

RLDatix

# Risk User Group



# **Distribution**

**These slides contain commercially sensitive information and is not for onward distribution outside of your organisation without the prior approval from RLDatix.**

**Thank you for your understanding.**

# Risk User Group - Agenda

Item	Speaker
Product Update – LFPSE update	Olga Chalupczak, <i>Product Manager</i> Amanda Williams, <i>Patient Safety Reporting Lead and User Researcher</i>
Product Roadmap (DCIQ & Dweb)	Olga Chalupczak, <i>Product Manager</i> Alex Smith, <i>Product Manager</i>
Customer Success Masterclass	Hannah Dalziel Customer Success Manager
Support update	Rachel Brown Service Desk Team Leader
Open Discussion & Close	



# **LFPSE update & product roadmaps**

# V6 LFPSE Taxonomy Upgrade

## V6 LFPSE Timeline:

**DatixWeb**

**Summer (July)**

**DCIQ**

**Autumn**



### DCIQ

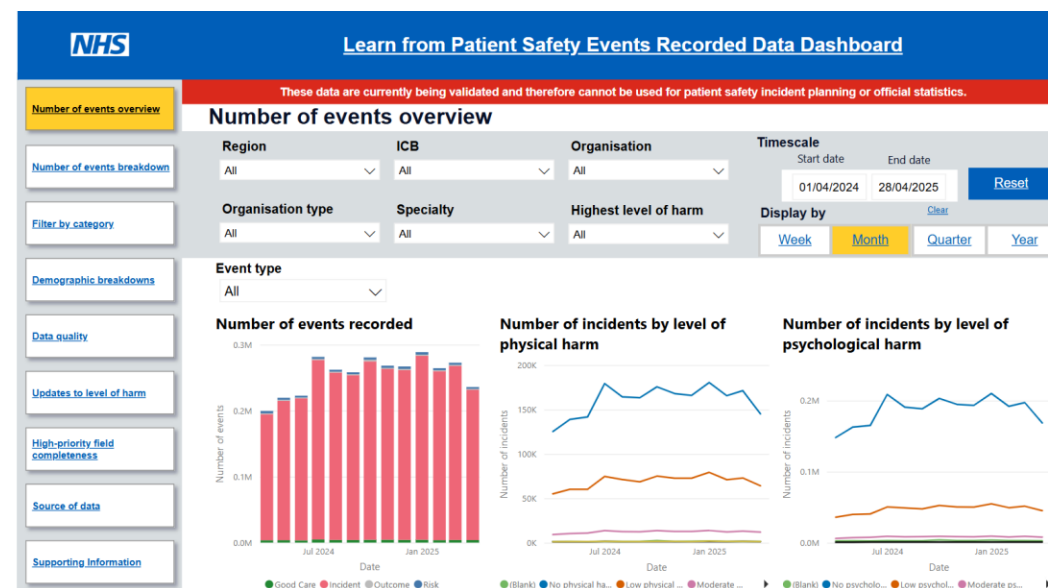
The V6 upgrade has been reprioritized in response to customer feedback, allowing us to focus more on addressing the bug backlog and advancing our technical roadmap to enhance the overall quality of DCIQ.

# Recorded Data Dashboard (RDD) Validation

## Reviewing and validating your local data with LFPSE

### NHSE

- Organisation-level LFPSE data reports will commence publications in May 2025 - national stats and the Recorded Data Dashboard (RDD)
- The extent of your data validation work is determined by you/your organisation.
- Top Tips:
  - ✓ Please review the LFPSE Local Data Validation guide and Introductory video prior
  - ✓ Choose a small snapshot of data to review (1-2 days) from 2024
  - ✓ Select 'Organisation Type' prior to finding your organisation on the RDD
  - ✓ The date within LFPSE is 'successfully submitted to LFPSE' date rather than the local 'created date'



# RDD Validation

## Understanding reasons for discrepancies

We have been working with several customers to understand the reasons resulting in discrepancies between the number of patient safety events recorded in DCIQ/DatixWeb vs RDD

