

Reporting incidents using Insight

A guide for care setting staff

Shropshire, Telford and Wrekin ICB

April 2023

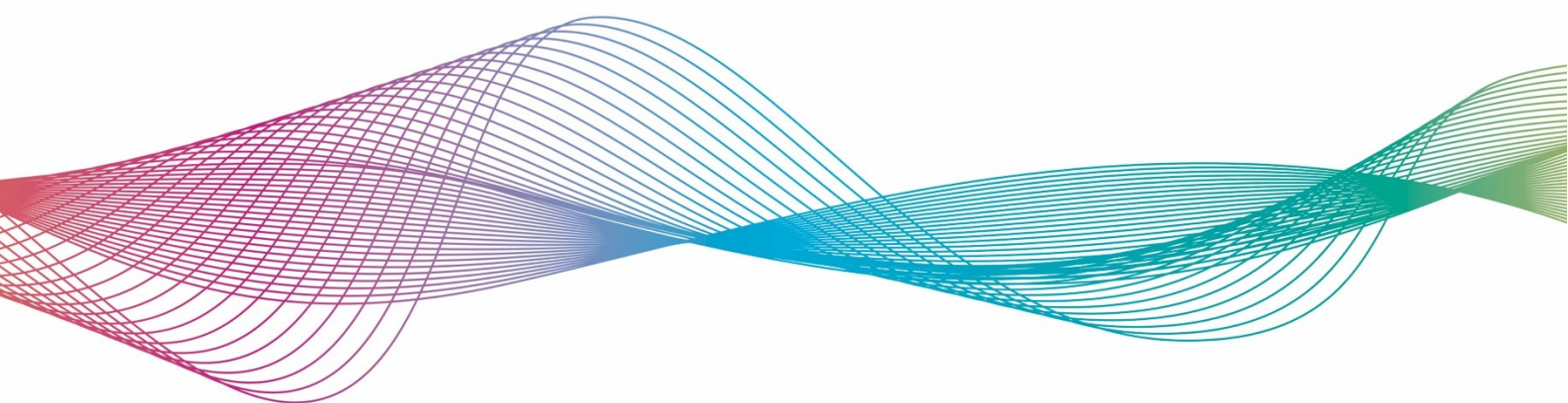


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Guidance notes


If you need to contact the Insight team, details can be found at the end of the guide.

Fields in blue are mandatory.

At any time, you can click on the  icon to collapse that section.

You can spell-check the content of a field by clicking on the  icon

You can 'pop out' a text field by clicking on the  icon. This will give you more visual space to enter the details.

If a field has a  icon to the right of it, click on it to bring up some help text.

It will not be possible to save your progress.

