

Custom Patient Lists

User Guide

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Create a personalised list by adding and removing individual patients on PPM+, this includes both patients that are admitted and not admitted.

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Currently Admitted Patient List

This allows you to create a Recently Admitted Patient List using multiple filters e.g. patients admitted to a ward in the last 24 hours under Dr. Bloggs.

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Recently Discharged Patient List

This allows you to create a Discharged Patient List using multiple filters e.g. ward attenders discharged from your ward in the last 24 hours.

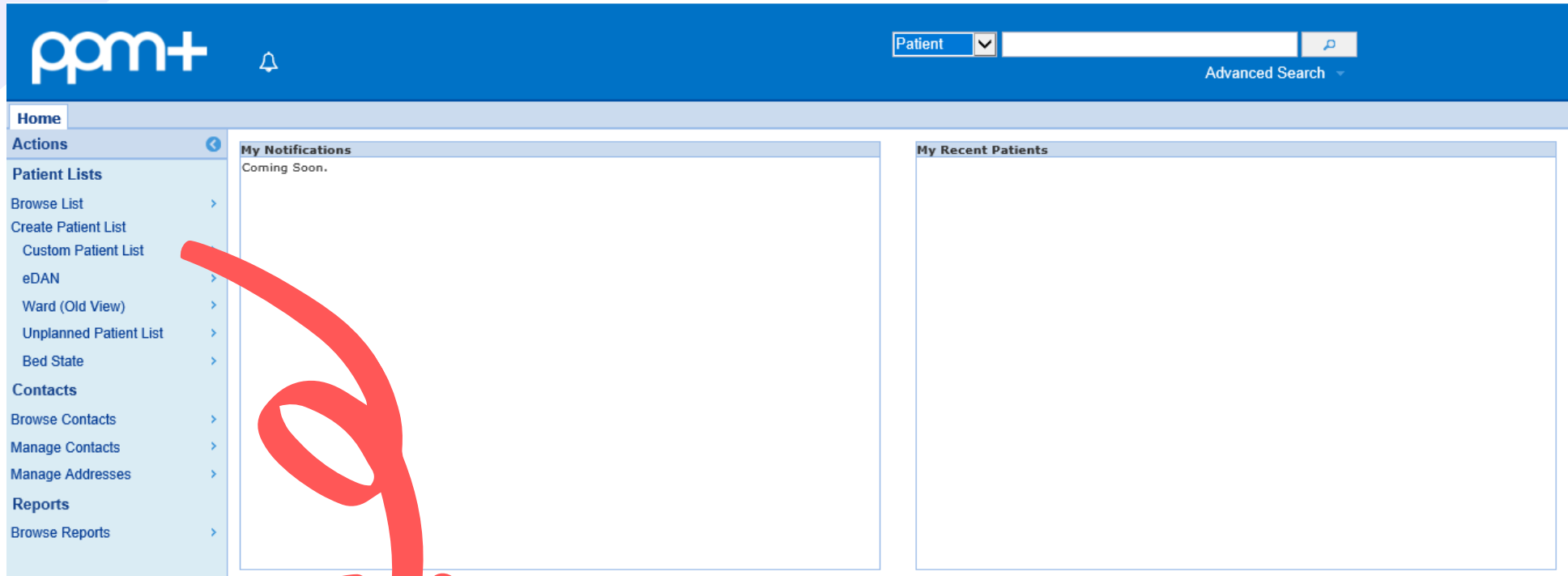
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Custom Patient Lists

Find, share and edit a Custom Patient List. Find out about Handover Tips for your Custom Patient List.

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Patient List



From the PPM+ homepage click on
Custom Patient List.

The screenshot shows a 'Custom View' configuration window. At the top, there are two dropdown menus: 'Category' (set to 'Patient List') and 'Name' (with a placeholder 'Enter View Name'). Below these are 'Filters' and 'Sharing' tabs. The 'Filters' tab is active, showing a 'Choose Filter Type' section with a dropdown set to 'Patient' and a search box containing 'testteam'. Below the search is a 'Select Patient' list with three entries: 'TESTTEAM, Five-Five (Mrs)' (highlighted), 'TESTTEAM, Four (Mr)', and 'TESTTEAM, Oneppm (Miss)'. To the right, the 'Filter Criteria' section shows a table with one row: 'TESTTEAM, Five-Five (Mrs)' with NHS number '01-Jan-1986 999 999 9557'. At the bottom are 'Cancel' and 'Save' buttons.

Filter Criteria	
Patient	
TESTTEAM, Five-Five (Mrs)	01-Jan-1986 999 999 9557

Step 1

From the category dropdown list select **Patient List**.