### Reasons for discrepancy

- When editing the LFPSE contact questions, users must save the contact and the incident record for it to be resubmitted.
  - *We are looking at improving the functionality so that resubmissions occur once the contact has been saved*
- Some reporters state that there were no patients involved in an incident, when there were.
  - *As part of V6 we will allow enable auto population of the “were patients involved in the event”*
- Some reporter say that the incident does not affect patient safety, so they bypass the LFPSE questions.
- LFPSE triggered in the “Being Reviewed” Status
- Recorded date discrepancy

# LFPSE Bugs

Bugs that would result in inconsistency in LFPSE data visible in DCIQ/Dweb and RDD

## DatixWeb

Ref number	Bug Description	Found in	Resolved in
254550	Potential duplication of LFPSE reference due to resubmission of records moving between the status of <i>Accepted&gt;Not Accepted&gt;Accepted</i>	14.3.5.1	14.4.1
194051	If LFPSE is triggered when the record is in the “Being Reviewed” status and the field “What kind of event do you want to record?” is left blank following the record being saved, the incident will be labelled as Good Care event.	14.3.4.1	14.4.0
180449	Age at the time of incident is being reported to NHSE 1 year out.	14.3.5.1	14.3.5.3

## DCIQ

Ref number	Bug Description	Found in	Resolved in
249088	<i>When the physical harm level is adjusted from non-fatal to Fatal, the record is not accepted.</i>	DCIQ.2024.R 4.3	TBC

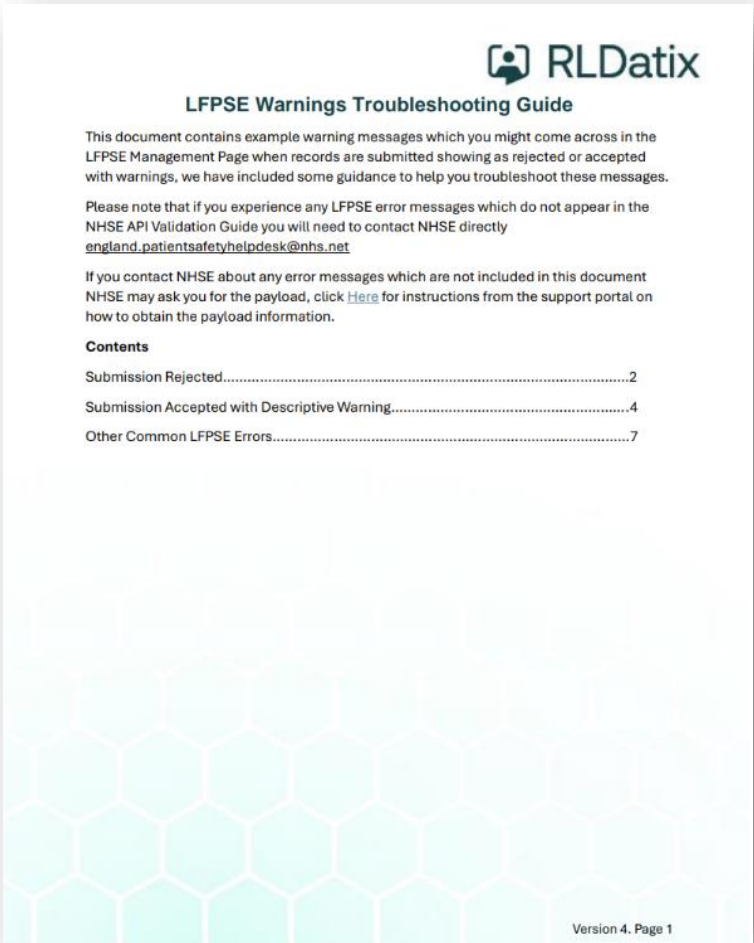
# LFPSE Error and Warning Messages

## How to manage error and warning messages

### RLD

With each version of the taxonomy, NHSE shares with us the API Validation Guide which provides a list of responses users can receive when submitting a record. Based on this document we've created the LFPSE Warning Troubleshooting Guide which is available on the portal.

Where possible, we have introduced logic to prevent the errors from reaching users. However, there are instances where these errors cannot be prevented.



# LFPSE Error and Warning Messages

We are reviewing errors that are not explained in the LFPSE Warning Troubleshooting Guide

## Errors under investigation

- Instance failed constraint ext-1 "Must have either extensions or value[x], not both"
- FhirOperationException: An error has occurred when validating HL7.Fhir.Model.AdverseEvent.