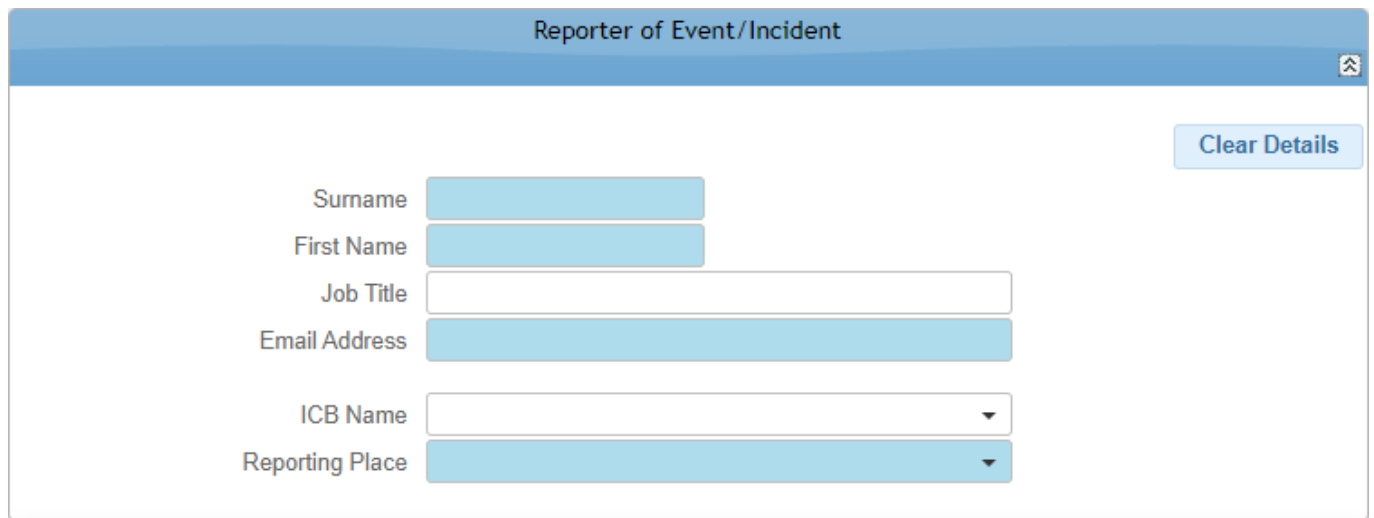
Accessing the reporting form

To report an incident, please use the following web link:

<https://ulysses.midlandsandlancashirecsu.nhs.uk/Incident.aspx?link=D0155A368A63EBE15F>

Reporting form overview

Reporter of event / incident




The screenshot shows a web form titled "Reporter of Event/Incident" with a blue header bar. In the top right corner of the form area is a "Clear Details" button. The form contains six input fields arranged vertically: "Surname" and "First Name" are short text boxes; "Job Title" is a longer text box; "Email Address" is a long text box; "ICB Name" is a dropdown menu; and "Reporting Place" is a dropdown menu.

This section captures the following information:

- Surname
- First Name
- Job Title
- Email Address
- ICB name (populate this with 'Shropshire, Telford and Wrekin Integrated Care Board')
- Reporting Place (select your workplace from the drop-down list)

Incident coding and description

This section captures the following information:

- **Incident Date**
 - Enter the incident date in the DD/MM/YYYY format
 - You can also choose an incident date by clicking on the calendar icon ()
- **Incident Time**
 - Enter the incident time in a 24-hour time format (HH:MM)
- **Please Describe What Happened**
 - Enter an accurate description, in your own words, of what has happened
 - Please do not include any patient (or staff) identifiable data ("PID")
- **Please Enter Any Immediate Actions Taken Following**
 - This is any action(s) taken prior to the incident being added to the inputting form
- **Sub-subject search**
 - Use this to search for the sub-subject that best fits the incident's theme e.g. Admission
- **Domain of Patient Experience / Sub-subject**
 - Domain of Patient Experience and Sub-subject will automatically populate when you select a sub-subject from "Sub-subject search" above
- **Reporting Place Type**
 - Please select 'Care setting – Shropshire, Telford and Wrekin'
- **Type of Incident**
 - Choose an appropriate incident type from the drop-down list

Once complete, click on the [Next](#) button at the bottom.

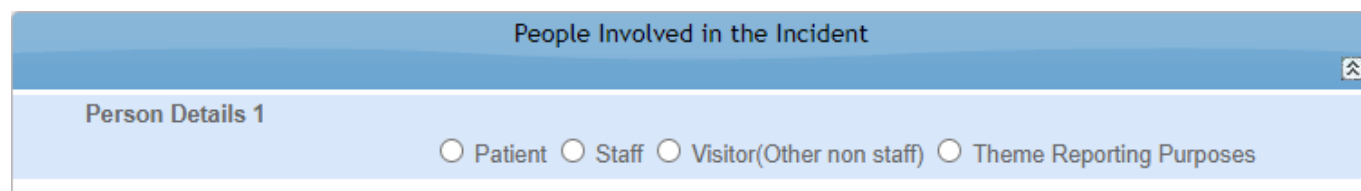
Where the incident happened / found

This section captures the following information:

- Place Search
- Type of Care
- Place (*this field is mandatory*)
- Service
- Speciality/Pathway
- GP Practice of person affected

Search for a place using the Place Search field. The remaining fields will be automatically populated.

People involved in the incident



The screenshot shows a form titled 'People Involved in the Incident'. Below the title is a section labeled 'Person Details 1'. At the bottom of this section are four radio buttons: 'Patient', 'Staff', 'Visitor(Other non staff)', and 'Theme Reporting Purposes'.

This section is mandatory and is used to enter details of the person / people involved in the incident, or for theming purposes.

