

Datix Guidance Document

Reporting an Incident using Datix Incident Form (DIF1)

Datix Incident Reporting Form (DIF1)

All staff will be trained on importance of Incident Management and how to report an Incident using the Datix Incident Reporting Form (DIF1).

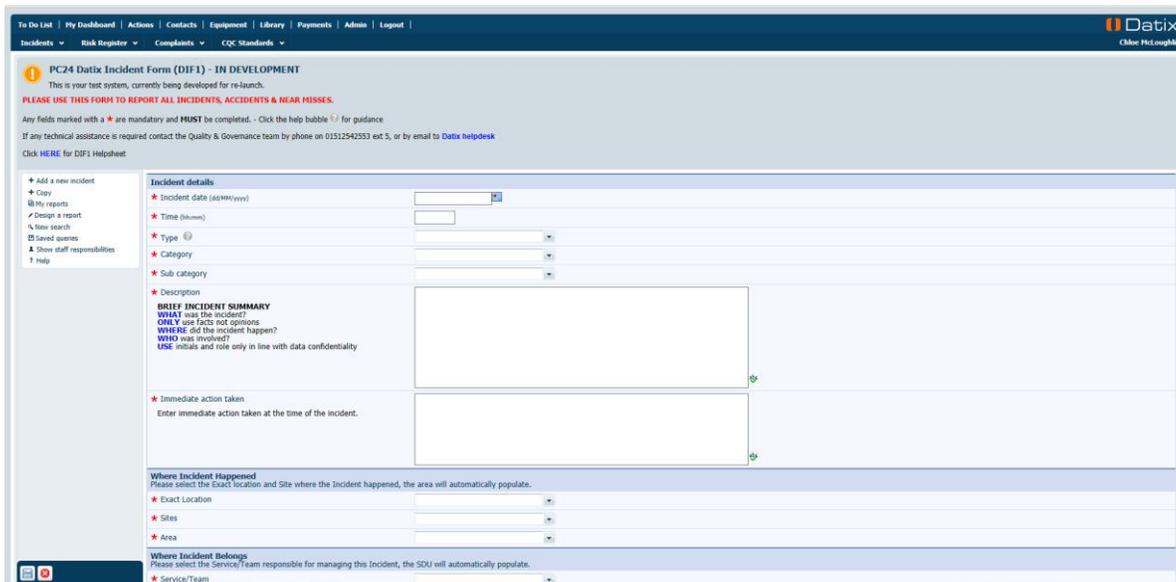
All Incidents should be reported within 24 hours of the incident occurring.

To access DATIX from your desktop:

→ Click on the DATIX icon on your desktop



→ A blank Incident Reporting Form (DIF1) will appear on screen:

A screenshot of the PC24 Datix Incident Form (DIF1) web interface. The page title is "PC24 Datix Incident Form (DIF1) - IN DEVELOPMENT". It includes a navigation menu at the top with options like "To Do List", "My Dashboard", "Actions", "Contacts", "Equipment", "Library", "Payments", "Admin", and "Logout". The main content area has a left sidebar with navigation options: "Add a new incident", "Copy", "My reports", "Design a report", "New search", "Saved queries", "Show staff responsibilities", and "Help". The main form area is titled "Incident details" and contains several sections: "Incident date (ddMM/yyyy)", "Time (hh:mm)", "Type", "Category", "Sub category", "Description", "BRIEF INCIDENT SUMMARY" (with instructions: "WHAT was the incident?", "ONLY use facts not opinions", "WHERE did the incident happen?", "WHO was involved?", "USE initials and role only in line with data confidentiality"), "Immediate action taken" (with instruction: "Enter immediate action taken at the time of the incident."), "Where Incident Happened" (with instruction: "Please select the Ward location and Site where the incident happened, the area will automatically populate."), and "Where Incident Belongs" (with instruction: "Please select the Service/Team responsible for managing this Incident, the SDU will automatically populate.").