These errors are currently scheduled to be investigated in Q1.

## NHSE

### Not Accepted (LFPSE Error)

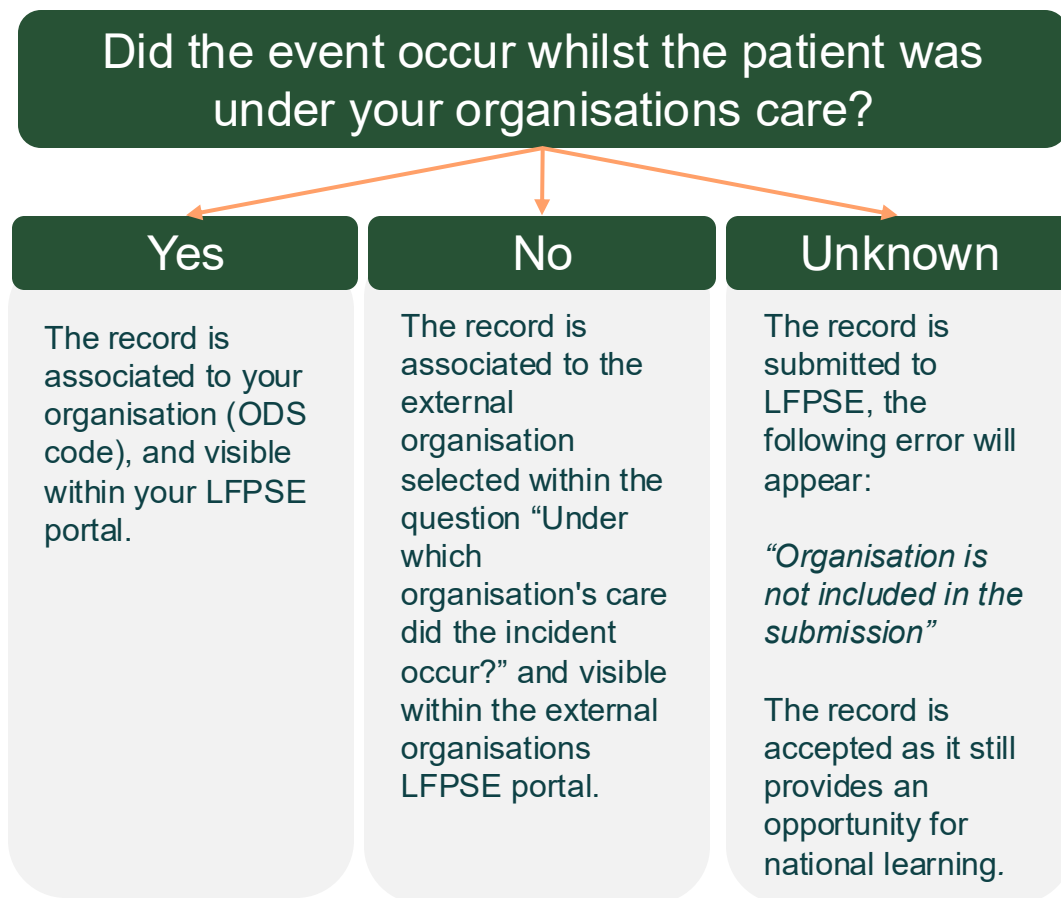
- the LFPSE service is not available – outages recorded on Futures
- there is a fault with the formatting of the record – report to RLD and where possible provide the xml/json file – these should be reduced during the development/testing phase in the future

### Accepted with Warning

- Warnings – these are potential DQ messages to assist the user/organisation - the records are accepted

# Reporting Events for External Organisations

## How does it work?



# Reporting Events for External Organisations

## Implementation & Future Improvements

### RLD

- As part of the V6 release we will be making the following question mandatory *“Did the event occur whilst the patient was under your organisations care?”* in **DCIQ**
- *Future consideration for bringing in list of all organisation & ODS code from LFPSE*
- *Guide for Dweb on importing ODS codes*

### NHSE

How you record external events is up to you and your surrounding organisations:

- You can record them into your LRMS and assign them to the external organisation (and inform the external organisation of the identifiers), or
- Record them locally using ‘Unknown’ and share the case with the external organisation for them to record into LFPSE under their own organisation

Potential future enhancements being discussed:

- ‘Push’ records into the external LRMS as a draft for them to accept/decline
- ? Have an identifier (e.g. NHS Number)

# Where externally recorded events are not identifiable

## PSIRF statement

*“The LFPSE is a national learning tool for patient safety, so is required to contain anonymous information only. We appreciate that in a small number of cases you may not be able to identify the patient/s involved easily and our advice in this situation is to attempt to identify the case if possible (i.e. look at the date of the incident, the service areas and specialties involved). Where this is not possible, you should consider the incident in line with your patient safety incident response plan to help inform the type of response that might be needed. If you are satisfied that risks are being managed appropriately or that there is improvement work underway, then a learning response may not be required. If the incident highlights an opportunity for new insight/learning, it may be helpful to use more prospective methods, for example, tools for exploring every day work, see [NHS England » Patient safety learning response toolkit](#) for further information. You can also use the record as part of your data review to inform the development of your patient safety incident response plan”*

## Supporting customers with good care reporting

### RLD

- Since becoming V5 compliant our goal has been to improve the integration of the LFPSE taxonomy into forms, improve users experience and reduce impact on the incident reporting culture.
- Once we are compliant with V6 we will be working on improvements to support our customers with reporting of good care events for example a new notification template for good care reporting.
- Please note in the V5 taxonomy there is an error whereby the following warning message appears when submitting good care events "AdverseEvent.Date is not included in the submission". NHSE have corrected this in V6, the Date field will be required as part of V6.

#### DatixWeb:

- We will be updating the wording of the following question by replacing 'incident' with 'event' to ensure it also applies to good care events: 'Did the incident occur while the patient was under your organisation's care?'"

### NHSE

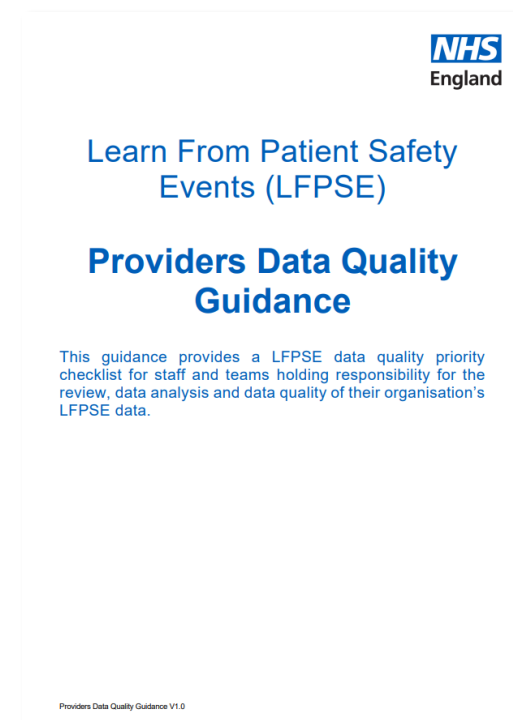
- The recording of Good Care events was new LFPSE
- There will be further enhancements on this event type once reviewed
- In 2025 the LFPSE team will be working on a new 'sharing and learning collaboration platform' where organisations can start to gain information and knowledge from the LFPSE data

# Future LFPSE work

## Development enhancements and project delivery

### NHSE

- Patient and public reporting – Alpha phase
- Sharing, learning and collaboration platform – user research and Discovery phase
- Recorded Data Dashboard enhancements:
  - Logged in area for data downloads
  - Machine learning outputs
  - Improvements based off feedback
- Online patient safety event recording enhancements:
  - Veneers for different sectors
  - Slicker form design
  - Improved ICB/regional access to data
- Data Quality:
  - Official statistic reports
  - Internal data quality dashboard
  - Taxonomy review
  - Providers Data Quality Guidance support





