



Risk User Groups

DatixWeb: April 2026

Agenda

1. Customer Success

2. Product Management

3. Support

4. Solution Advisory

5. Patient Safety Check-In

6. Community Spotlight

7. Customer Success
Masterclass: Actions

8. Q&A

9. Open Discussion



Customer Success

New Customer Success Model

- Previously, we have engaged with customers separately across Workforce, Risk and other RLDatix products leveraged across the NHS
- We are moving to a model of a single Customer Success Manager, responsible for the relationship
- Each CSM is supported by subject matter experts across the team and wider business
- This integration will provide enhanced insight into overall customer health and value delivery.



Customer Success

Key Objectives



Strengthen Long-term Partnerships



Drive Return on Investment



Increase Customer Satisfaction

The Role of Customer Success





Product Management

Agenda

- 1.** Roadmap: 14.6.1 (ETA: late spring) and Beyond
- 2.** OAuth2 Modern authentication for emails
- 3.** DatixWeb Fit for the Future: AWS and DataHub solution

14.6.1 New Features and Enhancements

- Remove the Pop Up Message under the field "Were any patients involved in this event?" when Auto Populated
- Trigger LFPSE contact fields for patients in Person's Affected Form
- Allow Incident records to be saved "in the holding area" without mandatory validation when using level 2 forms
- Global to hide NRLS mapping from Admin
- Correct Scaling of Items on New User Interface
- Risk Matrix zooming options improvement

Accreditation test							
Address (Locations)	Approval status	Assessment period	Assessment priority	Category (Assessment template)	Compliance %	Cycle year	Description (Assessment template)
jkhjgfkujjjj	Open	test		test		test	fjlgJ;N
jkhjgfkujjjj	Open	test		test		test	fgdgg
jkhjgfkujjjj	Submitted	test		test		test	vhgk;JVB
jkhjgfkujjjj	Submitted	test		test		test	jgwg
jkhjgfkujjjj	Submitted	test		test		test	Yelmaji
jkhjgfkujjjj	Submitted	test		test		test	Test Assessment template
jkhjgfkujjjj	Open	test		Category 2		1 of 3	Compliance against key nu
jkhjgfkujjjj	Open	test		test		1 of 3	Test Assessment template
jkhjgfkujjjj	Open	test		test		1 of 3	
jkhjgfkujjjj	Open	test		test		1 of 3	fdfferfrf
jkhjgfkujjjj	Open	test		test		1 of 3	
jkhjgfkujjjj	Open	test		test		1 of 3	abddddddddddddddddd
jkhjgfkujjjj	Open	test		test		1 of 3	Yelmaji
jkhjgfkujjjj	Open	test		test		1 of 3	jcjdbvad v vzm
jkhjgfkujjjj	Open	test		test		1 of 3	

Accreditation test											
Address (Locations)	Approval status	Assessment period	Assessment priority	Category (Assessment template)	Compliance %	Cycle year	Description (Assessment template)	Due date	ID	Initial assessment grade	Location type (Location)
jkhjgfkujjjj	Open	test		test		test	fjlgJ;N		1		Location Type 1
jkhjgfkujjjj	Open	test		test		test	fgdgg		3		Location Type 1
jkhjgfkujjjj	Submitted	test		test		test	vhgk;JVB	22/06/2025	11		Location Type 1
jkhjgfkujjjj	Submitted	test		test		test	jgwg		12		Location Type 1
jkhjgfkujjjj	Submitted	test		test		test	Yelmaji		13		Location Type 1
jkhjgfkujjjj	Submitted	test		test		test	Test Assessment template TEST		29		Location Type 1
jkhjgfkujjjj	Open	test		Category 2		1 of 3	Compliance against key nursing standards		139		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3	Test Assessment template TEST		141		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3			142		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3	fdfferfrf		143		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3			144		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3	abddddddddddddddddd		145		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3	Yelmaji		146		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3	jcjdbvad v vzm		147		Location Type 1
jkhjgfkujjjj	Open	test		test		1 of 3			148		Location Type 1

Bridging the Rich Client gap

DatixWeb

To Do List My Dashboard Actions Contacts Organisations Equipment Distribution Lists Library Hotspots Hotspot Agents Medications Policies Payments Admin Logout

Incidents ▾ Risk Register ▾ PALS ▾ Complaints ▾ Claims ▾ Safety Alerts ▾ Standards ▾ CQC Standards ▾ Accreditation ▾

Text Strings

← Back to admin

Listing records 1 - 40

Module	Field name	Original Label	New Label	Table
inc	<input type="text"/> Clear search	<input type="text"/> Clear search	<input type="text"/> Clear search	<input type="text"/> Clear search
INC	act_loctype	Location (type) (Action Plan)		INCACT
INC	inc_pol_action	Police actions		incidents_main
INC	inc_impact	Impact on person		incidents_main
INC	inc_recomm_code	Recommendations codes		incidents_main
INC	inc_category	Category	Category (INC - relabelled)	incidents_main
INC	link_treatment	Treatment (Persons)		INCPER
INC	inc_subcategory	Sub category		incidents_main
INC	inc_investigator	Investigator	Investigator(s)	incidents_main
INC	inc_eqpt_type	Product type (Equipment)		incidents_main
INC	inc_outcomecode	Outcome code (Equipment)		incidents_main
INC	secgroup	Security group		incidents_main
INC	con_empl_grade	Grade (Persons)		INCPER
INC	imed_type_admin	Type of drug administered (Medications)		INCMED
INC	imed_type_correct	Type of correct drug (Medications)		INCMED
INC	imed_error_stage	Stage at which error occurred (Medications)		INCMED
INC	imed_error_type	Type of error (Medications)		INCMED
INC	link_clin_factors	Clinical factors involved		INCPER
INC	link_direct_indirect	Direct / indirect contact made?		INCPER
INC	link_injury_caused	Was physical injury caused?		INCPER
INC	link_discomfort_caused	Was personal discomfort caused?		INCPER
INC	link_public_disorder	Was there public disorder?		INCPER
INC	link_harassment	Harassment/malicious communications?		INCPER
INC	link_police_pursue	Does the individual want the police to pursue th		INCPER
INC	link_pprop_damaged	Personal property damaged/stolen?		INCPER

- Allow editing of text strings (excluding LFPSE fields)
- Enabling 'group by' option in Crosstab reports
- Ability to search under the complainant chain
- Ability to edit the document type list
- Ability to batch update extra fields

Beyond 14.6.1

Enhancing Reporting capabilities: Introducing the DataHub solution **via the** Data Platform



Finalising the UI refresh – **Admin Areas**



Support LFPSE data validation: Show date of first and last LFPSE submission **on the LFPSE Management page**



Other LFPSE improvements

OAuth2 timeline

Early May 2025

Solution for Modern authentication for emails ready. Following Microsoft's announcement to deprecate Basic auth, Modern authentication configuration is enabled within DatixWeb version 14.4.1.1. Released after nonNHSmail users configuration tested. Customer comms and Marketing Article sent with timelines and deadlines. User Guide for nonNHS.mail users provided. Initial deadline: September 2025, extended to March 2026 by Microsoft.

