1. REPORTING AN INCIDENT ON DATIX (WEB)

Go to the Intranet Homepage:  [http://intranet/default.asp](http://intranet/default.asp)

Scroll to the ‘Report an Incident’ and when moving your mouse over on the text ‘Report an Incident’ this allows you to click into the Web Form and open it.

2. Who Does the Incident Affect?

- Patient (In-patient, Out-patient, Day Case patients)
- Staff (WWL Employees, Volunteers, Students, Agency/Locum)
- Visitor / Contractors / Members of the Public
- The Organisation (eg IT, Information Governance, Services, Premises, Reputation)

A number of icons are available to help you will appear at the top of the form eg:

- A mandatory field
- Help text for a particular field
- Spellchecks the field directly above it
- A field where you can choose more than one value

Choose one of the above options dependent upon what or whom the incidents relates to.
3. The example below is the option to choose for a ‘Patient Safety’ ‘Clinical’ incident.

The system will also bring up an ‘Alert’ which informs you that you can add another ‘person affected’ to the incident. Click ‘OK’ to remove the Alert. By clicking the ‘Add Another’ button this allows you to add another person affected/involved to the incident.

Once the Incident Type is chosen the blank form will appear for completion.

4. If you wish to report a ‘Staff’ related incident eg Needle stick Injury or Staff fall, please choose ‘Staff (WWL Employees, Volunteers, Students, Agency/Locum)’
4b. Once ‘Staff’ has been chosen this will allow you to add the details of the ‘Person(s)’ affected and then ‘Details of the incident’ – then go to ‘Point 7 (below) and follow the next steps’:

5. If you require to report an ‘Information Governance incident, SSDU incident, or IT incident’ etc – or the incident involves an ‘Organisational’ element, please choose ‘The Organisation (eg IT, Information Governance, Services, Premises, Reputation)’

5b. Once ‘The Organisation’ has been chosen complete the ‘Details of the incident eg Incident Date’ and go to Step 8 (below) for Site.
6. Once you have made your selection for ‘Who Does The Incident Affect’ selection complete the rest of the form eg ‘Patient’ complete the details section eg Type (Patient), Title, Forenames, Surname, Date Of Birth (either type in the date dd/mm/yyyy or use the mini calendar at the side of the selection), Patient (Hospital Number), Gender, Ethnicity, Was the person injured in the Incident (yes/no). As you will see these fields are ‘Mandatory’.

7. Complete the details of the incident eg Incident date by clicking on the calendar icon

8. When you click on the drop down arrow for ‘Site’ where the incident occurred this will bring up all of WWLFT Site Selections.

Choose a Site from the list by double clicking the text which will highlight in grey when scrolled over:

9. Once a ‘Site’ is chosen by double clicking on the Site name this will expand the Selection for Division:
10. Choose the relevant ‘Division’ in which the incident occurred which will then expand the Selection for Directorate:

<table>
<thead>
<tr>
<th>Site</th>
<th>Site where the incident occurred</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division</td>
<td>Division where the incident occurred</td>
</tr>
<tr>
<td>Directorate</td>
<td>Directorate where the incident occurred</td>
</tr>
</tbody>
</table>

11. Choose the relevant Directorate relating to the where the incident occurred which will then expand the Selection for Specialty

<table>
<thead>
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</tr>
<tr>
<td>Directorate</td>
<td>Directorate where the incident occurred</td>
</tr>
<tr>
<td>Specialty</td>
<td>Specialty where the incident occurred</td>
</tr>
</tbody>
</table>

12. Once Specialty is chosen this expands the Selection for Location Type eg Ward, Department, Car Park, Corridor etc:

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
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</tr>
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<td>Directorate</td>
<td>Directorate where the incident occurred</td>
</tr>
<tr>
<td>Specialty</td>
<td>Specialty where the incident occurred</td>
</tr>
<tr>
<td>Type of Location</td>
<td>Type of Location where the incident occurred</td>
</tr>
</tbody>
</table>