Step 2

From the filter types select **Patient**.
Search patient by name or NHS number and click the plus icon this will add the patient to your list.

Step 3

Click **Name** to rename your **Patient List** and click save. Remember to give your Patient List a unique name to differentiate it from the others

Step 4

If you add a patient to the list by mistake use the **bin icon** and this will remove them. Once all information is correct, click **Save**.

This is what your **Patient List** will look like

test 99 ⓘ							
Action	Patient	NHS Number	Age	Ward	Review Date	Comments	
▼	ANN TEST Ann		80y				
▼	DENTAL Test		45y				
▼	DENTAL Test		19y				
▼	TESTTEAM Five-Five	999 999 9557	34y	LPMI (LGI)			
▼	TESTTEAM Four		80y	TEST EPR ZZZ			
▼	TESTTEAM Oneppm	947 671 9915	85y	TEST EPR ZZZ			
▼	TESTTEAM Seven	999 009 9529	78y	TEST EPR ZZZ			
▼	TESTTEAM Six	999 009 4055	89y	TEST EPR ZZZ			
▼	TESTTEAM Three		4y	TEST EPR ZZZ			

Actions

The **Actions** section will allow you to carry out the three functions shown above:

- **Create a copy**
- **Edit Custom List**
- **Handover**

Edit

Edit Custom List is where you can add/remove patients, share the list and rename the list.

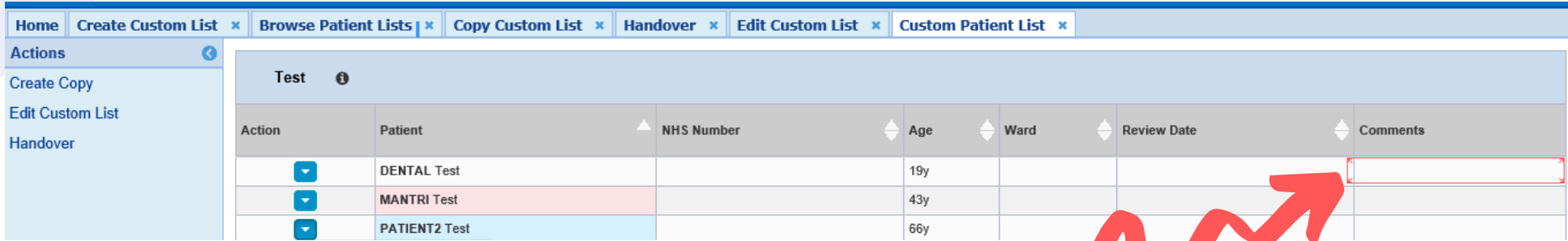
Handover

Handover is where you can access the handover for each inpatient.

Copy

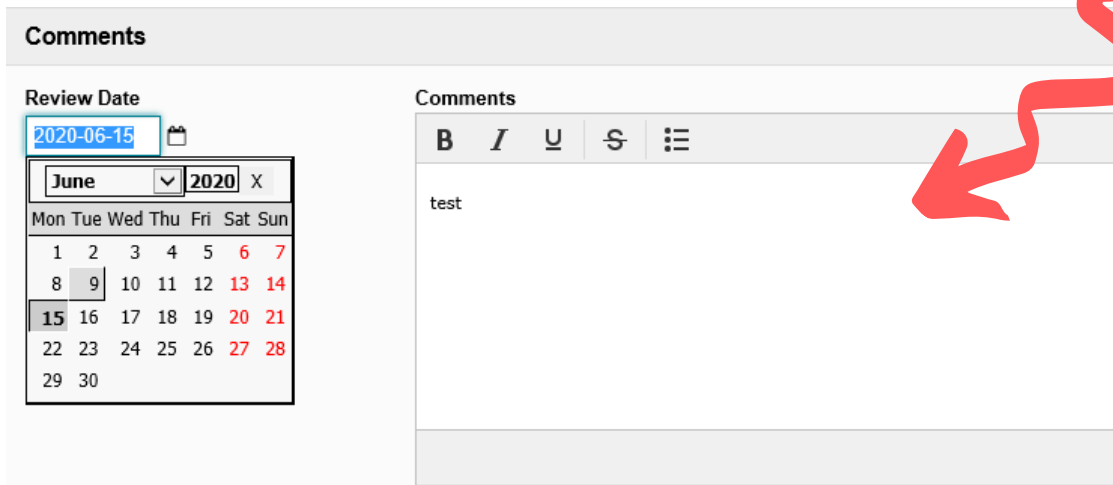
If you create a **copy** of a shared list then any amendments to that copied list are only for yourself. Amendments on a shared list are reflected for all.