End of Jan 2026

Customer comms and Marketing Article updated and HNS.mail User Guide provided. Microsoft extends the deadline to end of 2026



May 2025 to January 2026

RLDatix works with an NHS.mail customer and NHS to resolve the configuration conflict for NHS.mail users

Mid March 2026

It is brought to RLDatix attention that NHS will not extend the basic authentication deprecation deadline, despite Microsoft's recommendation. RLDatix sends urgent comms with details about impacted customers

Link to the Article: [DatixWeb 14.4.1.1 | DatixWeb Microsoft Exchange to Modern Authentication](#)

DatixWeb Fit for the Future:

We're continuing to invest in DatixWeb to ensure it remains a product you can rely on today and well into the future.

Link to the article:

[DatixWeb Fit for the Future](#)



We are moving **all our hosted infrastructure** to a more secure, industry-leading cloud platform. We are creating a safer, more resilient, and more scalable experience, supporting you long term. Some of the benefits of AWS include:



Access to the latest technology, ensuring DatixWeb remains modern and future-ready



Enhanced security and continuous innovation



This move ensures a more resilient, secure, and scalable foundation for everything we do.

AWS Migration

Hosted solutions:

RLDatix will contact you via email.
EA subscriptions 1st May 2026



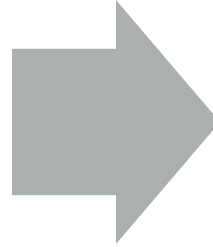
On-prem solutions:

Contact our Sales team to
obtain more details about our
hosting solution

Rich Client Sunset on AWS

Rich Client has not been supported since 2018.

1. No longer meets our current security and compliance standards
2. Cannot be maintained at the level of protection you require.



Retiring Rich Client allows us to

1. Maintain strong security protections
2. Deliver improved and reliable software
3. Continue supporting DatixWeb long-term

RLDatix Support with Rich Client

The RFI and Inquests modules will not be supported during this transition.

Accessing historical Rich Client data:

All Rich Client records (all data and attachments) created in modules available in DatixWeb will be accessible in the corresponding DatixWeb modules.

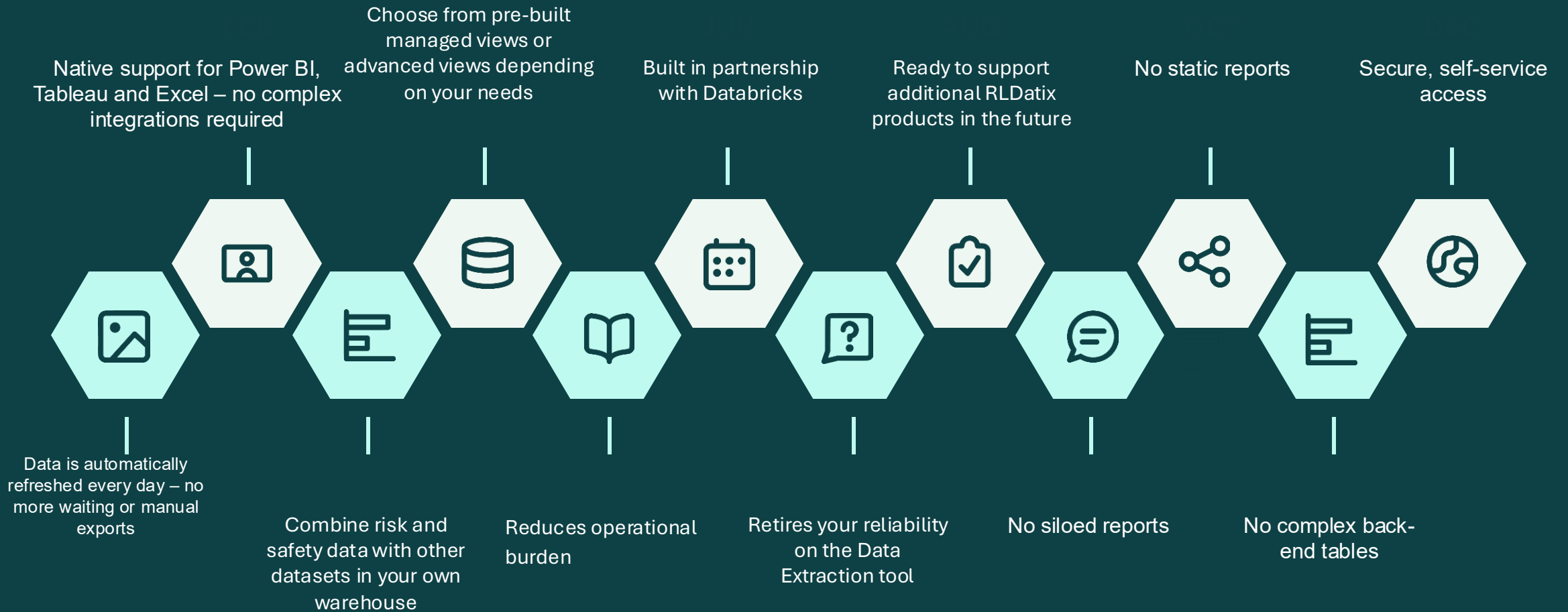
Hosted customers moving from Redcentric to AWS will be provided scripts to extract their historical Inquests and RFI data (records and attachments) prior to the migration.

Our Support team will be providing assistance with the extracts.