The section captures the following information:

- Patient
 - NHS Number
 - Date of Birth
 - Were there any injuries?
- Staff
 - Same as person completing the form? (Yes/No)
 - Surname (*this field is mandatory*)
 - Forename (*this field is mandatory*)
 - Job Title
- Visitor / Other non-staff
 - Surname (*this field is mandatory*)
 - Forename (*this field is mandatory*)
- Theme Reporting Purposes
 - Description

The 'Was another Person Involved?' field is mandatory.

Medication

Medication

Was this a Medication Error Incident? ☐ Yes ☐ No

This section captures the following information:

- Was this a Medication Error Incident? (Yes/No)

If Yes is selected, you can enter the following medication details:

Process Error

Type of Error

Drug Given (if incorrect) ? ☐ No Drug Given ?

Was this the correct drug? ☐ Yes ☐ No

Controlled drug? ☐ Yes ☐ No

Critical drug? ☐ Yes ☐ No

Recorded drug? ☐ Yes ☐ No

Dosage Given (if incorrect)

Was this the correct dosage? ☐ Yes ☐ No

Form Given

Was this the correct form? ☐ Yes ☐ No

Route Given (if incorrect)

Was this the correct route? ☐ Yes ☐ No

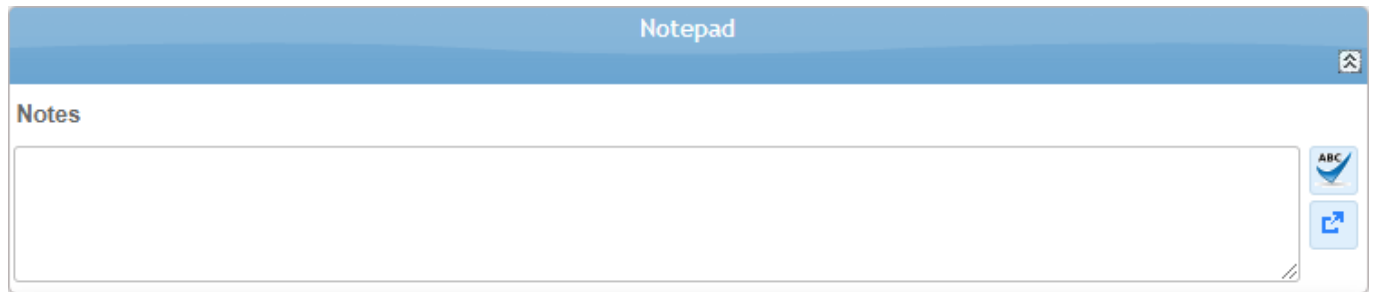
Date/Time Given (if incorrect) (hh:mm)

Was this the correct Date/Time? ☐ Yes ☐ No

Please ensure all relevant fields are completed.

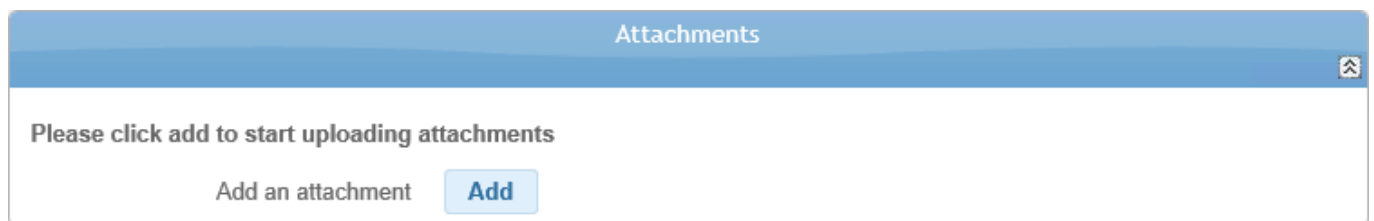
You can add multiple medication errors to this record by clicking [Add a Medication Error](#)

Notepad

A screenshot of a web-based Notepad application. The window has a blue header bar with the title "Notepad" and a close button. Below the header, the word "Notes" is displayed. A large, empty text area for writing notes occupies the main part of the window. On the right side of the text area, there are two small icons: one with "ABC" and a checkmark, and another with a square and an arrow pointing out.

