



## Once for Wales Concerns Management System

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# Datix Cymru

## Community Pharmacy Patient Safety Incident Reporting and Management

### Quick Reference User Guide

V2c November 2022

## Introduction

Community pharmacies are required under the Clinical Governance requirements for community pharmacies in Wales to report appropriate patient safety incidents.

Following the de-commissioning of the National Reporting and Learning System (NRLS) on 31 March 2022, the Once for Wales Concerns Management System (Datix Cymru) will be made available for independent community pharmacy contractors, as a successor to NRLS, to report patient safety incidents to the relevant Health Board in NHS Wales from 1 April 2022. Access to the system is via a dedicated website, which contains the links to the relevant Health Boards.

## Website access:

English: <https://nwssp.nhs.wales/all-wales-programmes/community-pharmacy-patient-safety-incident-reporting-wales/>

Welsh: <https://pcgc.gig.cymru/rhaglenni-cymru-gyfan/adrodd-ar-ddigwyddiadau-diogelwch-cleifion-fferylliaeth-gymunedol/>

The Once for Wales Concerns Management System (Datix Cymru) provides a consistent Cloud based solution for incident reporting across NHS Wales and was launched on 1 April 2021. This revised approach to incident reporting has been agreed by Welsh Government, supported by the Once for Wales Concerns Management Central Team based in NHS Wales Shared Services Partnership (NWSSP). This approach will allow the capture of patient safety incidents and enable analysis of data within Wales.

## Help with Reporting

The Once for Wales Concerns Management Central Team are based in NHS Wales Shared Services Partnership (NWSSP) and will host the website. If you have any queries regarding the reporting process or any technical issues, please contact:

[OnceForWales.CMS@wales.nhs.uk](mailto:OnceForWales.CMS@wales.nhs.uk) – this inbox is monitored Monday to Friday 0900-1700.

## User Feedback

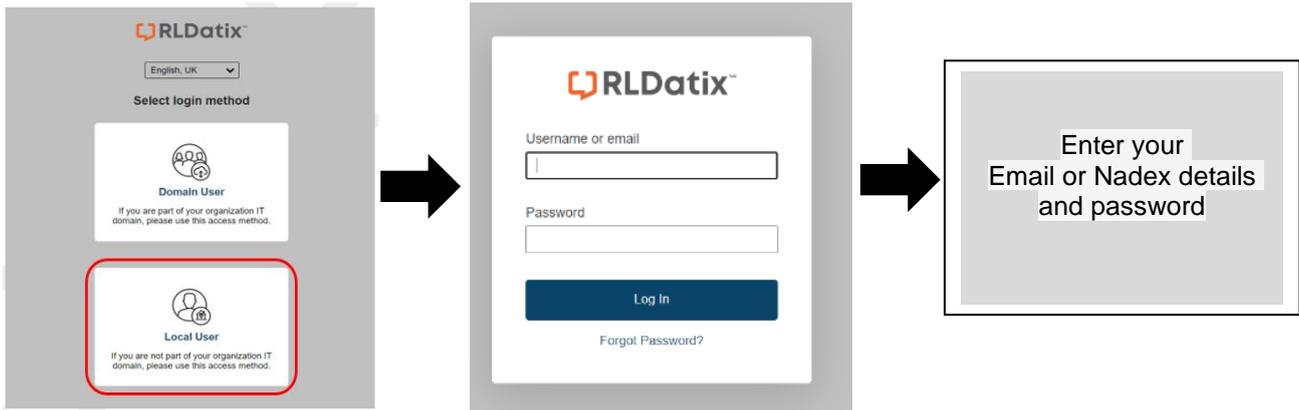
We would be pleased to receive any feedback on the reporting process to inform improvements please email the Once for Wales Concerns Management Central Team:

[OnceForWales.CMS@wales.nhs.uk](mailto:OnceForWales.CMS@wales.nhs.uk)

## Accessing the Form

The website contains links to the Health Boards RLDatix reporting systems. The bespoke Incident Reporting Form can be accessed by a URL link via Nadex or a logged-out form.

