

Using the CRM for Healthwatch Hampshire

Questions or trouble logging in?

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How to login to the CRM

Use an internet browser and click on the link on the CRM Support webpage on the Healthwatch Hampshire website.

You will need your bureau's CRM Login

Some examples of Login ID's:

basingstokecab@healthwatchhampshire.co.uk

tadleycab@healthwatchhampshire.co.uk

Passwords need to be reset periodically so it may be worth recording new passwords in a safe place for all bureau staff to see.

If your password needs to be reset the new password will be sent to the email address that is your login. If you lose the password for the email account you will need to contact Sian Martyn whose details are above to get this reset.

Write the login details for your bureau below and keep them safe!

Bureau Name:

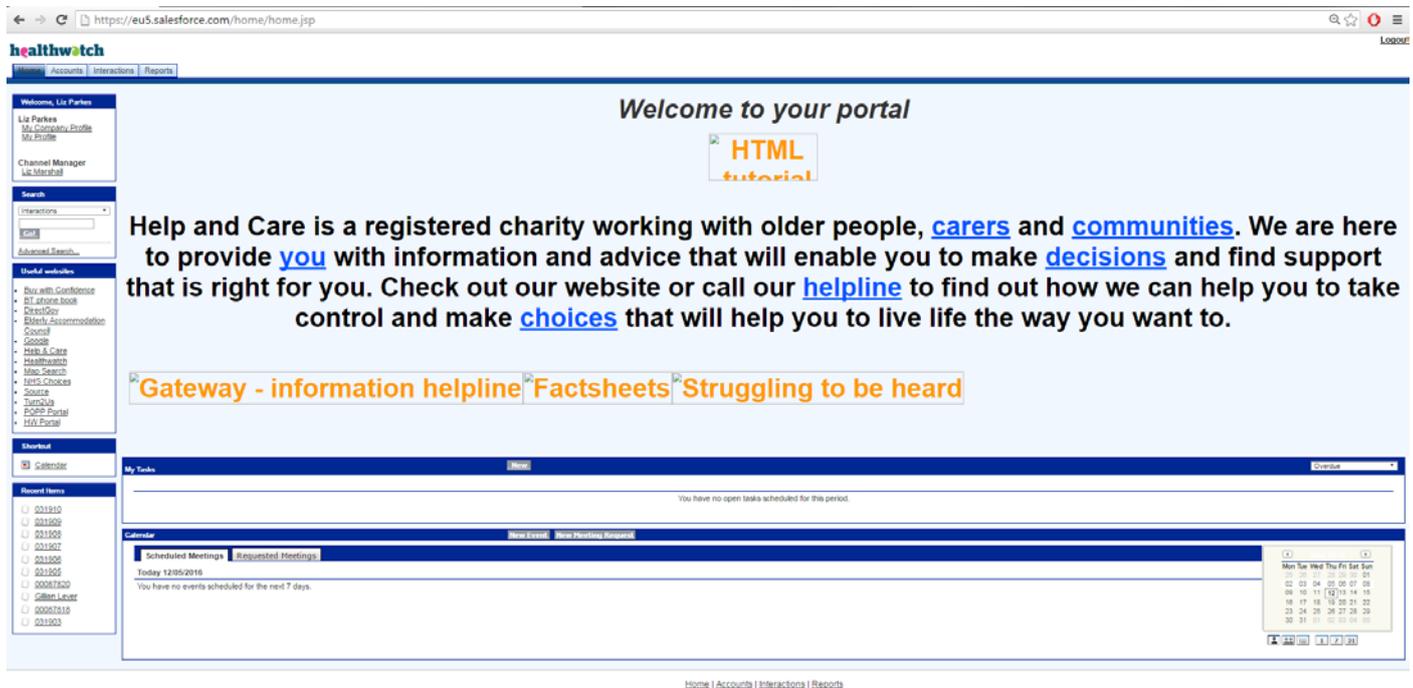
Login:

Password:

This is the process to follow for all new experiences and stories that are to be recorded in the CRM.