On-prem customers will be able to retain Rich Client on one of the Servers for accessing historical records

Please contact our Support team if you need any assistance accessing Inquests and RFI data during the migration.

Datahub Solution Powered by our new RLDatix Data Platform





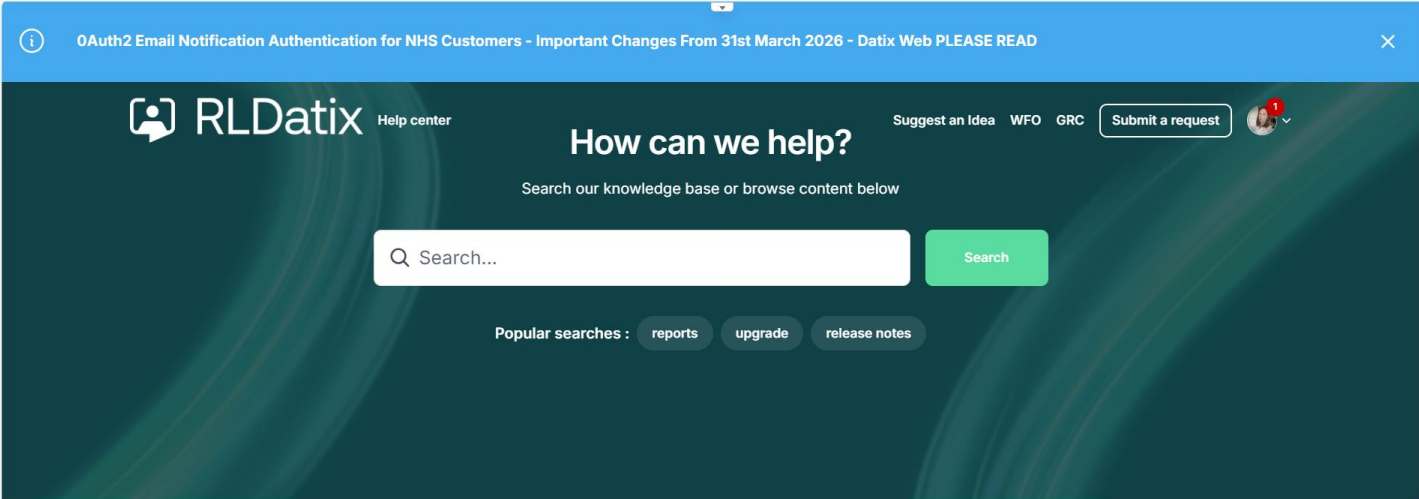
Support

Customer Portal Theme Upgrade

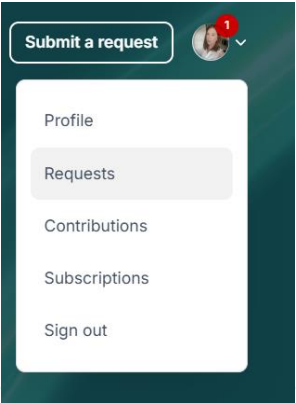
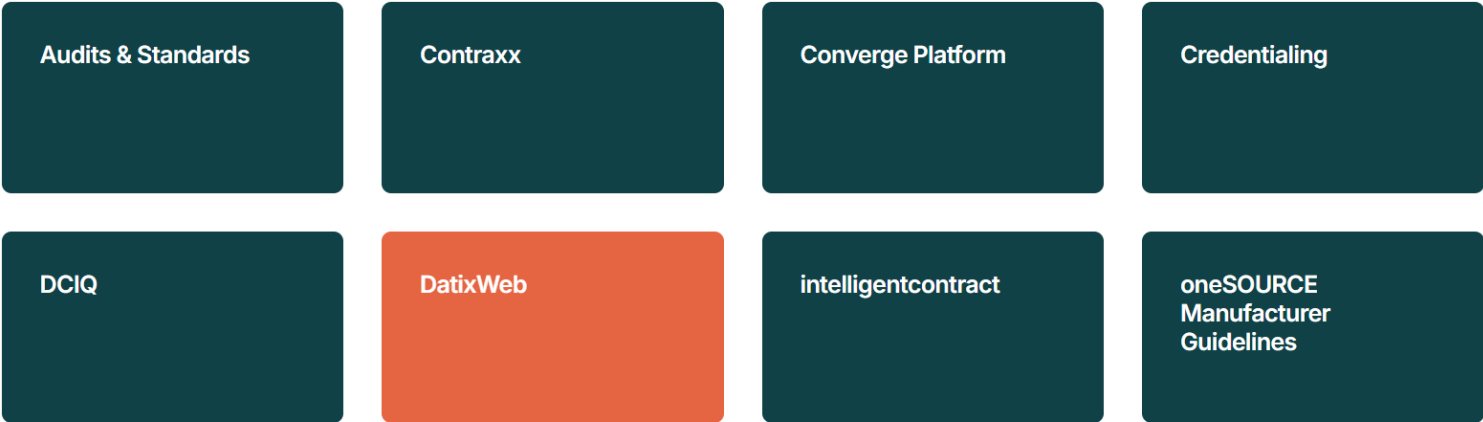
New Customer Portal theme has been implemented. Users can now browse the Knowledge Base by Product, making it easier and quicker to find relevant information.

Handy Tip:

To view current tickets with support you need to click on your profile icon and then Requests.



Browse our knowledge base



Customer Portal Theme Upgrade

A major enhancement has been added to the Customer Portal. You can now view the development status for your open cases that are logged with the Development.

What does this mean for you?

- Improved Visibility of the development lifecycle for your cases
- Easier tracking of progress

How to view the Development Status

1. Open your support ticket
2. Scroll down the page
3. On the right-hand side tool bar, you will see:
 1. Development ID
 2. Development Status
 3. Development scheduled for Release

What is the impact of this request?

Significant: A large number of users are affected and are acutely disadvantaged in some way.

What is the urgency of this request?

High: Work that cannot be completed by users is highly time sensitive.

Development ID

328004

Development Status

Development on this work items has been completed and it is released to production

Development Scheduled for Release

14.5.0.2

Support Operations Key Initiatives

Reintroduction of Proactive Outreach - As part of our ongoing commitment to improving the customer support experience, we are proactively reaching out to customer with open support cases to arrange a one-off review call.

