

'How to' Guide – Incident Reporting





How to Report an Incident (DIF1)

At Salisbury NHS Foundation Trust we use the term Incident reporting, which can also be known as adverse event reporting.


To report an incident (DIF1) you **do not** need to login to DATIXweb, just go to the Intranet and select the above icon and the Incident Report Form (DIF1) will appear. The icon is situated just above the MLE and spIda on the Intranet.



Users Quick Guide



- A  indicates a mandatory field. All mandatory fields must be completed, otherwise you will not be able to save and submit the incident form.

- Click  to open the list and choose a value. Some of these fields require you to select a Yes or No, if you select Yes more fields may appear. For example: when selecting Yes for "Are you reporting a slip, trip or fall?" additional fields will appear to ask whether the fall caused a fracture or serious harm. Sometimes a new screen will appear, for example: Medication


Some of these fields are multi-pick lists where you can select more than one option. They work slightly differently please see below for further guidance.

- Click  to open calendar and choose date. Or you may type in the date range in the following format dd/MM/yyyy.

- Click  to find out more information about a field. When you click on the  next to a field, a DATIX Help screen will appear offering extra advice.

- Click  to use spellcheck (for free text fields). Words that DATIX does not recognise will turn red. Click on the word and DATIX will create a list of alternatives for you to choose the correct word. Then select  to come out of Edit mode, otherwise your changes will not be saved.

- Multi-pick lists (see picture below) gives you the option to select more than one option in the dropdown. Open the list and choose multiple values by either double clicking on each value you choose one at a time, or by clicking on each value once (they will turn grey), then double click the last value you choose.

- In a multi-select field, where you can choose more than one option from a dropdown, clicking this icon  will remove the currently selected value(s).



1. Incident details

In the **Type** field select the type of person/people that have been affected by the incident. This will allow the form to collapse or expand depending on the type of incident you choose in the Type field.

Choose *Incident affecting Multiple people / Organisation* if the incident has affected more than one person, whether they are staff, patients or visitors or a mixture. For example: a fire on a ward would affect staff, patients and visitors, therefore you would choose Incident affecting Multiple people / Organisation.

Some of the fields require a Yes or No answer. When a Yes is chosen this will allow an email notification to be sent to the appropriate professional, *for example: selecting Adult Safeguarding will send an email notification to the Adult Safeguarding Lead.* It also enables more questions to appear.

Some fields will appear as a multi-pick list which enables you to select more than one value, *for example: 'Are you reporting a Nursing Red Flag?' and 'Who else needs to be informed?'*

Description and Action Taken

The Description and Action taken fields are text fields. Enter facts, not opinions. **Do not** give any person identifiable information in this section i.e. patient/staff names, date of birth, hospital numbers etc..

2. Location of incident

Location (exact) select the ward/department where the incident took place.

Once the Location (exact) has been selected DATIX will backfill the Specialty, Directorate, Unit and Trust fields. However, this will not work if you choose the following codes:

- All clinical areas
- All office areas
- Directorate wide
- Trustwide
- Trust corridor

If you choose any of the above codes then you will need to complete the Specialty, Directorate, Unit and Trust fields.

Location (type) the incident happened in i.e ward/adjacent areas, recovery, waiting room / reception.

3. Classification of Incident

The Stage of Care field is the only mandatory field in the section. Select the appropriate Stage of care from the dropdown list. The Detail and Adverse event fields are not mandatory, however you can complete these if you are able to. The code you select in the Stage of Care field determines what appears in the Detail field, then the code you select in the Detail field determines what appears in the Adverse event field. Choosig the correct Stage of Care will make it easier to select from the next two fields.

4. Incident Result and Severity

This relates to the **ACTUAL** outcome for the person affected and where the harm has been caused by an act or omission of Trust activity.

Incidents occurring outside of the Trust or as a result of a service by a provider are

graded as No Harm i.e. community acquired pressure damage, external provider transport issues.

5. Other people involved

If you select yes a new screen appears called Contacts, Details of Person Involved. In this section you would add anyone that is associated with the incident: for example witnesses to the incident, the details of the doctor that examined the patient post fall etc.

At the bottom of that section you may select Add Another to add more people.

6. Reporter

This is requesting details of the person reporting the incident. This is you. Please complete the fields. If you wish DATIX to send you an acknowledgement email with the reference number of the incident please ensure you add your email address.

7. Investigating Manager

This will be the person expected to investigate and respond. If you are unsure please choose your line manager.

Sometimes staff from other specialist areas need to be informed/made aware of incidents. In the "Who else needs to be informed?" field you can add more than one specialist as this is a multi pick list. The list is based around staff roles or departments not individual staff names.

In the dropdown highlight each specialist you want to inform of the incident by clicking on the job role once then clicking the next job role. You can scroll down and it will keep the ones selected highlighted. On your last selection double click and all will appear in the box above.

Or you may select one at a time by double clicking on your first choice, it will then appear in the box above and then double clicking on another choice etc.

If you make a wrong selection click on the incorrect specialist and then click on the red cross on the right handside of the box.

8. Documents

If you have any document to attach i.e. handover sheet found in car park etc. The document will need to be scanned and saved in a file. When you select "Browse" DATIX will direct your search for the document on your computer.

9. Duty of Candour

If your incident has been graded as a moderate, major or catastrophic the Duty of Candour fields will appear. This is a mandatory field due to the legal requirements of the Trust. Please complete as many of the fields as possible

Access to the Incident Review/Management Form (DIF2) will be given on approval from the Line Manager and Risk Management and is for staff that need to manage and investigate incidents. Access is given once training has been completed.