We are interested in all health and social care related issues.

Once you have logged in you will see this screen



To record feedback on the CRM

First add a new account

To start recording a piece of feedback the first thing you need to do is add a person account to link the interaction to. To do this go to the top of the left of the screen and click on the accounts. On the next screen click on the little 'new' button which is in the blue part of the recent accounts section.

Person account should already be selected so just click continue on the next screen.

You will then be taken to a page called New Account – on this page the important information:

- Last Name: put the petra number in here
- Data protection explained: select yes
- Ethnicity: please try and fill this in as best you can – if you don't know please select "not asked"
- In the receiving summary at the bottom click on Healthwatch and select Hampshire from the drop down box.

Make sure you click on save right at the bottom of the page.

You will then be taken to the account summary page. Scroll down a fair way until you see the interaction section. Select new interaction.

New Interaction

On this next page select Healthwatch Interaction (will already be preselected) from the list and click continue.

Information to fill in on the interaction information section

- Contact/Account name: leave blank
- Interaction origin: select CAB
- Interaction detail: select CAB Bureau i.e. Winchester and add the petra number
- How did you hear about us: this information helps us with our promotion
- Referrer: leave blank

Interaction details

- Services: this defaults to Healthwatch
- Services plus: this is for advocacy services only. Select NHS Complaints Advocacy Hampshire Project if the case is being handled by advocacy service, otherwise select none.
- Project: enter Healthwatch Hampshire
- Commissioner: leave blank unless you know who the commissioner is of the service
- Sentiment: this is important for us. Please choose from the drop down list.
- Would you recommend us? This field does not apply to Healthwatch, please leave blank
- Keywords: please enter some summary words that will allow us to quickly summarise what the issue is about. Please try to avoid generic phrases which do not tell us anything such as 'Lady wants to complain'.
- What happened: Use this to enter a full summary of the client's story. This should include experiences, problems, outcomes, safeguarding and impact on the client as well as their thoughts. Please include as many details as possible (it also needs to be concise). When writing please make sure that you keep the what happened box anonymous! (you only put the details in on the contacts section of the account if they are being referred to another service i.e. NHS Complaints Advocacy Team)
- Commentator audience: please select individual.
- Commentator type: Please choose from the drop down list how the caller is related to the story. If the issue is about themselves, choose service user.
- Email newsletter: please don't offer this as an option

Safeguarding – if you think there could be a safeguarding issue involved in the story follow the CAB National Safeguarding Policy. If you are unsure, please ask your supervisor.

Select submit to complete the interaction.

On the next page scroll down to topics which is further down the page.

Select new topics – now you need to add the topics to the interaction. When you have entered the topics you will then be asked to select a specific and the service provider. This changed in April 2016 to make it easier to input the data. The topics now reflect the service provider. For example, if you have an interaction that is about abc GP and xyz hospital. Abc GP was about access to services and xyz hospital was about waiting times you can add the service provider to the topics.

You must add the service provider if it's known!

Healthwatch Mandatory Additions

The **mandatory** additions of topics and sub topics can be added at this stage. These fields are very important for Healthwatch Analysis, and **must be completed**. Please try and be as accurate as possible to help with our analysis and reporting. You will be able to do this process several times. The topics and subtopics are now linked to the service provider so that you can use more than one topic for each service provider that has been mentioned in the individual's story. Please avoid using the 'None' option as far as possible and please ensure that you try and put the topics and subtopics in each Healthwatch Interaction.

Please refer to the Healthwatch Lists provided to help you make your choice. Please take your time when looking through these lists.

Topic/Sub topic: Select which issue the case is about from the drop down menu. First select a 'Topic' category, and then a more precise detail for 'Sub topic'.

Service type/Specific: These fields identify which type of services the case relates to. First select the main 'service type' and then choose a more detailed category in 'Specific'.

Service provider: You can add that in there and link the Topic/Sub topic and Service type/Specific to each of the service provider(s) mentioned in the story. Please try and include the service provider as best you can. If you do not know the service provider please use 'unknown' but try to avoid using this as best you can.