Purpose of the call

- Review current Support Cases
- Confirm Priorities
- Identify opportunities to progress escalate, or close tickets that are no longer causing issues.

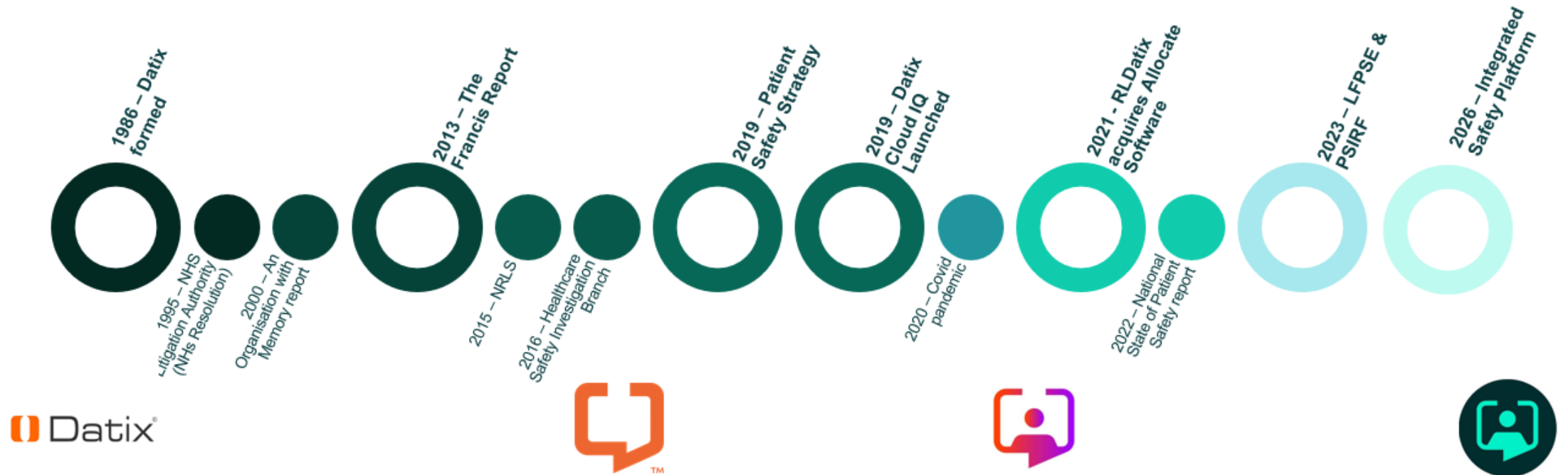
Positive Early Feedback

This initiative has already received positive feedback following the first round of review meetings, with customers valuing the clarity and momentum it provided



Solution Advisory

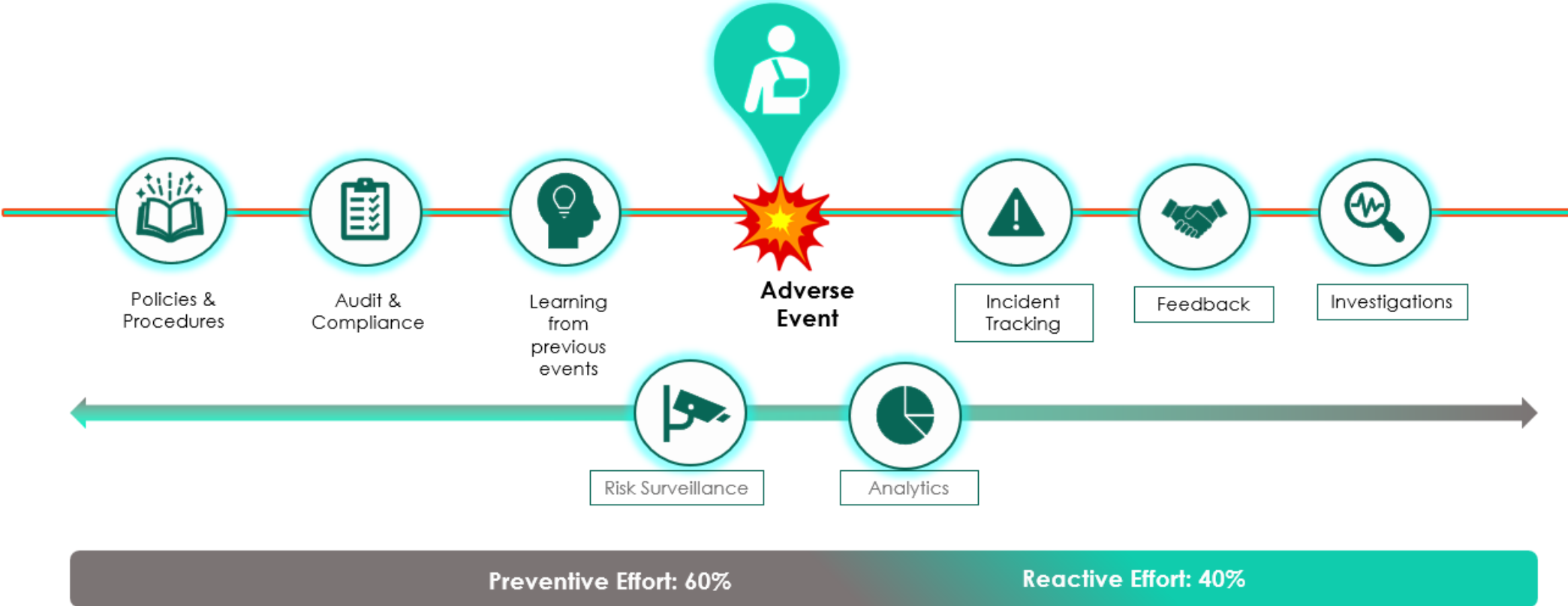
Who are RLDatix in the Safety World Today?



