertical-align: top;"></div>
<p>★ Contributing factors</p> <p>These are the factor/s related to THIS recommendation that contributed to the incident as identified by the incident investigation.</p>	<div style="border: 1px solid #ccc; height: 40px; vertical-align: top;"></div>
<p>★ Recommendation title</p> <p>This is a brief description of the aim of the recommendation.</p>	<input type="text"/>
<p>★ Recommendation detail</p> <p>Describe in detail what is planned. The recommendation should be SMART - Specific, Measurable, Accountable, Realistic, Time related.</p> <p>See CIMS Toolkit page16 for an explanation of SMART recommendations.</p>	<div style="border: 1px solid #ccc; height: 60px; vertical-align: top;"></div>
<p>★ Recommendation type</p> <p>Select from the list the most appropriate description of your recommendation.</p> <p>See CIMS Toolkit page 17 for examples of types of recommendations.</p>	<input type="text"/>



What will be measured / what will your outcome be? See CIMS Toolkit page 15-20 for examples of outcome measures and evaluation methodologies.	<input type="text"/>	abc
How will this be measured?	<input type="text"/>	abc
Priority	<input type="text"/>	
Start date (dd/MM/yyyy)	13/02/2017 <input type="text"/>	
* Assigned To The recommendation should be assigned to the person with the authority to implement the recommendation.	<input type="text"/>	
Implementation Details		
Implementation due date Maximum total of 6 months to implement and evaluate recommendations. See CIM Policy for further information.	<input type="text"/>	
Implementation complete date	<input type="text"/>	
Implementation Evidence Enter a summary of the actions taken to implement the recommendation (e.g. checklist updated, new equipment purchased). Additional evidence can be attached to the recommendation as a document.	<input type="text"/>	abc
Evaluation Details		
Due date (dd/MM/yyyy) Maximum total of 6 months to implement and evaluate recommendations. See CIM Policy for further information.	<input type="text"/>	
Complete date (dd/MM/yyyy)	<input type="text"/>	
Evaluation Evidence Enter a summary of the evaluation of the effectiveness of the recommendation (e.g. summary of audit results). Additional evidence can be attached to the recommendation as a document.	<input type="text"/>	abc
Executive concur with the evaluation of this recommendation?	<input type="text"/>	
Senior Staff discussed recommendations and actions with the notifier?	<input type="text"/>	
Is further quality improvement activity required? Please also refer to your local quality improvement system.	<input type="text"/>	
Additional comments	<input type="text"/>	abc
<input type="button" value="Submit action"/> <input type="button" value="Cancel"/>		

Note: Not all of the fields on this screen can or should be completed at the time a new recommendation is created.



Fields completed at creation of a new recommendation

In the Reference section, the screen will display the:

- Module (whether relating to CIMS or CFM)
- Linked record ID (incident record relating to the recommendation)
- Recommendation/Action ID.

These will display once the Recommendation has been saved.

Note: All fields on the recommendation form marked with * must be completed before you are able to save a new recommendation.

Severity Assessment Code *

The Severity Assessment Code (SAC) (Confirmed) selected here must match the SAC (Confirmed) in the corresponding incident record.

* Severity Assessment Code (Confirmed)

This SAC rating must match the SAC rating (confirmed) as per the incident investigation

SAC 1
SAC 2
SAC 3

If you are unsure of the correct SAC (Confirmed), click 'Cancel' at the bottom of the recommendation page and navigate back to the 'Clinical incident investigation' page in the incident record to confirm. (Note the above step of 'Add a new action' will have to be repeated).

Causation Statement Summary

A causation statement summarises a finding of an investigation and gives reason/understanding to the corrective action to improve patient safety. This may be sourced from the relevant RCA/Clinical incident investigation report.

Format a causation statement in three parts - cause/effect/event – with a focus on the system vulnerability rather than individual performance. Something (Cause) leads to something (Effect) which increases the likelihood that the adverse Event will occur.