13. Choose the location type eg Ward/Adjacent Areas (from the list) which then brings up the selection for Location Exact:

<table>
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<td>Specialty where the incident occurred</td>
</tr>
<tr>
<td>Type of Location</td>
<td>Type of Location where the incident occurred</td>
</tr>
<tr>
<td>Exact Location</td>
<td>Exact Location where the incident occurred</td>
</tr>
</tbody>
</table>
14. Next Steps to complete are the Category and Sub-Category of the incident you are reporting. Whichever Category you choose will bring up relevant selections within Sub-Category (NB. Each Category had its own particular Sub-Category Sections to choose from).

Click the drop down arrow to display the selections to choose:

15. Choose the relevant Category for the incident you are reporting eg: Fall – patient slip, trip or fall

16. Choose the relevant Sub-Category for the fall you are reporting eg: Attempting to Mobilise with Walking Aid Unsupervised

17. Enter the Description of the incident. **DO NOT** enter personal identifiers (in any of the free text boxes) – instead use initials & job title (if staff) and/or patient A or patient B (if more than one patient)
18. Next step is grading the incident you are reporting by the ‘Result’ and ‘Severity’ and then selecting the most appropriate ‘Reporter’s Risk Grading’ of the incident.

19. By Choosing ‘No Harm/Injury’ from the drop down menu selections in Result this will only allow you to choose ‘No Harm/Injury’ in the ‘Severity’ Section.

20. If you choose ‘Injury/Harm’ in Result then you will have more selections to choose from in Severity (Please Choose Carefully)

21. Complete the correct selection for the Risk Grading of the incident you are reporting:

For Example:

Likelihood = Possible (May recur occasionally)
Consequence (Initial) = None
Grade (Initial) = Very Low
22. Once the Risk Grading of the incident is complete, the next step to complete is the 'Approval Status'. This will always be one selection to choose: Double click the grey = New Incidents to be Opened:

![Image](attachment:approval_status.png)

23. Mandatory Information:

   This next Section is to be completed dependent upon the type of incident you are reporting eg: Medication Incident, Violence & Aggression Incident or if Equipment was involved.

![Image](attachment:mandatory_information.png)

24. When you click on the drop down arrow eg 'Medication Incident' = click 'Yes' = this expands further information required to be completed in the relevant sections using the drop down arrows

![Image](attachment:medication_incident_details.png)
Further Example: when reporting a ‘Violence, Abuse, Theft, Loss or Damage’ Incident

When you tick yes (above) the following will display for completion using the drop down menus:

25. If you wish to attach a document eg, risk assessment, email, procedure, notes, witness statements etc when Reporting An incident tick ‘YES’ in the document Box which will open up further selections to allow you to attach and give your document a name (you document must be saved on your system to allow this to be attached). You can attach a number of documents.
26. When all the above steps are complete the next Section is for the Reporter of the incident. This Section is all about you eg name, role, email address (WWL email address – eg joe.bloggs@wwl.nhs.uk – if you are unsure of this you will find your email address in the Address Book in Windows Outlook)

Any wrong spellings within the email address and this will not generate the feedback message/information you require.

Please DO NOT use personal email address such as gmail/hotmail/btinternet

27. Would you like to receive feedback on the incident you have reported once the investigation and lessons learned have been completed?

Please choose ‘YES’ in the ‘Feedback Box’ – Remember: Your WWLFT email address needs to be correct (As above) for the feedback to properly

28. Choose the Divisional Incident Lead by selecting using the drop down arrow. This is the person who will initially review this incident and assign an appropriate ‘investigator’ eg, Ward Manager, Line Manager, Matron, Head of Nursing for the Division or Governance Lead for the Division.

29. Finally click ‘Submit’ to submit your incident form which will go to the Governance Team which will enable full reporting and investigation of this incident.

30. If you need further assistance please contact the Datix Administrator via email: Datix.Incidents@wwl.nhs.uk