OVERVIEW FOR COMPLETING THE DATIX INCIDENT REPORTING (DIF1) FORM:

- The Datix Incident Reporting Form (DIF1) will open different sections depending on the type of Incident and who is involved.
- Always use the Search box when adding Contacts to avoid creating duplicate contact records. Type in the first name and surname and click on the Search box. This will check for matching contacts (people) that have already been added within the system and they can then be selected. Please make sure if the contact is already listed here that you 'Choose' this contact. If the Contact required does not show, 'Create new contact'.
- **[Incident Managers \(DIF2 Managers\) have been added as Contacts within Datix](#)** and can be found using the first name and surname. If a name cannot be found, retype the name in a different way (e.g. John/J* or William/Bill).

- **Patients have not been added as Contacts** and they will need to be entered manually if they are involved in an incident. Once their details have been entered and approved the first time, they will then be available to select for any future incidents.

Any queries should be referred to your PC24 Datix Administrators on datix@pc24.nhs.uk.

DATIX icons:

Mandatory fields -

 This symbol means the field is mandatory and MUST be completed before the form can be submitted.

Help Bubble -

Click  for help and guidance in completing this form.

Single Code fields -

Click  and select from the codes or type the first few letters directly into the field to find the required information.

Spell Check -

Click  (below all free text fields) to spell check free text. Any incorrectly spelled words are highlighted in red, and you can choose corrections from the options available.

Multi-Pick fields -

Click  and select one or more codes by highlighting and double-clicking to add codes in the field above.

If the wrong code is selected, highlight the code in the top field and click the  icon (top right) to remove.

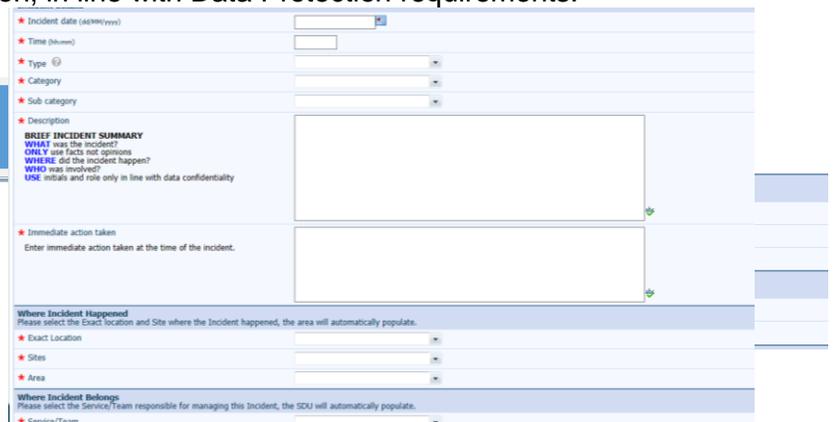
INCIDENT DETAILS:

Complete all fields in this section.

- Additional information may be required, depending upon the categories selected.
- The **Type** field indicates the “type of person” directly affected by the Incident. Please select **“Property/Trust affected”** if **no persons are directly affected/involved** (e.g. evacuation due to a Fire Alarm). NB. This will mean that the Person Affected Section will not open
- A Near Miss is an unplanned event that did not result in harm but had the potential to do so.
- In the **Description** and **Immediate action taken** fields, enter facts not opinions to describe what has happened. Use the person’s role and initials (e.g. Patient FB or Staff Member JS).
- DO NOT enter full names within the description, in line with Data Protection requirements.
- Click  for guidance.

LOCATION:

incident took place in, e.g. ‘Med Car 6’, ‘Corridor’, ‘Call Centre’.



The screenshot shows the 'INCIDENT DETAILS' section of the PC24 Datix form. It includes fields for Incident date (MM/YY), Time (hh:mm), Type (with a help bubble), Category, and Sub category. Below these is a 'Description' field with a 'BRIEF INCIDENT SUMMARY' section containing prompts: 'WHAT was the incident?', 'ONLY 1 line facts not opinions', 'WHERE did the incident happen?', and 'WHO was involved?'. There is also a field for 'Immediate action taken' with the instruction 'Enter immediate action taken at the time of the incident.' At the bottom, there are sections for 'Where Incident Happened' (Exact Location, Sites, Area) and 'Where Incident Belongs' (Service/Team).

- Once you have selected the 'Exact Location', select which 'Site' the incident took place in, e.g. 'Alder Hey Hospital', 'Crosby GP Practice', 'Patient Home'.
- Once a 'Site' is selected, the 'Area' should automatically populate. For non-specific sites such as 'Patient Home', 'Area' should remain blank.