The statement must meet the Five Rules of Causation.

Five Rules of Causation (See the CIM Toolkit 2016 available from)

http://ww2.health.wa.gov.au/Articles/A_E/Clinical-incident-management-system

1. Clearly show the cause and effect relationship.
2. Use specific and accurate descriptors for what occurred, rather than negative and vague words.
3. Human errors must have a preceding cause.
4. Violations of procedure are not root causes, but must have a preceding cause.
5. Failure to act is only causal when there is a pre-existing duty to act.



Contributing factors *

The investigation into the clinical incident to which this recommendation relates will have identified a number of contributing factors and these will be entered in the 'Clinical incident investigation' page of the incident record. Of those identified contributing factors, this recommendation will address one or more. Select the contributing factor(s) that this recommendation addresses here – multiple contributing factors can be selected.

* Contributing factors

These are the factor/s related to THIS recommendation that contributed to the incident as identified by the incident investigation.

- Communication
- Knowledge/Skills/Competence
- Work Environment/Scheduling
- Patient Factors
- Equipment/Information Systems/Applications
- Policies/Procedures/Guidelines
- Safety Mechanisms
- Other

For example the clinical incident investigation may have revealed that there were Communication, Work Environment/Scheduling and Policies/Procedures/Guidelines factors that contributed to the incident. There may then be four recommendations developed in the clinical incident to address all these contributing factors, but this particular recommendation may only address Communication and Policies/Procedures/Guidelines contributing factors. In this situation, only Communication and Policies/Procedures/Guidelines would be selected here.

Recommendation title *

The recommendation title is a brief description of the recommendation. It allows users to quickly identify recommendations on their 'To-Do List' and in reports.

Recommendation detail *

Sufficient detail about the recommendation should be entered here so that someone can understand and implement the recommendation. Recommendations should directly address the root causes and/or contributing factors identified via the investigation process and be **SMART**: See CIMS Toolkit page 16 for an explanation of SMART Recommendations

Specific: The recommendation targets a specific area for improvement.

Measureable: Provide some indication of how progress/success will be determined.

Accountable: State who will be responsible for implementing and evaluating this recommendation.

Realistic: Recommendations needs to be realistic to ensure that the outcome goal can be achieved.

Time related: It is imperative to state a deadline in which the goal will be achieved.



Recommendation type *

Select the recommendation type that best describes the recommendation as described in the 'Recommendation detail'.

<p>* Recommendation type</p> <p>Select from the list the most appropriate description of your recommendation.</p> <p>See CIMS Toolkit page 17 for examples of types of recommendations.</p>	<ul style="list-style-type: none"> Architectural/physical plant changes Checklist/cognitive aids Double checks Education using simulation-based training, with periodic refresher sessions/observations Eliminate look and sound-alikes Eliminate/reduce distractions Engineering control (forcing function) Increase in staffing/decrease in workload New devices with usability testing 	<ul style="list-style-type: none"> New procedure/memorandum/policy Recommendation written in error Redundancy / back up Simplify process Software enhancements, modifications Standardized communication tools Tangible involvement by leadership Training Warnings
--	--	--

Once the recommendation type has been selected the corresponding strength of the recommendation type will be revealed. Recommendation types are described as Stronger, Intermediate or Weaker. See the CIMS Toolkit for more information.

<p>* Recommendation strength has been assessed as stronger</p>	<p>Stronger</p>
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These three categories reflect the likelihood that the planned actions are going to be successful at effecting a change in order to prevent the incident occurring again.

Note: The recommendation type 'Recommendation written in error' is not intended to be selected as a recommendation type at the creation of a recommendation, and is included in this list to enable recommendations that have already been saved in error to be made "inactive".

What will be measured/what will your outcome be?

Once the above recommendation has been implemented, what are you hoping to have changed? The outcome should go further than implementation itself. For example, if the recommendation is to update a surgical safety checklist, the outcome to be measured should be not only that the form is updated, but that it is subsequently used in 100% of surgical procedures.