We recommend that you make several entries for these fields, as many are relevant to the story.

Please note that you can enter as many as you like by selecting 'Save and New' and repeating the process.

Select 'Save and New' to repeat the process (please do not press save between entries). It is important to always leave the pre-filled interaction topic number in the first field.

Only press save when you have finished entering your topics – select Save.

You can add as many topics to a story (interaction), and as many interactions to a person.

Healthwatch List of Topics and Sub topics

Please take your time when using these notes to make the best selection(s).

The guide notes in the brackets are summaries or abbreviations to help you select your topics/subtopics. They are not all inclusive, and are provided as a guidance only.

Please note that the topics and subtopics have changed since 1st April 2016.

List of Topics and Sub Topics

(The topics are on the left handside and the subtopics are on the right handside)

Access and choice	Choice of professional	Home visits
	Choice of provider	Opening times

	Consent to treatment	Transport and travel
	Getting an initial appointment	
Pathways of care	Admissions	Prescription handling
	Arrangements after a death	Provision of information
	Diagnostics	Referrals & delay to referrals
	Discharge	Service co-ordination
	Follow-up & support	Waiting within a service/waiting times
Communication	Communication to patients	Information
	Communication between staff	
Quality of care	Cleanliness & infection control	Nutrition and hydration
	Confidentiality	Records management
	Dignity and respect	Treated as an individual
	Medicines management	
Safety	Absence of a service user	Injury or near miss
	Death of a service user	Risk monitoring
	Inappropriate restraint	Safeguarding and abuse
	Incident reporting	Safety of care & treatment
Staff and staffing	Staff attitudes	Staff skills & training
	Staffing levels	
Location	Buildings & facilities	Equipment
	Car parking	
Equality	Inequality of care	Physical accessibility
	Language & culture	
Participation	Complaints handling	Public involvement
	Involvement in own care	
Cost	Fees for other services	Fees for care or treatment
	Fees for medication	Transport and travel costs

List of Services Type and Specifics

(The service types are on the left handside and the specifics are on the right handside)

Health specialties	Audiology (hearing)	Mental health (adult)
	Cancer care	Mental health (child & adolescent)
	Cardiology (heart and circulation)	Neonatology (Newborns)
	Care of the elderly	Neurology (nervous system)
	Dementia care	Ophthalmology (medical and surgical eye problems)

	Dentistry (“High Street” dentistry)	Oral & maxillofacial services (hospital dentistry)
	Dermatology (disorders of the skin, nails and hair)	Orthopaedics (musculoskeletal)
	Diabetes care	Paediatrics (children’s medical care)
	Diet/nutrition	Podiatry/Chiropody (feet)
	Ear, nose & throat	Renal care (kidneys)
	Gastroenterology (digestive system)	Respiratory care
	Gynaecology (specific female disorders)	Rheumatology (disorders of the joints, muscles and ligaments)
	Haematology (blood disorders)	Sexual health
	Hepatology (liver, gallbladder, pancreas)	Stroke care
	Maternity & pregnancy	Urology (urinary system)

Health settings & disciplines	111 & Out-of-hours	Minor Injuries Unit
	Accident and emergency	Occupational therapy
	Acute care	Optometry (vision, lenses usually “High Street” services)
	Ambulance	Outpatient services
	Blood test (Phlebotomy)	Pathology (tests, examination of samples)
	Community clinic (health-centres that are not in a hospital or GP setting)	Pharmacy
	Community hospitals	Physiotherapy
	Community nursing (district nursing)	Prison healthcare
	Complementary therapies	Public health/health promotion
	General practice	Rehabilitation
	Health visiting	Speech & language therapy
	Inpatient care (treatment in hospital)	X-rays and scans

Specific care services	Adult social care	Learning disabilities
	Care assessments	Specialised accommodation
	Child & family social care	Substance misuse
	Children’s centres	Victim support
	End of life care	Autism/ADHD

General care services	Care at home	Nursing care home
	Carers services	Residential care home
	Day care	Respite care
	Hot meals services	