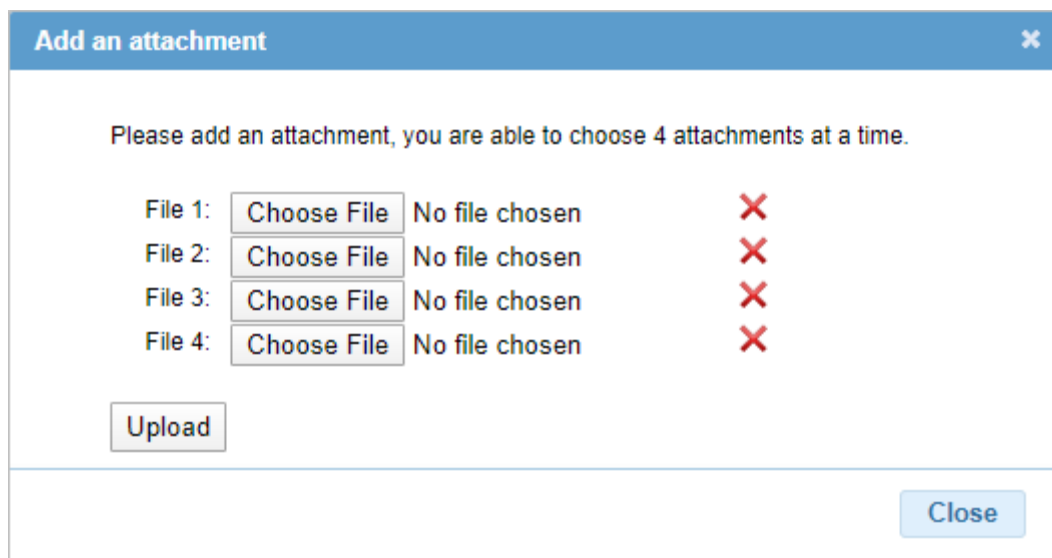
The notepad can be used to record any additional non-patient (or staff) identifiable data ("PID") free-text regarding the record.

Attachments

A screenshot of the Attachments section of a web application. It features a blue header bar with the title "Attachments" and a close button. Below the header, the text "Please click add to start uploading attachments" is displayed. Underneath this text, there is a label "Add an attachment" followed by a blue button labeled "Add".

You can use this section to upload / attach documents to support the record.

If Add is selected, you will see:

A screenshot of a dialog box titled "Add an attachment" with a close button (X) in the top right corner. Inside the dialog, the text "Please add an attachment, you are able to choose 4 attachments at a time." is displayed. Below this text, there is a table with four rows, each representing a file slot. Each row contains a label (File 1: through File 4:), a "Choose File" button, the text "No file chosen", and a red "X" icon. At the bottom left of the dialog is an "Upload" button, and at the bottom right is a "Close" button.

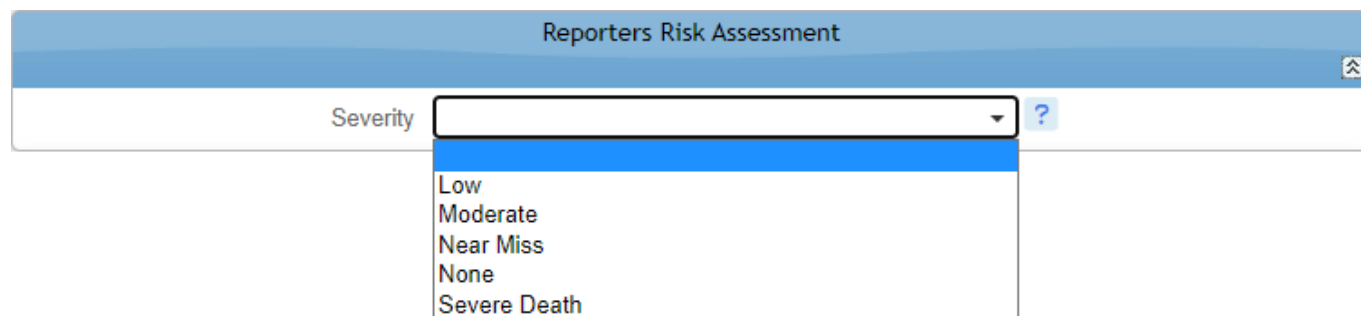
Four attachments can be added at a time.

To upload more than four attachments, after clicking 'Close' to upload your current four, click on 'Add' again in the Attachments section.

Click on the  icon to delete an attachment.

Attachments will have the same name as the name of the file that was uploaded.