How will this be measured?

How will you know that what you are hoping to have changed has occurred? What will your measurement method be? In the above example of an updated surgical safety checklist being used in 100% of surgical procedures, an audit of records to determine compliance with documentation requirements would provide a measure of how often the new checklist is being completed.

Priority

Priority can be set as high, medium or low. Refer to your local Safety & Quality team for local business rules on the use of this field as it is not mandatory.



Start date

This field is auto-populated with the date that the recommendation is entered into the system. If the recommendation started on a different date this field should be updated.

Assigned To *

The recommendation should be assigned to a staff member with the authority to implement the recommendation. The assigned user must have an appropriate user profile (i.e. Senior Staff, Head of Department, SQP or Third Party) as recommendations cannot be assigned to users with notifier status or to group emails. An email will automatically be sent to notify the assigned person of the recommendation once it has been submitted.

If the user requires access to the clinical incident record, and their profile does not already provide access, this will have to be provided via Third Party access. Refer to the Datix CIMS Third Party User Guide available from http://ww2.health.wa.gov.au/Articles/A_E/Clinical-incident-management-system. Be aware that access to clinical incident records may be further restricted for some profiles once an incident record is closed.

Implementation due date (Implementation Details section)

This is the date that implementation of the recommendation is due. This may be completed at the time the recommendation is created or at a later date.

Due date (Evaluation Details section)

This is the date that evaluation of the effectiveness of the recommendation is due. This may be completed at the time the recommendation is created or at a later date.

Note: As per the WA Health CIM Policy 2015, clinical incident recommendations need to be both implemented and evaluated within six months of the date on which the investigation is completed.

Saving the recommendation

Once the above fields are completed, click 'Submit action' to save the recommendation.

The recommendation will now be able to be accessed from the relevant clinical incident record or the recommendations module. See [Accessing Recommendations](#).



Fields completed at completion of implementation of a recommendation

Implementation Details

Implementation due date

Maximum total of 6 months to implement and evaluate recommendations.
See CIM Policy for further information.

Implementation complete date

Implementation Evidence

Enter a summary of the actions taken to implement the recommendation (e.g. checklist updated, new equipment purchased). Additional evidence can be attached to the recommendation as a document.

Implementation complete date

This is the date that the recommendation has been fully implemented. For example, if a recommendation was to obtain new equipment, the date that implementation is complete would be the date the equipment is fully installed and functioning within normal operations.

Saving the recommendation with this date completed will also populate the 'Implementation complete date' in the 'Recommendations' listing in the incident record.

Recommendations										
Module	Linked record ID	ID	Recommendation detail	Assigned To	Implementation due date	Implementation complete date	Due date	Complete date	Done date	
Clinical Incident Management System					20/03/2017	01/03/2017				Complete

Implementation Evidence

Enter a summary of the actions taken to implement the recommendation. For example, a surgical safety checklist has been updated and new versions have replaced existing versions in all clinical areas.

Additional evidence can also be attached to the recommendation as a [document](#).



Fields completed at completion of evaluation of a recommendation

Evaluation Details	
Due date (dd/MM/yyyy)	<input type="text"/>
Maximum total of 6 months to implement and evaluate recommendations. See CIM Policy for further information.	
Complete date (dd/MM/yyyy)	<input type="text"/>
Evaluation Evidence	<input type="text"/>
Enter a summary of the evaluation of the effectiveness of the recommendation (e.g. summary of audit results). Additional evidence can be attached to the recommendation as a document.	
Executive concur with the evaluation of this recommendation?	<input type="text"/>
Senior Staff discussed recommendations and actions with the notifier?	<input type="text"/>
Is further quality improvement activity required?	<input type="text"/>
Please also refer to your local quality improvement system.	
Additional comments	<input type="text"/>

Complete date

This is the date that evaluation of the effectiveness of the implemented recommendation has been completed.