Comments/Notes



Action	Patient	NHS Number	Age	Ward	Review Date	Comments
<input type="checkbox"/>	DENTAL Test		19y			
<input type="checkbox"/>	MANTRI Test		43y			
<input type="checkbox"/>	PATIENT2 Test		66y			

From your Patient List view click on the comments column. This is where you can add comments to the patient and change the review date.



Comments

Review Date: 2020-06-15

June 2020

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Comments: test

Patient comments are a part of the Patient List, so will not move with the patient if you put them into a different list. If you then delete the old Patient List, the comments will be deleted.

The functionality to manage Patient Lists can be found from either the ward or single patient view. From there you can add or remove patients from your Patient List.

Action	Ward	Bed	Patient	Age	Time Since Arrival	Tasks	Speciality	LOS	EDD	MOF
Bed Unassigned										
TEST EPR			EDITESTPATIENT Three	18y	29d 2h 47m	3 (3 overdue)	Surgery	100d		
			PATIENT Itu	65y	3h 24m	3 (3 overdue)	Surgery	0d		
			TEAM Oneppm	85y	3h 2m	4 (4 overdue)	Surgery	0d		
			TEAM ourfourfourfour	80y	29d 55m	6 (6 overdue)	Medicine	109d	17-Apr-2020	

Currently Admitted Patient List

Custom View

Category: Currently Admitted Patient List

Name: Enter View Name

Filters | Sharing

Choose Filter Type: Ward Stay Type

Filter Criteria:

- Ward Stay Type
 - Ward Stay (Inpatient & Daycase)
 - Ward Attender

Ward Stay Type

In the category drop down list select **Currently Admitted Patient List**, then select your filter. For the ward stay type you can select **Ward Stay (Inpatient & Daycase)** and/or **Ward Attender**.

Choose Filter Type: Clinical Review

Select Clinical Review:

- Consultant
- Junior Doctor
- Nursing

Filter Criteria:

- Clinical Review [Include] [Exclude]
- Consultant
- Junior Doctor
- Nursing

Clinical Review

The next filter you can pick from is **Clinical Review**. This allows you to filter between clinician type (here you can select multiple clinicians). The include/exclude function allows you to filter further.

Choose Filter Type

Current Consultant

Name: test

Initials: Initials...

GMC: GMC...

Specialty: Specialty...

Search

Select Current Consultant

A LETTER TEST - Surgery

Filter Criteria

Current Consultant [Include] [Exclude]

A LETTER TEST - Surgery

Current Consultant



The next filter type is **Current Consultant**. You can search by their **Name**, **Initials**, **GMC** and **Speciality**. You can also use the include and exclude function.

Choose Filter Type

Current Consultant Speciality

Search: medicine

Search

Select Current Consultant Speciality

Audiological Medicine

Filter Criteria

Current Consultant Speciality

Audiological Medicine



Current Consultant Speciality

The next filter is **Current Consultant Speciality**, here you can filter by the different specialities.

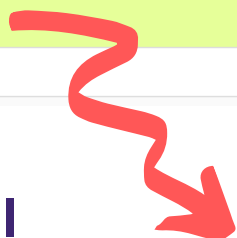
Choose Filter Type	Filter Criteria
Current Ward	Current Ward [Include] [Exclude]
Search: zzz	TEST EPR ZZZ
Select Current Ward	TEST EPR ZZZ1
TEST EPR ZZZ ✓	
TEST EPR ZZZ1 ✓	



Current Ward

This filter allows you to select multiple wards. It also gives you the ability to include or exclude additional wards.

Choose Filter Type	Filter Criteria
Recent Admissions To The Hospital	Recent Admissions To The Hospital
Select Recent Admissions To The Hospital	Admitted to hospital within 72 hours (3 days)
Admitted to hospital within 24 hours (1 day) +	
Admitted to hospital within 48 hours (2 days) +	
Admitted to hospital within 72 hours (3 days) ✓	
Admitted to hospital within 96 hours (4 days) +	



Recent Admissions To The Hospital

This allows you to filter by when the patient was admitted to the hospital. You can select within one, two, three or four days.

Recently Discharged Patient List

Custom View

Category: Recently Discharged Patient List (dropdown) Name: test 800 (text input)

Filters | Sharing

Choose Filter Type

Ward Stay Type (dropdown)

Select Ward Stay Type

Ward Stay (Inpatient & Daycase)	+
Ward Attender	✓

Filter Criteria

- Ward Stay Type
- Ward Attender

Ward Stay Type

In the category drop down list select **Recently Discharged Patient List**, then select your filter. For the **ward stay type** you can select **Ward Stay (Inpatient & Daycase) and/or Ward Attender**.

Recent Discharges From The Hospital

You can filter by **Recent Discharges From The Hospital** and then select one, two, three or four days.