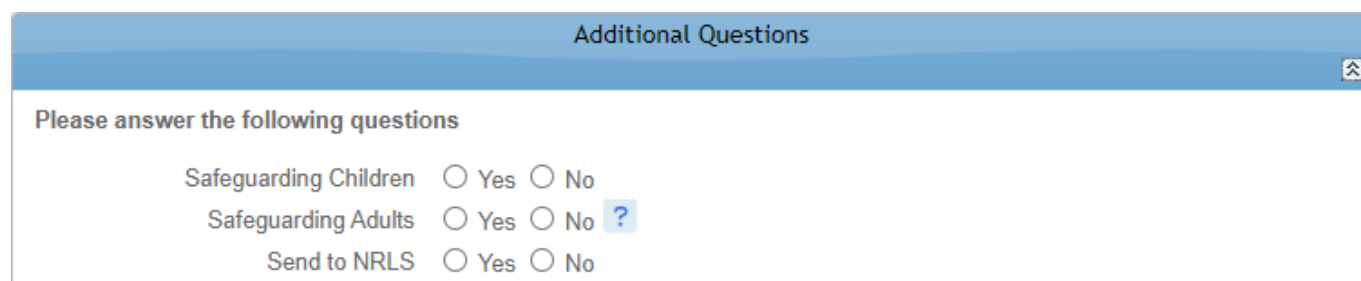
Reporters risk assessment



The form is titled "Reporters Risk Assessment" in a blue header bar. Below the header, there is a label "Severity" followed by a dropdown menu. The dropdown menu is open, showing five options: "Low", "Moderate", "Near Miss", "None", and "Severe Death". To the right of the dropdown menu is a blue question mark icon. The form has a light blue background and a small upward arrow icon in the top right corner of the header bar.

Rate the severity of the incident based on the amount of harm or damage caused at the time of the incident.

Additional questions



The form is titled "Additional Questions" in a blue header bar. Below the header, there is a text prompt "Please answer the following questions". Below this prompt, there are three questions, each with a radio button for "Yes" and a radio button for "No". The questions are: "Safeguarding Children", "Safeguarding Adults", and "Send to NRLS". To the right of the "Safeguarding Adults" question is a blue question mark icon. The form has a light blue background and a small upward arrow icon in the top right corner of the header bar.

This section captures the following information:

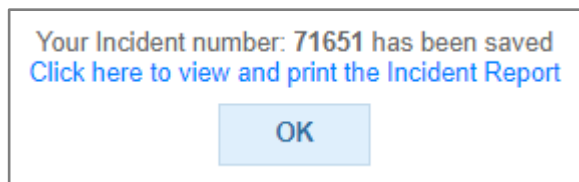
- Safeguarding Children (Yes/No)
- Safeguarding Adults (Yes/No)
- Sent to NRLS (Yes/No)

If Yes is selected to these questions, an additional 'Report sent?' (Yes/No) field will appear also.

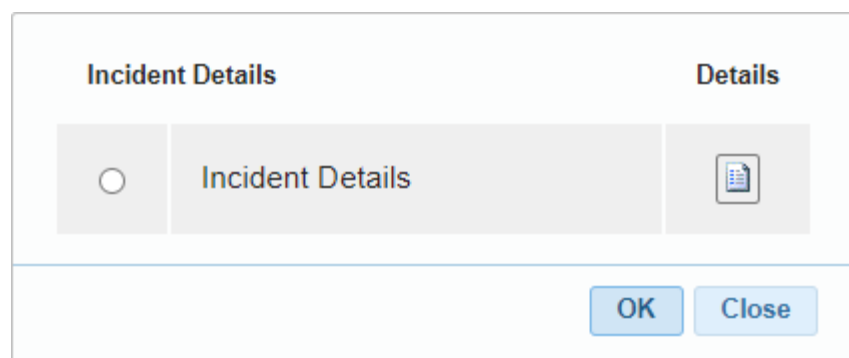
Submitting and/or printing the record

Once you have entered all Incident details, click on the Submit and Close button.

At this point, you will be able to print the record by clicking on the 'Click here to view and print the Incident Report' link.



Upon clicking the link, select the button to the *left* of 'Incident Details' and click OK.



This will display a PDF copy of the record in your Web browser.

You can then either  download it or  print it.

Contact the Insight team

If you require assistance with the Insight database, you can contact the helpdesk by e-mail: mlcsu.insightteam@nhs.net.