Integrated Safety Platform

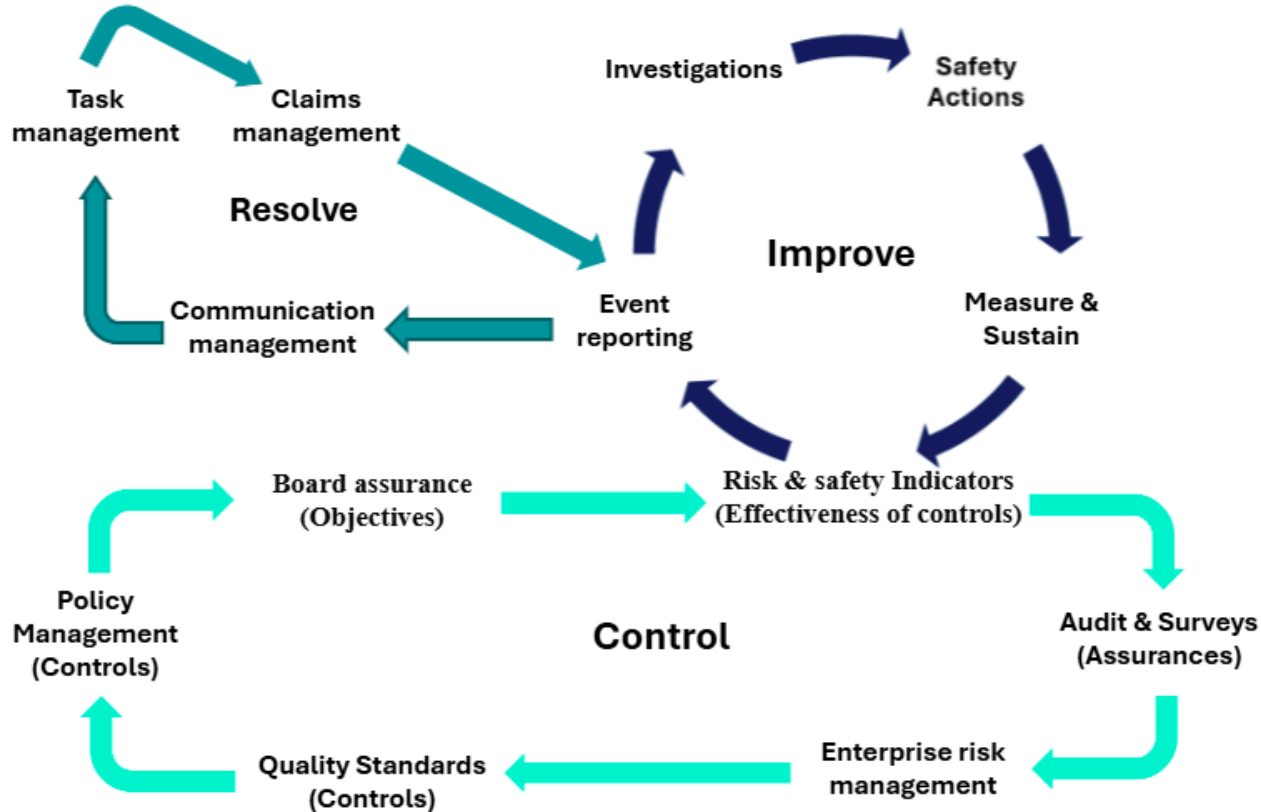


RLD Approach: A Single View of Risk, Safety & Compliance



Control, Resolve, Improve – A Proactive approach ...

The safety platform provides Organisations with a holistic view which enables a proactive approach to risk and safety to improve outcomes for patients and safety of staff.

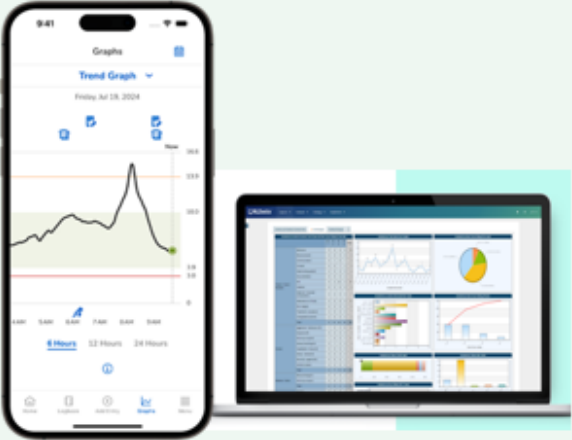


Insights for Oversight & targeted action – 3 tiers

Dashboards, trend analysis tools and board-level reporting provide a clear view of patient safety performance, emerging risks and areas needing attention, supporting informed operational and strategic decision making

For Operational Control: System Reporting

Easily accessible for administrators and specialists



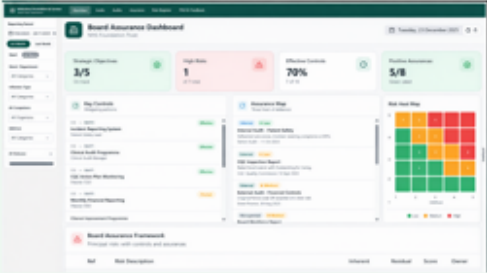
For Organisational Knowledge: Data Hub – BI Plug & Play

