

Datix Guidance Document

Managing and approving contacts

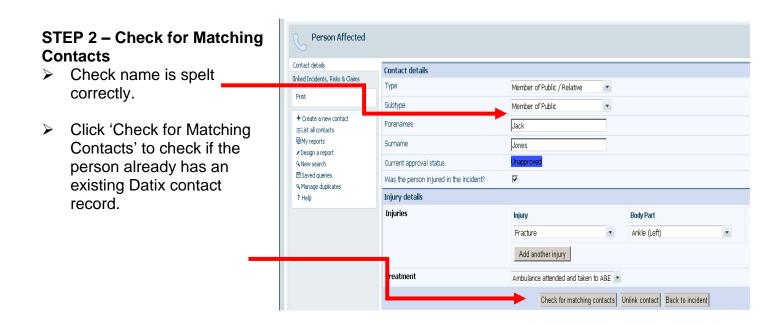


New staff or Service Users that have not yet been added on Datix will need approving for the first time (i.e. If the correct contact record does not appear in the Datix list then the contact needs to be manually approved).

Unapproved If it's BLUE – You need to do!

Approved If it's GREEN – it's been seen!

Person Affected Section asser Microsca decade. Sase ensure all contacts are approved. Remember "blue you need to do" whereas "Green has been seen". Click HERE to open the Contact Approval guidance STEP 1 - Check names Body part Approval status Subtype Injury (Primary) Contact role Select unapproved Ambulance contacts by clicking on Member of Person Affected Jack Jones Ankle (Left) attended and Relative taken to A&E surname. Create a new Person Affected link All Other Contacts Section Approval status Subtype Orchard Person No Contact role Forenames Surname Risk System Administrative Assistant Suzanne Lomax Staff Reporter Create a new Other Contact link





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.



- 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.



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.

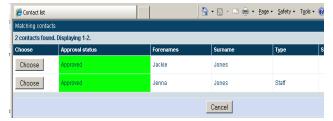


NO MATCHING CONTACT FOUND

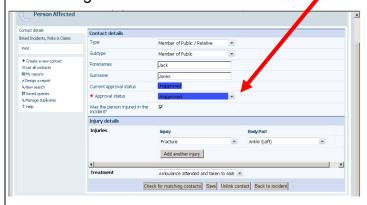
If no matching contacts are found, click Cancel and go back to the contact record.



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



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



- 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.
- 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



>	Repeat Steps 1-3 for all UNAPPROVED	
	contacts.	