This date can be completed manually by entering the date in the recommendation record and saving. It can also be completed by pressing the 'Complete' button in the 'Recommendations' listing in the incident record.

Recommendations									
Module	Linked record ID	ID	Recommendation detail	Assigned To	Implementation due date	Implementation complete date	Due date	Complete date	Done date
Clinical Incident Management System					20/03/2017	01/03/2017			Complete

Note: If the button is still visible the recommendation has not been completed.

Evaluation Evidence

Enter a summary of the evaluation of the effectiveness of the recommendation. For example, an audit of 40 surgical records on ward 2A in January 2017 revealed that 87.5% of surgical cases had the new surgical checklist completed correctly.

Additional evidence can also be attached to the recommendation as a [document](#).

Executive concur with the evaluation of this recommendation?

Executive should be made aware of the evaluation of effectiveness of recommendations made in response to clinical incidents.

Senior Staff discussed recommendations and actions with the notifier?

Feedback of the actions taken following notification of the incident can be invaluable in promoting a safety culture within a healthcare organisation. Surveys of end-users of WA Health Datix CIMS have indicated that notifiers of clinical incidents would like to receive updates on



how their clinical incident notifications have led to improvements in patient safety in their organisation.

Is further quality improvement activity required?

Evaluation of the effectiveness of recommendations developed in response to investigation of a clinical incident may identify that the desired outcome of the recommendation was not achieved and that further quality improvement activities are required in order to prevent reoccurrence of the clinical incident or reduce harm. If this is the case, answer 'Yes' to this question. This will generate a further free-text box where details about the planned activities can be entered. These quality improvement activities may also need to be entered in your local quality improvement system. Refer to your local Safety & Quality team for more information on local requirements.

Is further quality improvement activity required?

Please also refer to your local quality improvement system.

If yes, describe the action taken or planned

If the evaluation of effectiveness of the recommendation identified that the recommendation achieved the desired outcome and no further quality improvement activity is required at this stage, select 'No'.

Additional comments

Additional comments relevant to the recommendation can be entered here. This field is also accessed when the 'Complete' button in the 'Recommendations' listing in the incident record is clicked.

Recommendations									
Module	Linked record ID	ID	Recommendation detail	Assigned To	Implementation due date	Implementation complete date	Due date	Complete date	Done date
Clinical Incident Management System					20/03/2017	01/03/2017			<input type="button" value="Complete"/>

Any comments previously entered in this section in the 'Recommendations' form will be displayed in the below pop-up generated when the 'Complete' button is clicked. If no further comments are required, click Apply. If further comments are required, enter them after the previously entered comments.

Complete action [x]

Additional comments



Communicating the completed recommendation

Use the 'Communication & Feedback' function to notify the relevant staff member(s) that the recommendation is complete. This can be accessed by selecting [Communication & Feedback](#) from the left hand menu. Refer to your local safety and quality team if you are unsure of the relevant staff member(s) to notify.



Adding Documents to a Recommendation

Additional supporting documentation can be added to the individual recommendation record via the 'Documents' screen. Select 'Attach a new document' and follow the prompts to save a document to the recommendation record. Multiple documents can be added. Documents must be added individually.

The **Link as** field provides a drop down list of different types of documents to select from. Enter a brief description of the document e.g. the title into the **Description** field. Clicking on the **Browse** button allows the user to search their W or H drive for the document they wish to upload and then use the **Attach this file** button. Once **Save** is selected, the document will be uploaded.

Note: Documents added to an individual recommendation are **ONLY** visible and accessible in that recommendation. These documents will not be directly accessible from the related incident record or other recommendations that exist for the same incident.



Recommendations Added in Error

Recommendations that are added in error cannot be deleted from the system. Enter 'Recommendation written in error' in the 'Recommendation title' and 'Recommendation detail' fields and select 'Recommendation written in error' from the drop-down options in the 'Recommendation type' field.