Full access of data for Business Intelligence and Data Analysts Team

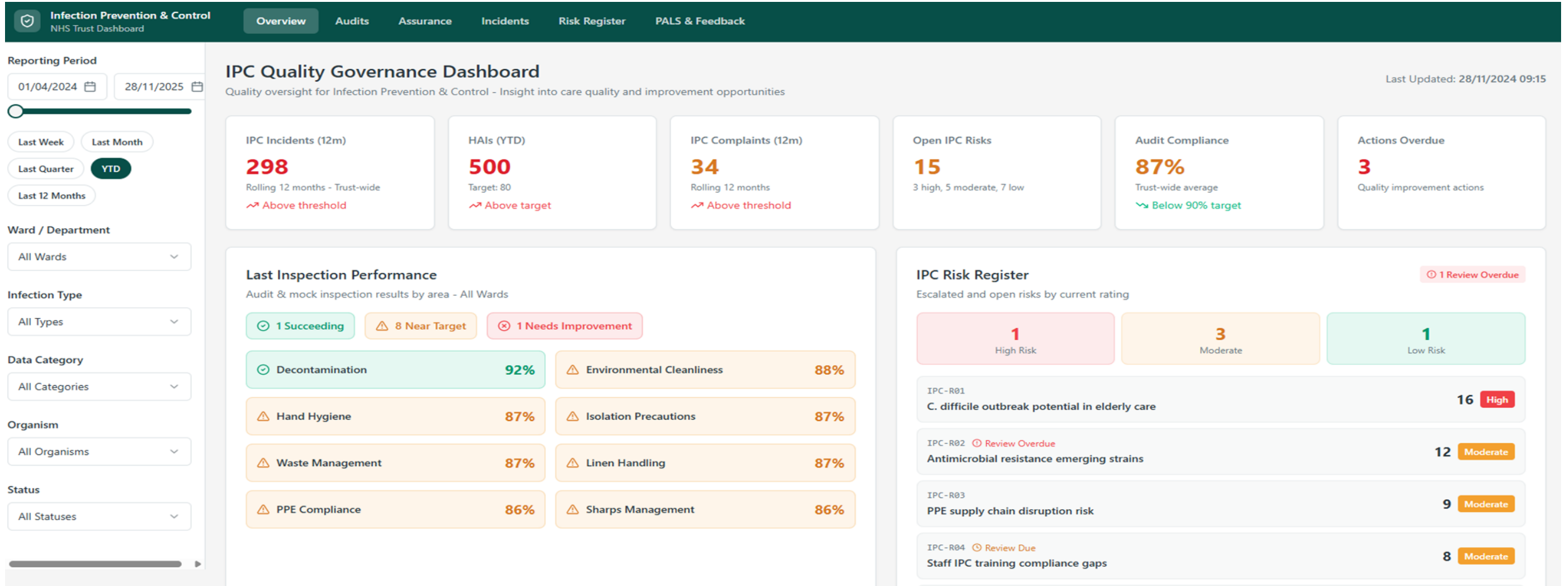


For Assurance & Oversight: RLD Intelligence

Pre-curated dashboards enabling single truth assurance and oversight



Example Dashboards



Indications Prevention & Control
NHS Foundation Trust

Overview Audits Assurance Risk Register PRAs & Feedback

Reporting Period
100/2025 - 28/11/2025

Last Month Last Month

Ward / Department
All Categories

Infection Type
All Categories

All Corporations
All Organisms

Aditines
All Categories

All Statuses

Board Assurance Dashboard

NHS Foundation Trust

Tuesday, 23 December 2025

Strategic Objectives

3/5

On track

High Risks

1

of 7 total

Effective Controls

70%

7 of 10

Positive Assurances

5/8

Green rated

Key Controls

Mitigating actions

- CIS — BAF3
Incident Reporting System
Patient Safety Lead Effective
- CIS — BAF1
Clinical Audit Programme
Clinical Audit Manager Effective
- CIS — BAF1
CQC Action Plan Monitoring
Deputy CQO Effective
- CIS — BAF2
Monthly Financial Reporting
Deputy CGO Partial
- Citenaal Improvement Programme

Assurance Map

Trees tree of evidence

- Internal • Low
Internal Audit - Patient Safety
Safeacted amureuse, imrcivser reseriting compliance at 85%.
Senior Audit - 11 Oct 2025
- External • Low
CQC Inspection Report
Rated Good overall with Outstanding for Caring.
CQC Quality Commission 15 Sept 2025
- External • Medium
External Audit - Financial Controls
Original fence audd Qif eorpoted ann cleen tsik.
Greet Finance. 29 Aug 2025
- Manapemed • Medium
Board Workforce Report

Risk Heat Map

Legend: Low (Green), Medium (Yellow), High (Red)

Board Assurance Framework

Principal risks with controls and assurances

Ref	Risk Description	Inherent	Residual	Score	Owner
S01	Deliver Outstanding Patient Care <small>Clinical Standards</small>				
	Refines Cofilee incidence				
	Comraty kespreadalities onlie: 163 ancltencer residence				

mer Desoprte

Future Planning - Organisation Appetite?

Executive & Board Ownership

Engaged and committed to improving patient outcomes

Regulation & Assurance

Desire for continuous inspection readiness

Evidence-based assurance

Appetite for Integrated Insight

Interest in themes, trends, and emerging risks rather than static reports to look at



Learning, Improvement & Prevention Mindset

The organisation is ready to move from reactive to proactive safety management to lead to measurable improvement

Governance Foundations

Existing well embedded governance procedures and pathways within the central governance team and wider committees however the Organisation is looking to strengthen and connect this further

Culture

“Safety is everyone’s responsibility”

Committed to learning and improvement to support a proactive culture to risk

Digital & Change Readiness

Comfortable with cloud-based platforms and standardised processes

Acknowledgement that process and behavior change may be required

Capacity identified for successful adoption

Customer References & Case Studies





Patient Safety Check-In

LFPSE & DatixWeb

Version 14.3.6 and above supports external reporting

Version 14.5.0.2 and above supports V6 Taxonomy

V5 Taxonomy does remain compliant

V6 Taxonomy in DatixWeb includes the ability to withdraw records from LFPSE in DatixWeb

DatixWeb supports the reporting of Incidents, Good Care, Outcome and Risks to LFPSE

The LFPSE Reference section in DatixWeb supports Organisations in incorporating LFPSE submission reviews at Incident Management level

Common Errors & Troubleshooting

Error	Fix
'this organisation is unauthorised to upload V6 taxonomy data'	Contact NHSE ahead of going live with V6 to ensure your ODS code is approved for submissions
"A value for 'PhysicalHarm' is required for Incident submissions" OR FhirOperationException: A value for 'PhysicalHarm' on Contained.Patient.patient-details is required for Incident submissions	Complete the LFPSE Harm fields
"The extension 'adverseevent-agent' is required for Incident submissions" / "A value for 'InvolvedAgents' on extension 'adverse-eventagent' is required for Incident submissions"	When submitting an incident, it is mandatory to complete the question "Which things were involved in what went wrong?"
Submission must contain PSIRFResponse to include other PSIRF governance questions under the extension 'adverse-event-psirf'	Please be aware that no PSIRF fields will trigger unless 'is there a national or regulatory requirement to conduct an investigation in response to this event?' is populated with 'yes'.

Common Warnings & Troubleshooting

Error	Fix
"Organisation is not included in submission"	ODS MAPPING, including the external reporting field
"ReporterOrganisation not included in submission"	ODS MAPPING, your own internal location field
"AgeAtTimeOfIncidentDays was not included in the submission"	The age is calculated from Incident Date and the Date of Birth of the patient. Check that the Date of Birth is completed against the person affected for the incident.
"AgentsInvolved indicates people's actions were involved in this submission but no people action details were found"	If LFPSE field "Which things were involved in what went wrong?" is answered as "None of the above" a new section will appear LFPSE – Involved Persons.