# **Customer Success Masterclass**

# Customer Success – Current Position and Masterclass Intro

- 1-1 Sessions providing tailored support developing collaborative action plans to align our solutions with Organisational objectives
- Streamlining forms and optimising systems whilst ensuring compliance
- Specialised content for Administrators focusing on the **how and the why**
- Team of 4 CSM's working across DatixWeb and DCIQ to help Organisations get the most out of our systems
- Focused on being the **voice of the customer**
- **Today's masterclass was formed because of customer insight! Tags are an often-underused feature but can provide an extra layer of insight to the data you capture**



# Using Tags for Thematic Trend Analysis

## Why?

Tags in DatixWeb and DCIQ are not just labels, they are a strategic grouping of data allowing us to make sense of large volumes of submissions

Effective tagging transforms learning data into actionable insight, allowing us to analyse trends across departments, roles or compliance

Tagging introduces an Organisation-specific way of tracking how key themes are being addressed

Tags give us an evidence-based foundation for continuous improvement in both compliance and culture

Tags can allow us to break out of siloed metrics, we can trace the lifecycle of themes

The screenshot shows a 'Coding' section with several dropdown menus. The 'Sub category' dropdown is open, displaying 'Patient Safety' as the selected option. The other dropdowns are closed.

Coding	
Type	<input type="text"/>
Tags: Test	<input type="text"/>
Tags: Category vs Type	<input type="text"/>
Category	<input type="text"/>
Tags: Category vs Type	<input type="text"/>
Sub category	<input type="text" value="Patient Safety"/>

# Using Tags for Thematic Trend Analysis: How


- *This is the same process in both DatixWeb and DCIQ*
- Tags are configured in Admin > Custom Settings > Tags Set Up
- Tag Set Up > New Tag Set
- Add name and description, for example: Name = Category & Type
- Description = (for example) Category tags for thematic trend
- 'List of tags' – now, add your tag, for example: patient safety
- Once completed, now go to Admin > Assign Tags > *this is where we associate the tag with the module and the field*
- Hit 'Edit' next to the appropriate code and assign your tag!
- **This is then automatically added to your search form; under the field you have selected in Tag Set Up**

[How to enable Tags in DatixWeb – Governance, Risk & Compliance](#)

[How to set up and add tags – Governance, Risk & Compliance](#)

Incidents ▾Risk Register ▾Experience and Feedback ▾Complaints ▾Claims ▾Safety Alerts ▾Accreditation ▾


Datix Consultant Timeout: -1

Assign tags

Back to admin


Field	Module
Category	Incidents
Type	Incidents
Unit	Incidents

DatixWeb 14.3.6 © RLDatix 2023





Incidents ▾Risk Register ▾Experience and Feedback ▾Complaints ▾Claims ▾Safety Alerts ▾Accreditation ▾

Datix Consultant Timeout: -

Assign tags (Category)

Back to admin

Code	Category vs Type	
Accident	Patient Safety	[edit]
Blood	<div><div> </div><div></div></div>	
Quality of Care	Patient Safety	[edit]
DVT		[edit]
Estates Issue		[edit]
Falls	Patient Safety	[edit]

# Customer Success: Tags – Recommendations

## Patient safety - why?

Actionable Trends: Grouping data under this tag allows you to track:

- Engagement: How many employees are engaging with patient safety training.
- Trends over time: Are there increases or decreases in training on this theme? Are there specific months or seasons when training on patient safety spikes?
- Skill gaps: Are there specific areas (e.g., medication safety, infection control) where more focused training is needed based on trends in tag usage?
- Compliance monitoring: Are specific departments or teams falling behind in required training related to patient safety, which could indicate compliance risks?

# Customer Success: Tags – Recommendations

- Tags like “Communication Skills,” “Conflict Resolution,” or “Emotional Intelligence” can help break down leadership themes even further, giving a clear picture of which leadership competencies are being developed or need additional focus.
- Tags like “Data Privacy,” “Workplace Safety,” “Anti-Harassment,” or “Regulatory Updates” can allow for more granular analysis of specific

compliance topics and their impact on training trends.

- Searching using your tags will present your results in a listing page as expected, this can then be saved as a query to make the data easily accessible
- The query can then be used to run reports!