<p>* Recommendation title</p> <p>This is a brief description of the aim of the recommendation.</p>	<input type="text" value="Recommendation written in error"/>
<p>* Recommendation detail</p> <p>Describe in detail what is planned. The recommendation should be SMART - Specific, Measurable, Accountable, Realistic, Time related.</p> <p>See CIMS Toolkit page16 for an explanation of SMART recommendations.</p>	<input type="text" value="Recommendation written in error"/> 
<p>* Recommendation type</p> <p>Select from the list the most appropriate description of your recommendation.</p> <p>See CIMS Toolkit page 17 for examples of types of recommendations.</p>	<input type="text" value="Recommendation written in error"/> 

Click 'Save' to record the changes and exit the recommendation record.



Action Chains

WA Health uses the Action Chains¹ in Datix CIMS exclusively for the management of SAC 1 clinical incidents. Action Chains belong to the 'Recommendations Module'.

The SAC 1 Action Chain comprises four steps (or actions) which are completed in sequential order as the SAC 1 clinical incident progresses through the Clinical Incident Management pathway.

Action chains							
SAC1 Clinical Incident Investigation							
Step	Action Type	Recommendation title	Assigned To	Start date	Due date	Complete date	Active
1	Notify	Notify the Patient Safety Surveillance Unit (PSSU) within 7 working days.				<input type="button" value="Complete"/>	Y
2	Investigate & Submit	Complete the SAC1 Clinical Incident Investigation using Root Cause Analysis or similar investigative methodology & submit completed Investigation Report to PSSU (due within 28 working days). Close event.					N
3	Implement	Review SAC1 Clinical Incident Recommendations to ensure completion within 6 months.					N
4	Evaluate	Review evaluation of SAC1 Clinical Incident Recommendations within 6 months.					N

Add a new action chain

The SAC 1 Action Chain is automatically generated when a clinical incident record is saved with the 'Severity Assessment Code (Confirmed)' of 'SAC 1'. The Patient Safety Surveillance Unit (PSSU) is responsible for the completion of steps 1, 2 and 4 of the SAC 1 Action Chain. Health Services must advise PSSU via 'Communication & Feedback' once the requirements of steps 1, 2 and 4 have been completed. Health Services may complete step 3 (*Implement: Review SAC1 Clinical Incident Recommendations to ensure completion within 6 months*) at their discretion.

¹ An Action Chain is a number of sequential events/steps that result in a particular outcome.



Action Form

Click on the steps of the action chain to display the 'Action Form' screen.

Reference	
Module	Clinical Incident Management System
Record	
Linked record ID	
Action ID	
Key dates	
Start date (dd/MM/yyyy)	
Due date (dd/MM/yyyy)	
Complete date (dd/MM/yyyy)	<input type="text"/>
Action ownership/responsibility	
Assigned by ('From')	
* Assigned To	<input type="text"/>
Action details	
* Priority	<input type="text"/>
Action Type	Implement
Recommendation title	Review SAC1 Clinical Incident Recommendations to ensure completion within 6 months.
* Recommendation detail	<input type="text"/>
Comment	<input type="text"/>
Action chain title	SAC1 Clinical Incident Investigation
Step number	3



