

Datix Guidance Document

Managing and approving contacts

New staff or Service Users that have not yet been added on Datix will need approving for the first time (i.e. If the correct contact record does not appear in the Datix list then the contact needs to be manually approved).

Unapproved	If it's BLUE – You need to do!
Approved	If it's GREEN – it's been seen!

STEP 1 – Check names

- Select unapproved contacts by clicking on surname.

Person Affected Section
Please ensure all contacts are approved. Remember "blue you need to do" whereas "Green has been seen". Click [HERE](#) to open the Contact Approval guidance

Approval status	Forenames	Surname	Type	Subtype	Orchard Person No	Injury (Primary)	Body part (Primary)	Treatment	Contact role
Unapproved	Jack	Jones	Member of Public / Relative	Member of Public		Fracture	Ankle (Left)	Ambulance attended and taken to A&E	Person Affected

Create a new Person Affected link

All Other Contacts Section

Approval status	Forenames	Surname	Type	Subtype	Orchard Person No	Contact role
Approved	Suzanne	Lomax	Staff	Risk System Administrative Assistant		Reporter

Create a new Other Contact link

STEP 2 – Check for Matching Contacts

- Check name is spelt correctly.
- Click 'Check for Matching Contacts' to check if the person already has an existing Datix contact record.

Person Affected

Contact details

Print

+ Create a new contact
≡ List all contacts
My reports
Design a report
New search
Saved queries
Manage duplicates
Help

Contact details

Type: Member of Public / Relative

Subtype: Member of Public

Forenames: Jack

Surname: Jones

Current approval status: Unapproved

Was the person injured in the incident? ☒

Injury details

Injuries

Injury: Fracture

Body Part: Ankle (Left)

Add another injury

Treatment: Ambulance attended and taken to A&E

Check for matching contacts Unlink contact Back to incident

STEP 3 – Approving and linking Contacts

MATCHING CONTACT FOUND

- If matching contacts are found, a list of names that already have a Datix contact record appears.
- Choose the relevant name if available. If not, click Cancel.
- In this example Jack Jones already exists within Datix contacts therefore, click Choose.

Choose	Approval status	Forenames	Surname	Type	Subtype
Choose	Approved	Jack	Jones	Member of Public / Relative	Member of Public
Choose	Approved	Jackie	Jones		
Choose	Approved	Jenna	Jones	Staff	

- The chosen “Approved” contact details for Jack Jones will be displayed (highlighted in green) - this contact now requires linking to this incident.
- To link the contact, select Create New Link.

Role	Person Affected
Type	Member of Public / Relative
Subtype	Member of Public
Forenames	Jack
Surname	Jones
Current approval status	Approved
Approval status	Approved
Was the person injured in the incident?	☐

- The approved contact will now be linked to the incident and highlighted in green, which means it has been seen and approved. You will then be returned to the main page.

Approval status	Forenames	Surname	Type	Subtype	Orchard Person No	Injury (Primary)	Body part (Primary)	Treatment	Contact role
Approved	Jack	Jones	Member of Public / Relative	Member of Public		Fracture	Ankle (Left)	Ambulance attended and taken to A&E	Person Affected

NO MATCHING CONTACT FOUND

- If no matching contacts are found, click Cancel and go back to the contact record.

- In this example Jack Jones does not exist within Datix contacts, therefore, click Cancel.

Choose	Approval status	Forenames	Surname	Type	Subtype
Choose	Approved	Jackie	Jones		
Choose	Approved	Jenna	Jones	Staff	

- Click on the Approval Status drop-down field (highlighted in blue) and select Approved making sure Jack's details are correct.

Contact details	
Type	Member of Public / Relative
Subtype	Member of Public
Forenames	Jack
Surname	Jones
Current approval status	Unapproved
Approval status	Unapproved
Was the person injured in the incident?	☒

- Click Save to add the new approved contact to Datix. The approved contact will now be linked to the incident and highlighted in green on the main page, which means it has been seen and approved.

① Next time you search for an approved contact it will already exist in Datix.

① Approved Contact records will build up as people are involved in Incidents, Risks, Complaints etc.

① **ALWAYS CHECK FOR MATCHING CONTACTS. IF YOU APPROVE CONTACTS WITHOUT CHECKING YOU WILL DUPLICATE CONTACTS IN DATIX**

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| <p>➤ Repeat Steps 1-3 for all UNAPPROVED contacts.</p> | |
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