DETAILS OF THE PERSON AFFECTED:

- Enter Type of Person, First Name and Surname then click . If person already has a Datix contact record, choose the matching record.
- Make sure you add any **Injuries** and **Treatment** required. The injuries section will automatically appear if the incident affects any kind of person.
- If you need to add more than one person affected just click to record additional contacts.

DETAILS OF OTHER PEOPLE INVOLVED:

- If there were any other people involved in the incident, answering 'Yes' will open the 'Other people involved' section.
- The **Contact Role** describes the part the person played in the Incident. This field will initially display **Person Responsible** however this can be amended to the appropriate role e.g. 'Witness', 'Person injured/affected'.
- Witnesses need to have been present at the time of the incident, rather than heard about it later.
- It is important that all contacts are added so they are linked to the record. Click **Add another** (bottom left of section) to enter details of additional contacts.

DEGREE OF HARM AND INCIDENT LEVEL:

- Degree of Harm – refers to physical harm caused.
- If no Person is affected by the incident, select 'No Harm'.
- Refer to the Incident Level Guidance by clicking the link and select the appropriate incident Level.

DOCUMENTS REQUIRED AND DOCUMENTS SECTION:

- This section allows you to attach any documents you have saved locally for evidence.
- **Link as** – select the relevant type of document being attached e.g. Photograph / E-mail / Letter.
- Type a relevant **Description**.
- Locate and attach the files by clicking on **Browse**.
- Click **Add another** to upload more documents.

DETAILS OF THE PERSON REPORTING THE INCIDENT

- Enter the **First Name**, **Surname** and **Job title** then click Search to check if the staff member is already an approved contact.
- **Email** and **telephone number** will be automatically populated if an approved contact is selected but may need to be entered the first time.

Details of person reporting the incident	
★ First names	<input type="text"/>
★ Surname	<input type="text"/>
★ Job title	<input type="text"/>

MANAGER:

- Select **Your Manager** to identify the relevant Manager for your Service to manage the incident.
- This person will be automatically notified of the incident being reported.

Your Manager	
★ DIF2 Manager	<input type="text"/>
<input type="button" value="Save"/>	

SUBMIT THE FORM

- Click once all sections have been fully completed.
- If information is missing, an alert message will indicate fields that need completing before the form can be submitted.
- Click New Form (top left of screen) to open a blank DIF1 Form.

The following fields need to be filled in before you can submit the form:

- Description
- Immediate action taken
- Incident date
- Time
- Area
- Service Delivery Unit (SDU)
- Service/Team
- Sub category
- Degree of Harm
- Your manager
- Exact Location
- Site
- Is Safeguarding Required?
- Incident Level
- Are there any documents to be attached to this record?
- Type of premises?
- Potential number affected?

EMAIL NOTIFICATIONS

identified within category specific sections, e.g. Medical Leads or Health and Safety Manager, for information purposes.

- A message will appear on screen detailing who the email notifications have been sent to.
- An automated acknowledgement email will be sent to the reporter with the datix reference number.

CATEGORY SPECIFIC SECTIONS

Additional Sections may open on the DIF1 Form Depending upon which category or type of incident is selected.

Category Specific Sections contain additional fields to be completed which are relevant to that category but are hidden unless required. Some examples of common Category Specific Sections are:

Example 1 – Information Governance Section

- This section will open where:
 - **Information Governance** is selected as a category.

Information Governance	
★ Type of data involved?	<input type="text"/>
★ Type of media?	<input type="text"/>
★ Type of premises?	<input type="text"/>
★ Potential number affected?	<input type="text"/>
★ Type of security?	<input type="text"/>

- As you can see, the questions and fields gather additional information about the incident.

- These fields can be used for analysis of similar types of incidents to identify any common themes and lessons learned.

Safeguarding	
* Is Safeguarding Required?	Yes
* Type of Safeguarding	
* Was capacity considered?	
* Was consent to share concerns sought?	
* Safeguarding referral action taken	

Example 2 - Safeguarding Section

- Any incident affecting a patient will automatically open the **Safeguarding** section
- If this section is not required, simply select 'No'.