Accessing Recommendations

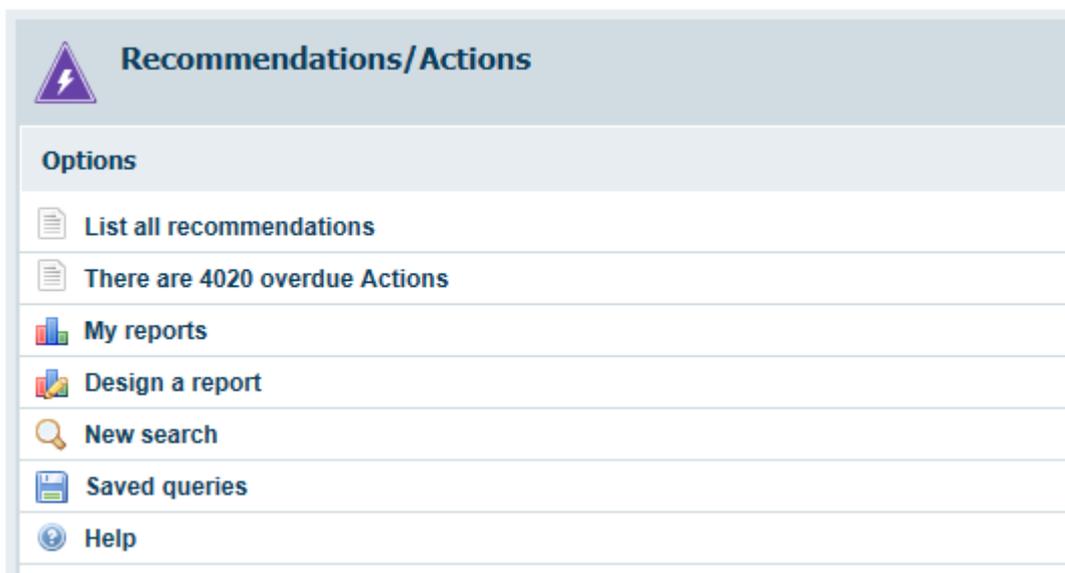
Recommendations can either be accessed via the 'Recommendations' listing in the incident record in which the recommendation was created or via the Recommendations Module. Access to clinical incident records may be restricted for some profiles once an incident record is closed. In these situations the Recommendations Module provides an alternative route to allow recommendation owners to complete their assigned recommendations.

Accessing the Recommendations Module

To access recommendations the assigned staff member will need to log in to Datix CIMS and click on the 'Recommendations / Action' link



The following screen will then display:



Accessing All Recommendations

To obtain a full list of all recommendations that you have permission to view, select 'List all recommendations' from the options list in the Recommendations Module.





A list of recommendations will then appear that are either:

- Currently assigned to the user (including SAC 1 Action Chains); or,
- Created in a clinical incident with a ‘[Place of clinical incident](#)’ within the user’s area of responsibility (excluding SAC1 Action Chains assigned to other users).

ID	Recommendation title	Recommendation detail	Assigned To	Implementation due date	Implementation complete date	Due date	Complete date
27004	Recommendation title	Recommendation detail		31/03/2017		30/06/2017	
27005	Recommendation title	Recommendation detail		14/04/2017		26/05/2017	

The recommendation records can be sorted by clicking on the column headings. For example, to display the recommendations by ‘[Due date](#)’ click on the column heading ‘[Due date](#)’. Clicking on a heading twice will reverse the order.

Accessing all Outstanding Recommendations

To obtain a list of all recommendations (including SAC 1 Action Chains) assigned to the user that have not yet been completed, access the ‘[To Do List](#)’ by clicking on the link shown below:

The ‘[To Do List](#)’ can be sorted by clicking on the column headings. For example, to display the recommendations by ‘[Due date](#)’ click on the column heading ‘[Due date](#)’. Clicking on a heading twice will reverse the order.

Accessing a Specific Recommendation

To search for a specific recommendation, select ‘[New search](#)’ from the options list in the Recommendations Module.

The search screen will then display with an option to search by ‘[Linked record ID](#)’ or ‘[Action ID](#)’ as well as a number non-unique identifier fields.



Reference	
Module	Choose <input type="button" value="v"/>
Linked record ID	<input type="text"/>
Action ID	<input type="text"/>

Linked record ID

The 'Linked record ID' is also called the 'Datix ID' in Datix CIMS and is unique to each clinical incident. It is a six digit number that is also included within the link included at the bottom of communication sent via 'Communication & feedback' as indicated here in the red box:

Please go to <https://datixcims.hdwa.health.wa.gov.au/index.php?action=incident&recordid=> to view the clinical incident.