### Logged in Form

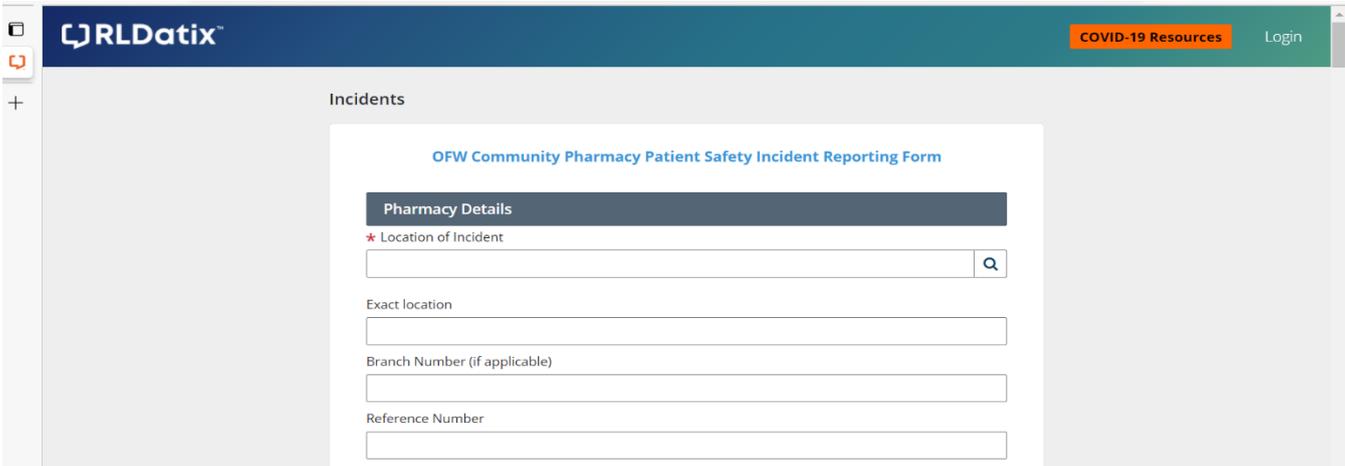


### Link to logged out access

Access for colleagues with no password / Nadex is also via the website and link to the logged out form. Incidents can still be reported and submitted but there is reduced functionality via this route e.g., the Master Patient Index (MPI) is not searchable, and the reporter will not be able to go back in the system and view the submitted report.

## Landing Page

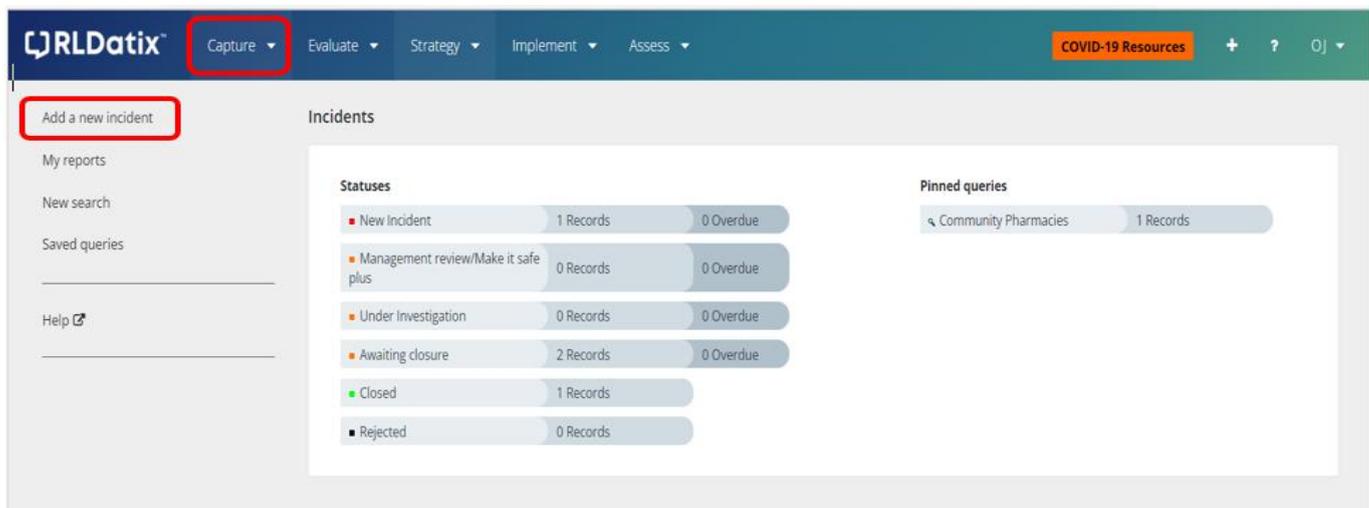
If you are logged out of the system you will be taken straight to the reporting form.