PSIRF & DatixWeb

The PSIRF fields are available in DatixWeb from Versions 14.3.6

The PSIRF fields have API capability in DatixWeb from 14.5.0.2 onwards

'Which Incident framework are you reporting under?' Can be defaulted and hidden in form design

The PSIRF section can be made read only, and can appear in its own new panel

We understand each Organisation has its own PSIRP, which can be added in form design

Patient Safety Forum 2026: Snapshot

Creating a safer healthcare system by embedding patient safety in delivery

Ted Baker emphasised that the words we use shape patient safety culture. PSIRF is about curiosity and embracing complexity, build the right culture first, then the framework.

Tim James noted digital can reduce harm, but only if co-designed, inclusive, and well-regulated. It can just as easily increase cognitive load if not done right.

Professor Bole Owolabi CBE highlighted that many safety issues arise between care settings, worsened by poor system interoperability.

The panel agreed incident reporting is vital, but the focus must shift toward identifying and preventing risks before harm occurs.



Community Spotlight

Birmingham Community Healthcare NHS FT

DatixWeb: From Ward to Board

- **Strong reporting culture sustained through change** - BCHC maintained high incident reporting levels during major DatixWeb, taxonomy, and national framework transitions, reflecting psychological safety and staff confidence.
 - **How?** - Videos, Drop-In sessions, Risk days, **being excited about driving Patient Safety from cure to prevention**
 - **Better data quality through structured reporting** - Redesigned Datix forms with mandatory, coded fields replaced free text, enabling clearer insights, earlier trend detection, and identification of inequalities in care.
 - **How?** - Adopting every feature and function, **understanding you get out, what you put in**
 - **Faster learning and action at divisional level** - Live Datix dashboards replaced manual spreadsheets, cutting response times from weeks to days and embedding accountability through visible, tracked actions.
 - **How?** - Intuitive report configuration, using saved queries (rolling 180 days, or 365 days) & using actions at every level
- **Real-time board-level assurance** - Executives now access live safety data aligned to governance agendas, driving timely decisions, reducing overdue risks, and increasing ownership across operational leaders.
 - **How?** - Reports & Dashboards



Would you like to take part in a RLDatix Customer Success Story?

We want to shout about the fantastic work you are doing to improve Patient Safety outcomes

Contact hannah.dalziel@rldatix.com

Connected Health & Care Summit 2026

9th -10th July 2026

International Way,
Telford, Shropshire,
TF3 4JH

Interested in sharing your story? We are looking for presenters to discuss:

- Real-world stories
- Top tips & tricks using Datix
- Tangible outcomes and lessons learned
- How RLDatix supports operational or strategic goals

[Home - Connected Health & Care Summit 2026 | UK&I](#)





Actions Masterclass

Module Overview

Purpose

- Issues are followed up
- Responsibilities are clearly assigned
- Progress is tracked and evidenced
- Nothing is missed
- Actions provide a real time tracking system

Benefits

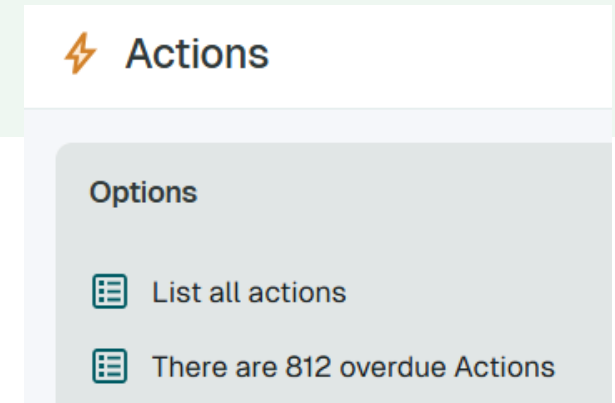
- Improves accountability and ownership
- Supports regulatory compliance
- Enhances patient safety and quality improvement
- Cross-system traceability

Key Components

- Actions can auto-create via Action Chains
- Actions can be assigned to individual users, or teams
- Owners of actions can receive notifications

Workflow Example

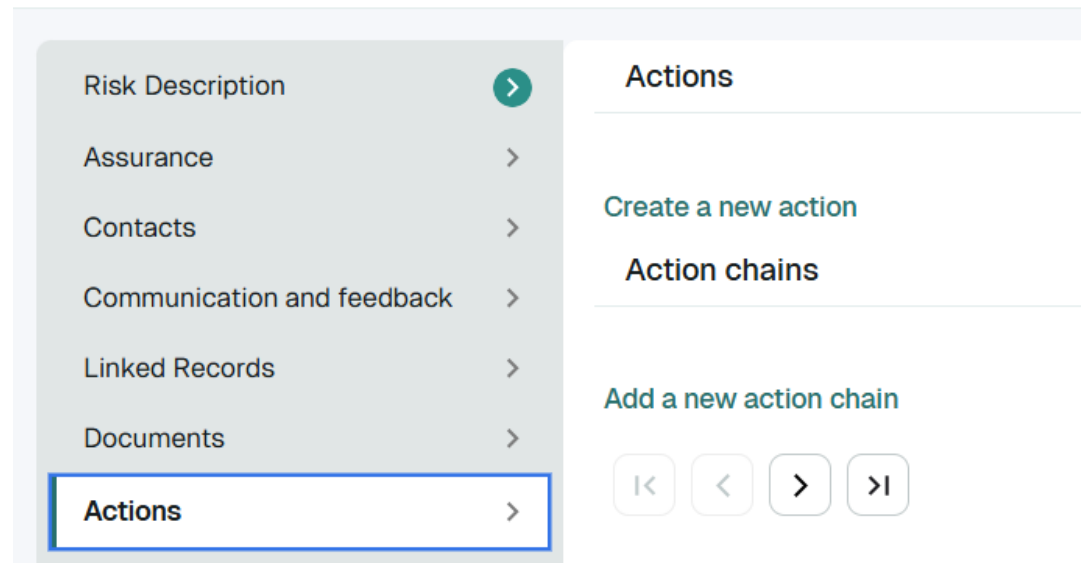
1. Incident logged (for example, patient fall)
2. Investigation finds improvements are needed, Risk logged
3. Action created: 'review falls risk assessment process'
4. Assigned to ward manager
5. Due in 2 weeks
6. Progress updated
7. Completed and reviewed
8. Closed with evidence