The 'Linked record ID' can be used to search for all recommendations relating to a particular incident, including SAC 1 Action Chains.

Action ID

The 'Action ID' is specific to the individual recommendation. The 'Action ID' can be used to search for the particular recommendation you have been assigned. No other recommendations will display in this search.

Opening a Recommendation Record

Clicking on any of the fields of a recommendation will open the recommendation record. Once opened the record can be completed or edited as required. Should the user wish to view the related clinical incident they can then click on **Linked record** from the menu on the left side of the screen.

Note: If a user attempts to view a recommendation they do not have permission to access the following message will display

Information

- + Add a new incident
- + Generate from
- My reports
- Design a report
- New search
- Saved queries
- Help

You do not have the necessary permissions to view action ID 286.



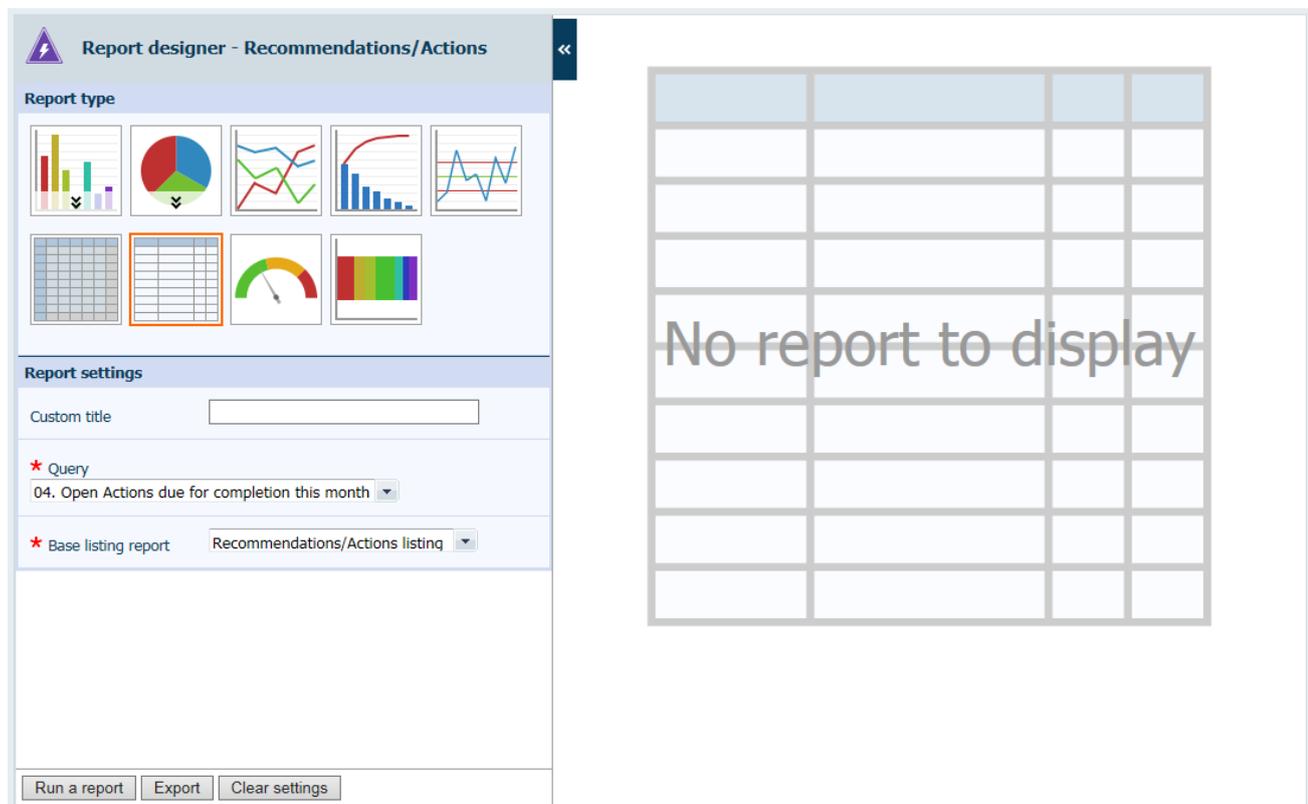
Recommendation Reports

Using standard queries

There are a number of pre-configured recommendation queries in Datix CIMS. To use these select 'Design a Report' in the 'Recommendations/Actions' module.