The screenshot shows the RLDatix interface. At the top, there is a navigation bar with 'RLDatix' on the left, 'COVID-19 Resources' in an orange box, and 'Login' on the right. Below the navigation bar, the main content area is titled 'Incidents'. In the center, there is a form titled 'OFW Community Pharmacy Patient Safety Incident Reporting Form'. The form has a section for 'Pharmacy Details' with the following fields: 'Location of Incident' (with a red asterisk icon and a search icon), 'Exact location', 'Branch Number (if applicable)', and 'Reference Number'.

If you are logged into the system, please:

1. Click Capture > Incidents in the top application menu.
2. Click Add new Incident in the left-hand navigation menu.



The screenshot shows the RLDatix dashboard. At the top, there is a navigation bar with 'RLDatix' on the left, a 'Capture' dropdown menu highlighted with a red box, and other menu items: 'Evaluate', 'Strategy', 'Implement', and 'Assess'. On the right of the navigation bar, there is an orange 'COVID-19 Resources' button, a plus sign, a question mark, and a user profile icon. Below the navigation bar, the main content area is titled 'Incidents'. On the left, there is a navigation menu with 'Add a new incident' highlighted with a red box, and other options: 'My reports', 'New search', 'Saved queries', and 'Help'. The main content area shows a 'Statuses' section with a table of incident counts and a 'Pinned queries' section with a query for 'Community Pharmacies'.

Status	Records	Overdue
New Incident	1 Records	0 Overdue
Management review/Make it safe plus	0 Records	0 Overdue
Under Investigation	0 Records	0 Overdue
Awaiting closure	2 Records	0 Overdue
Closed	1 Records	
Rejected	0 Records	

## Aspects of the Form

-  This icon indicates that a field is mandatory, and you are required to complete it before saving or submitting the form.
-  This icon indicates that the field you are completing is a dropdown list. Clicking this icon will allow you to select the relevant option(s).
-  This icon indicates a date field. Clicking the icon will allow you to select a date from a calendar, or you can simply type the date in using the dd/mm/yyyy format.
-  Any field that shows this icon next to it indicates that there is additional information available to help you complete it correctly. Click the icon to view the additional guidance.
-  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)



Save button

## How to add a new Incident Record (1)

Enter the information for the incident record ensuring all mandatory fields\* are completed. Additional fields will appear to complete depending on your responses.

OFW Community Pharmacy Patient Safety Incident Reporting Form

**Pharmacy Details**

\* Location of Incident When logged in a list will appear to select from – the Demonstration System has some locations in for testing purposes.

Exact location

Branch Number (if applicable)

Reference Number

**Incident Service**

\* Service where incident occurred When logged in services will appear to select from – the Demonstration System has some services in for testing purposes.

**Incident Details**

\* Incident date (dd/mm/yyyy)

\* Time (hh:mm)

Reported Date

22/01/2022

\* Description

Please provide a brief description of the incident ensuring that **no identifiable information** is included in this box. Please **DO NOT** put: Names, Hospital/NHS Number, Date of Birth, Acronyms eg GP, HV, DN, BP

\* Immediate Action Taken

Please provide a brief description of the incident ensuring that **no identifiable information** is included in this box. Please **DO NOT** put: Names, Hospital/NHS Number, Date of Birth, Acronyms eg GP, HV, DN, BP

Enter the information for the incident record ensuring all mandatory fields are completed.