The screenshot displays the 'Report designer - Incidents' interface. At the top, there are navigation tabs: 'Incidents', 'Risk Register', 'Experience and Feedback', and 'Complaints'. Below the tabs, the title 'Report designer - Incidents' is shown with a warning icon. The 'Report type' section features a grid of ten chart icons: a bar chart, a pie chart, a line chart, a stacked bar chart, a line chart with a trend line, a grid, a table, a gauge, and a rainbow bar chart. The 'Report settings' section includes a 'Custom title' text box, a 'Query' dropdown menu set to 'TAGS TEST', and two field configuration sections. 'Field 1' has a 'Form' dropdown and a 'Field label' dropdown. 'Field 2' has a 'Form' dropdown and a 'Field label' dropdown.

# Benefits of Tags - Customer Success Story

Jennie Ahronson in her time at SLaM (prior to joining RLDatix) added a tagged field to enable searching for incidents on all inpatient areas, outpatient areas and community patient areas along with a second tag for male wards and female wards.

*This was done via tagging the most drilled down location, in Jennie's instance this was the specialty field, male and female tags were added and then the relevant wards associated with the correct tag. Any new wards would need to be added in 'assign tags' > we'd recommend scheduling a 6 monthly review for tags*

Prior to this, users would need to manually go through the ward list to know which wards fell under which category – tags transformed this into a simple exercise





[customersuccess@rldatix.com](mailto:customersuccess@rldatix.com)  
[LFPSE@rldatix.com](mailto:LFPSE@rldatix.com)

A graphic featuring the text "Support Update" in a bold, white, sans-serif font. The text is centered within a large, horizontal, glowing oval shape. The oval is composed of multiple overlapping, slightly offset lines in shades of teal and light green, creating a sense of motion or a digital signal. The background is a solid, dark teal color.

**Support Update**

# Highlights January – March 25



**1,038** Tickets raised



**889** Tickets Solved



**4** fewer tickets per day compared to 2024



**16** Completed Live upgrades



**85.7%** Average over period



**0** new starters

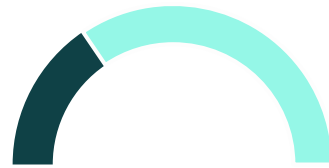
# Highlights January – March 25

For tickets created in this quarter, resolutions were provided in the following timescales:



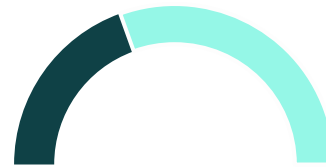
24%

in 3 days



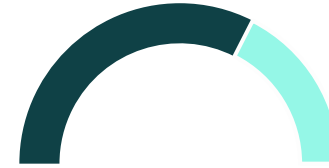
31%

in 7 days



39%

in 14 days

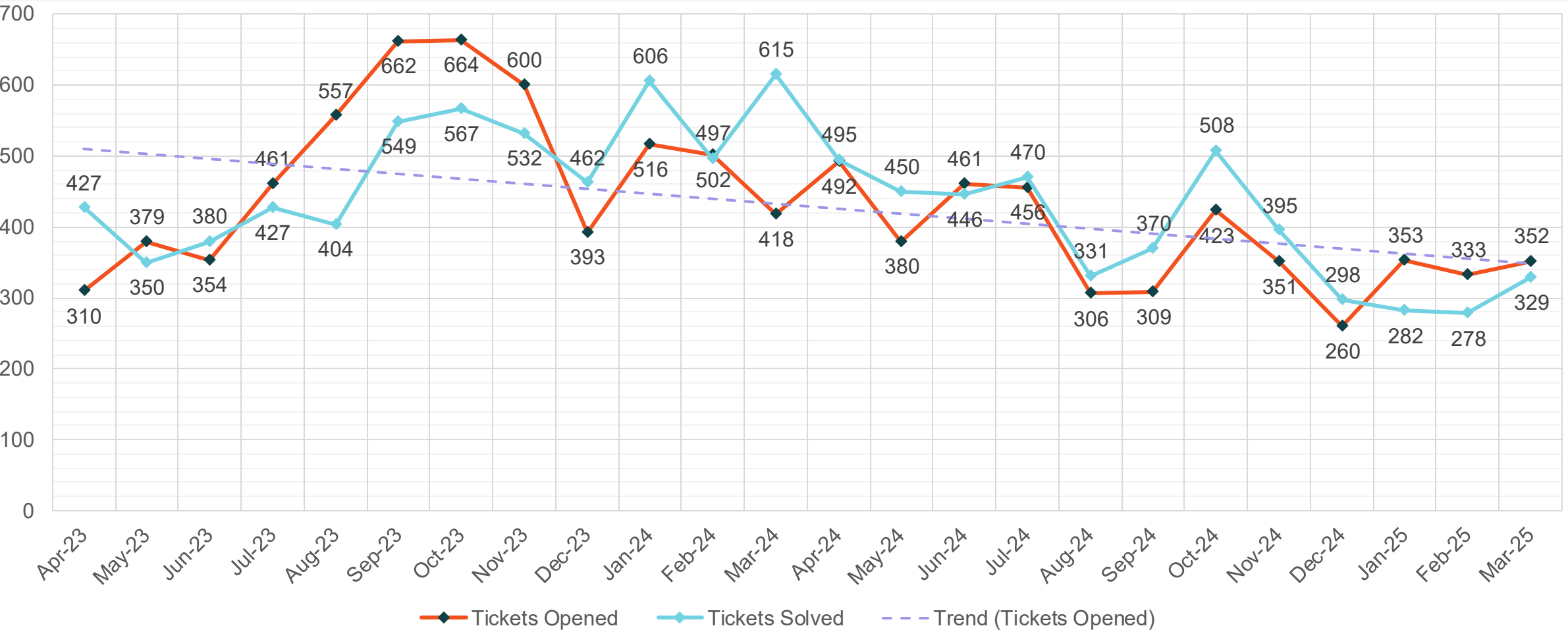


65%

within this quarter

# Last 24 Months

Tickets Created and Solved



# System Status Incidents

Incidents that have occurred in this quarter relating to system performance or availability

<b>DatixWeb</b>	<u>HOSTED   Planned Outage   23/1/25 2300 to 24/1/25 0500   Loss of Service – Governance, Risk &amp; Compliance</u>
-----------------	---

<b>DCIQ</b>	<b>None</b>
-------------	-------------

# Ticket Themes

# Fields not working or showing blank following an upgrade

**Issue:** Fields not work correctly or code setup showing up as blank following an upgrade

**Resolution:** Clearing the cache and cookies need to be done after any upgrade on the devices as these issues can be localized to each device.

You can clear you cache by going into your browser settings going to cookies and site permissions and clicking the below:

## Cookies and data stored

Save cookies and data on your device in order to facilitate continuous browsing between sites and sessions