⚡ Actions

Options

- List all actions
- There are 812 overdue Actions



Risk Description >

Assurance >

Contacts >

Communication and feedback >

Linked Records >

Documents >

Actions >

Actions

Create a new action

Action chains

Add a new action chain

⏪ ⏩ ⏴ ⏵

Customer Success Best Practice

Monitor deadlines

Ensure there are progress notes in your Action form design

Ensure there is a place for users to capture reasoning for missing any deadlines

Once the task is finished, add the final outcome, supporting evidence and mark the status complete, closing the loop

Understand context by reviewing the linked record to support users in fully addressing the issue

Use reports and dashboards, highlighting overdue Actions, & Actions by Team

Actions as a Patient Safety Driver

Birmingham Community Healthcare NHS FT: Community Spotlight

- **Actions are embedded directly within incident records**, ensuring that learning and follow-up activity is clearly linked to the patient safety event from the outset.
- **Actions feed automatically into live DatixWeb dashboards**, replacing manual tracking and giving ward, divisional, and executive teams immediate visibility of progress.
- **All actions are routinely reviewed via live dashboards during Safety Huddles**, enabling timely discussion, escalation, and support rather than retrospective governance.
- **Named ownership and clear timescales** for actions create shared accountability, with overdue actions remaining visible until completed.
- **Visibility of actions actively drives behavioral change**, with teams arriving at meetings already aware of their outstanding actions and prepared to discuss learning and next steps.

Actions as a Patient Safety Driver

Birmingham Community Healthcare NHS FT: Community Spotlight

- **Actions cannot be hidden or deprioritised**, as outstanding and overdue actions remain visible on dashboards, encouraging resolution and reducing backlog.
- **The use of actions supports safety culture**, where follow-up activity is expected, transparent, and focused on system learning rather than individual blame.
- **Executive teams access real-time action status directly**, allowing senior leaders to interrogate current risks and intervene promptly where actions are delayed.
- **Improved action visibility has contributed to measurable governance improvements**, including a substantial reduction in overdue risks across the organisation.
- **Actions form a core part of BCHC's PSIRF-aligned learning model**, ensuring that learning is not just identified but demonstrably acted upon and monitored.

Resources: Actions

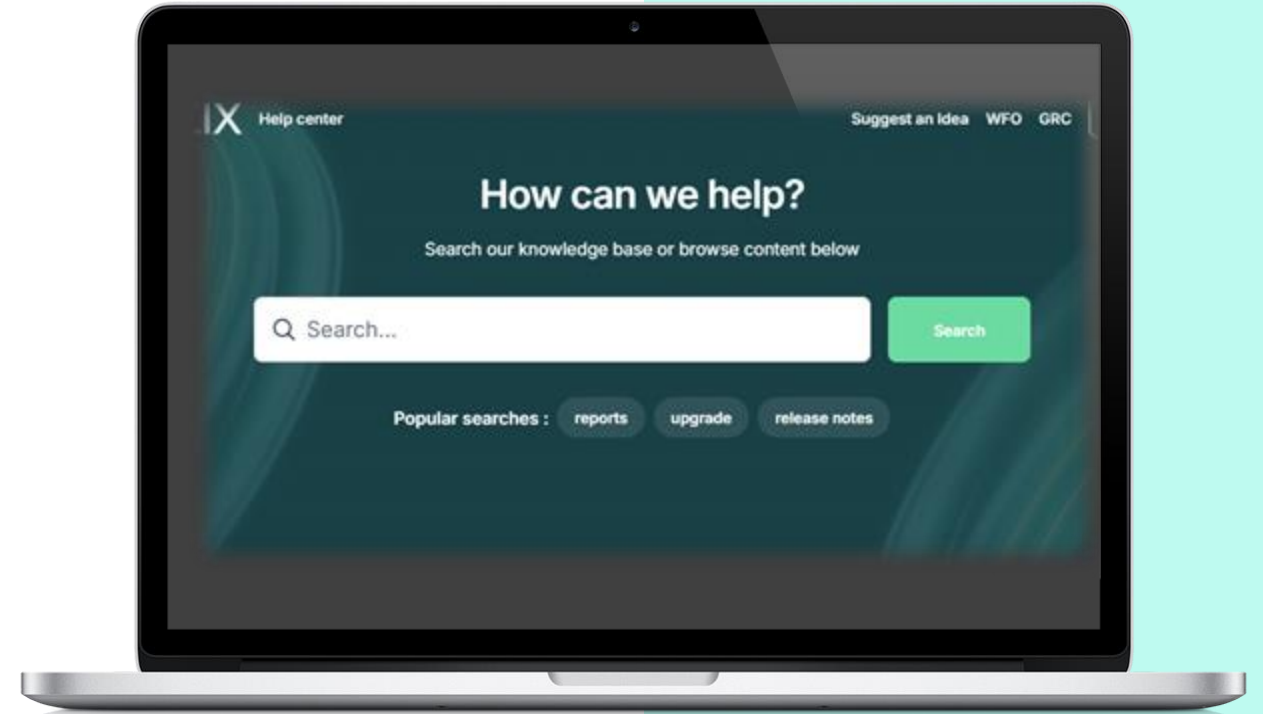
[What you need to know to configure Actions forms on DatixWeb – Governance, Risk & Compliance](#)

[Knowledge Base Video : Action Chains – Governance, Risk & Compliance](#)

[How To Delete an Action – Governance, Risk & Compliance](#)

[How Can We Email Users When An Action Is Created Or Updated? – Governance, Risk & Compliance](#)

DatixWeb > Admin > Help > Actions





Q&A

Open Discussion

Resources

Catch up on all our Webinars and User Groups here: [2026 Risk User Groups | Resource Hub](#)

[Raising a ticket, an Idea & viewing our LFPSE Content:](#)

[LFPSE User Guides – Governance, Risk & Compliance](#)

[Submit a request – Governance, Risk & Compliance](#)

[New idea | RLDatix Ideas Portal](#)