## How to add a new Incident Record (2)

Actual harm is a drop down to select as appropriate.

Actual Harm

If the patient took/used the medicine/medical device, what symptoms did they experience?

### Person Affected

#### Type

Clear section

Contact Role

Person Affected

\* Contact Type

Service User/Relative/Public

Search

### NHS/ID Number

When searching for a patient please use NHS number.  
For all other contacts put a '-' in the number type field

When logged in the Master Patient Index (MPI) will be available to search.

ID Number Type

ID Number



Search

Add more contact numbers

### Person Affected

\* Subtype

\* Forenames

\* Surname

Source Of Record

If the patient/service user sustained an injury a list of injuries will trigger.

\* Was the person injured in the incident?

Add another

## How to add a new Incident Record (3)

**Incident Type**

\* Who was affected?

Patient/Service User

\* Incident Type

Medication, IV Fluids

\* Sub Type

Medication prescribing error

\* Sub Subtype

Incorrect dose/change to dose

The form defaults to medication patient safety incidents for ease, all the codes are available if required to select from the system e.g., patient/service user fall.

The coding spans three levels and will self-populate to the next level depending on the selection.

**Additional Information**

\* Was any equipment involved in the incident?

Was a controlled drug involved?

Yes  
 No  
 Don't Know

\* Are there any documents to be attached to this record?

\* Was any other contact involved in the incident?

Were there other important factors?

Failure in monitoring / assessing medicines therapy

Failure of adequate medicines security (e.g. missing CD)

Failure of clinical assessment equipment

Failure of compliance aid / monitored dosage system (MDS)

Handwritten prescription / chart difficult to read

Healthcare practitioner undertaking supplementary prescribing

Involving a medicine supplied under a Patient Group Direction (PGD)

If Yes is selected an equipment list triggers to search and complete.

Documents can be uploaded on the live system if required.

The important factors are a multi-pick option.

**Openness and Transparency**

Was the patient/appropriate person informed that an incident occurred?

If the actual harm is graded as moderate or above this field is triggered with opportunity to complete details e.g., contact with the patient/service user.

The Duty of Candour Act in Wales comes into force in Spring 2023. The purpose of including this field now (not mandatory) is so colleagues become familiar with it. The Act builds upon current practices of being open.

## How to add a new Incident Record (4)

### Yorkshire Contributory Factors Framework

What were the apparent contributing factors? The form contains all the domains with radio buttons and a triggered free text box when yes is selected.

#### Domain 1: Situational Factors

★ Team Factors: Was there any failure of team function?

For example; Conflicting Team Goals, Poor Delegation, Lack of respect for colleagues, Absence of feedback

- Yes
- No
- Maybe

★ Individual Staff Factors: Were there any reasons this incident was more likely to occur with the particular staff involved?

For example; fatigue, stress, rushed, distraction, inexperience

- Yes
- No
- Maybe

#### Causal Factors Framework Summary

★ Which are the most important contributory factors for this incident?

#### Conclusion

★ Is this incident related to the four harms of Covid 19?

★ Severity of Incident Post Investigation

★ Result

Drop down selection boxes.

Lessons learned

Once saved in a logged in form the report is accessible.

Cancel

Save

## Closing an Incident Record

When the investigation is complete, there are optional additional fields which, when completed will provide feedback to the reporter on closure of the record.

Lessons learned

Feedback to Incident reporter

Information populated in these fields will be included in the email sent to the reporter on closure.

Date Review/Investigation Completed (dd/mm/yyyy)

Person Responsible for Closing the Incident

Once all required fields have been completed, update the Approval Status to 'Closed', this will make the 'Closed' date field visible, once this is populated and saved, the record will be saved in the Closed Approval Status.

**Approval Status**

Current approval status

Management review/Make it safe plus

\* Approval status

Closed
▼

Closed (dd/mm/yyyy)

Please complete fields to close the record

Please save once complete