Manage and delete cookies and site data

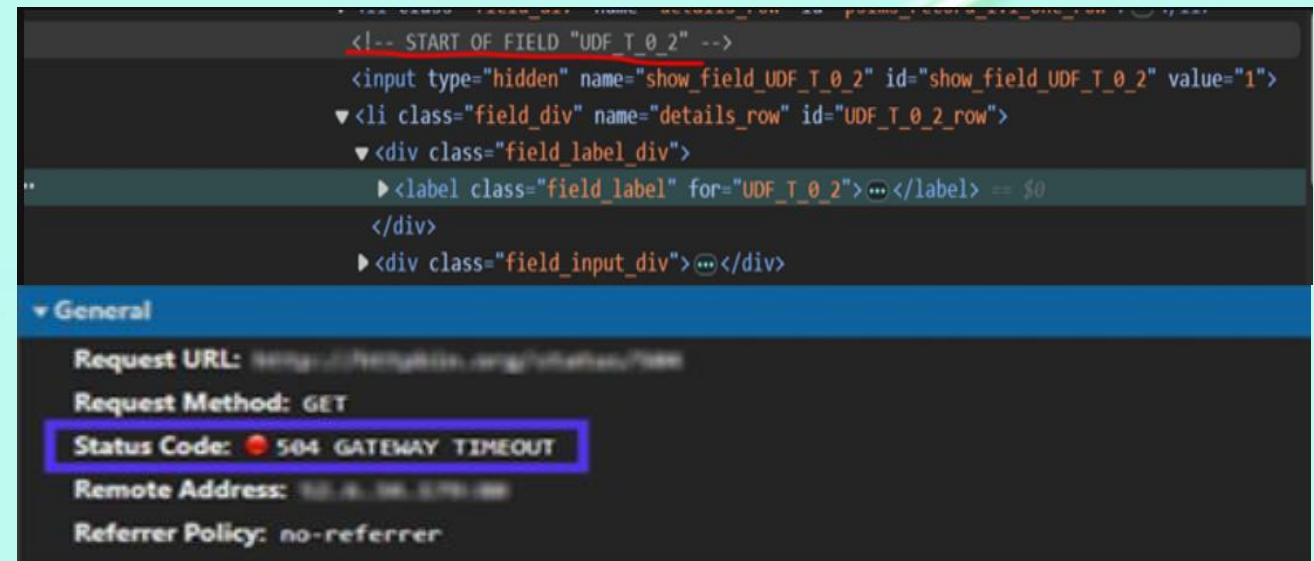
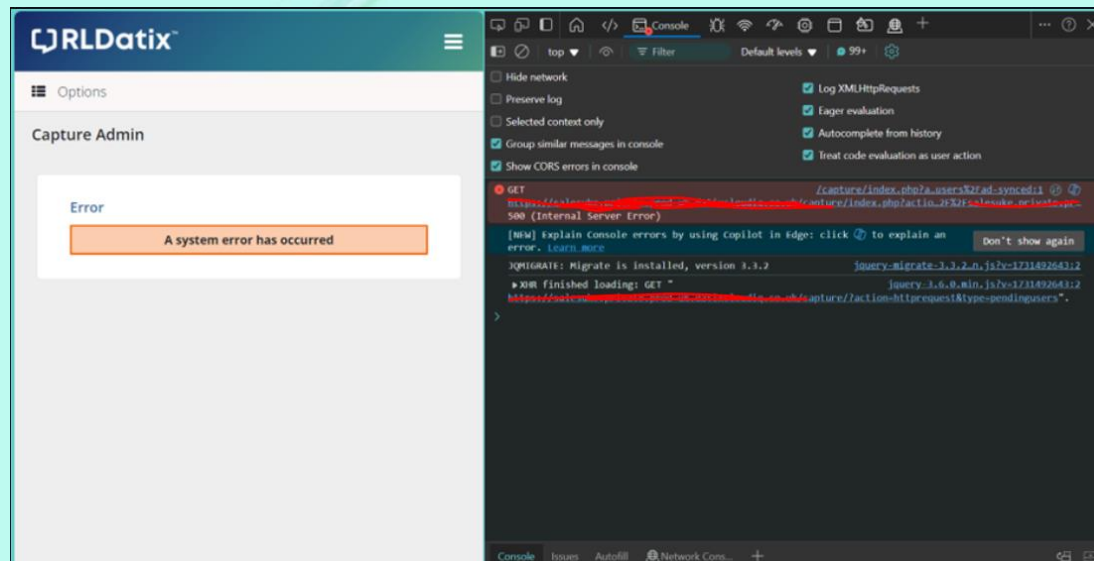


# Developer Browser Tools

## What do we use Dev Tools for?

This is an important tool for us to help get more in-depth information to help us troubleshoot issues from error messages to getting field names, checking network errors and checking up on performance related issues.

[A guide on using developer tools – Governance, Risk & Compliance](#)



# How to Troubleshoot Email Issues?

What information to check when raising an email issues case?

- Is the user who is not receiving emails in an email related security group (Example of how a Email security group looks like compared to a none email security group looks like is below)
- Is there any templates set in the configuration settings, if there is no template set no email will be sent out (Underlined in red below)
- If you raise a case and have already checked these please let us know so we are aware of your investigation.

**Configure Email Templates**

Acknowledgment incident notification  
Incident notification Test

Notifications incident notification  
Choose

Feedback incident notification  
Default Incidents communication and feedback

New handler incident notification  
Default Incidents new handler

New investigator incident notification  
Default Incidents new investigator

Overdue incident notification  
Default Incidents overdue

Reporter progress notification  
Default Incidents reporter progress

Updated incident notification  
Default Incidents updated

24	user location	user location	Record access
13	x	x	Record access and e-mail notification



**Thank you!**