Select a 'Report type' from the icons, a 'Query' from the drop-down options and specify the further details required (based on the 'Report type' selected) then click 'Run a report'.



In this example the Query is Open Actions due for completion this month, the Report Type is Listing Report and this requires the selection of a Base listing report (the Recommendations/Actions listing report).



Using custom queries

To design a report using specific criteria select 'New Search'.

The screenshot shows a sidebar menu titled "Recommendations/Actions" with a lightning bolt icon. The menu items are: "Options", "List all recommendations", "There are 4020 overdue Actions", "My reports", "Design a report", "New search" (highlighted with a red box), "Saved queries", "List search results", "Clear the current search", and "Help".

The 'Recommendations/Action Form – Search for Records' screen displays.

The screenshot shows a form with several sections:

- Reference**: Module (Choose), Linked record ID, Action ID.
- Key dates**: Note: These dates are shared with CFM - Due date & Complete date relate to evaluation - please think about where they should be placed on the form. Start date (dd/MM/yyyy), Due date (dd/MM/yyyy), Complete date (dd/MM/yyyy).
- Action ownership/responsibility**: Assigned To.
- Action details**: Priority, Action Type. Note: This field relates to the CIMS SAC1 Action Chain and CFM.
- Recommendation title.
- Recommendation detail (text area with scroll arrows).



CIMS Specific Fields

Severity Assessment Code (Confirmed)

Causation Statement Summary

Contributing factors

Recommendation type

What will be measured / what will your outcome be?

How will this be measured?

Implementation due date

Implementation complete date

Implementation Evidence
Enter a summary of the actions taken to implement the recommendation (e.g. checklist updated, new equipment purchased). Additional evidence can be attached to the recommendation as a document.

Evaluation Evidence
Record the evidence of the evaluation of the implementation of the recommendation. Reference relevant documentation (eg Audit results of published procedure)

Is further quality improvement activity required?

Additional comments

Enter the required search criteria into the form (for example Recommendation type = Architectural/physical plant changes) and click 'Search'. The search results will display:

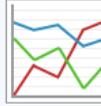
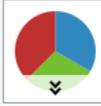
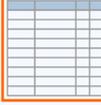
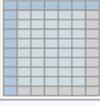
ID	Recommendation title	Recommendation detail	Assigned To	Implementation due date	Implementation complete date	Due date	Complete date
27004	Recommendation title	Recommendation detail		31/03/2017		30/06/2017	
27005	Recommendation title	Recommendation detail		14/04/2017		26/05/2017	

To convert the search results into a report click 'Design a Report'. The 'Report designer' screen will open.



 **Report designer - Recommendations/Actions** <<

Report type

Report settings

Custom title

* Query

* Base listing report

Ensure the 'Query' field states [Current criteria]. Select a 'Report type' from the icons and specify the further details required (based on the 'Report type' selected) then click 'Run a report'.



Further Information

For further information with regard to notifying a clinical incident please refer to the:

- WA Health Datix CIMS ELearning Notifier Guide which is located at the Clinical Incident Management System website. http://ww2.health.wa.gov.au/Articles/A_E/Clinical-incident-management-system
- The Clinical Incident Management Policy which is located at the Clinical Incident Management System website. http://ww2.health.wa.gov.au/Articles/A_E/Clinical-incident-management-system

Additionally, please contact your supervisor or Safety and Quality staff member for further assistance.



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

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