Category: Recently Discharged Patient List (dropdown) Name: test 800 (text input)

Filters | Sharing

Choose Filter Type

Recent Discharges From The Hospital (dropdown)

Select Recent Discharges From The Hospital

Patients discharged from hospital within 24 hours (1 day)	+
Patients discharged from hospital within 48 hours (2 days)	+
Patients discharged from hospital within 72 hours (3 days)	✓
Patients discharged from hospital within 96 hours (4 days)	+

Filter Criteria

- Recent Discharges From The Hospital
- Patients discharged from hospital within 72 hours (3 days)

Cancel Delete Save

Choose Filter Type

Discharged From Ward (dropdown)

Search: zzz (text input) Search (button)

Select Discharged From Ward

TEST EPR.ZZZ	✓
TEST EPR.ZZZ1	✓

Filter Criteria

- Discharged From Ward **Include Exclude**
- TEST EPR.ZZZ
- TEST EPR.ZZZ1

Discharged From Ward

This filter allows you to select multiple wards. It also gives you the ability to include or exclude these wards.

This is an example of how you can apply multiple filters to a Recently Discharged Patient List.

Category

Name

Filters

Sharing

Choose Filter Type

Search Search

Select Discharged From Ward

TEST EPR ZZZ	✓
TEST EPR ZZZ1	+

Filter Criteria

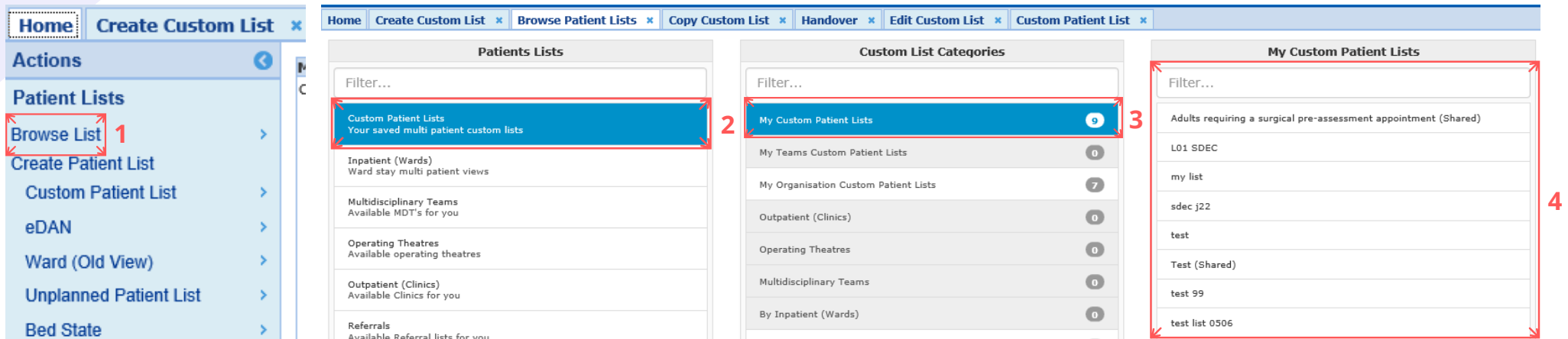
- ✕ **Ward Stay Type**
- ✕ Ward Attender
- ✕ **Recent Discharges From The Hospital**
 - ✕ Patients discharged from hospital within 24 hours (1 day)
- ✕ **Discharged From Ward**

Include
Exclude
- ✕ TEST EPR ZZZ

Cancel
Delete

Save

Finding a Custom Patient List



Step 1

From your PPM+ homepage click on **Browse List**.

Step 2

From Patients Lists select **Custom Patient Lists**.

Step 3

From Custom List Categories select **My Custom Patient Lists**.

Step 4

From **My Custom Patient Lists** select the relevant list you want to view.

(Shared) indicates a list has been shared with you.

Sharing a Custom Patient List

The screenshot shows a 'Sharing' dialog box. At the top left, the 'Filters' tab is active, and the 'Sharing' sub-tab is highlighted with a red box and the number 5. Below this, there is a 'Search Contact' section with a search input field containing 'adam smith' and a blue 'Search' button. Underneath is a 'Select Contact' section where 'Smith, Adam Charles (Mr)' is selected and highlighted in green, with a red box and the number 6. To the right, the 'Share With' section shows the same user, 'Smith, Adam Charles (Mr)', with a red box and the number 7. Next to the user name are three checkboxes: 'Read List' (checked), 'Edit List' (unchecked), and 'Delete List' (unchecked). At the bottom left are 'Cancel' and 'Delete' buttons, and at the bottom right is a blue 'Save' button with a red box and the number 8.

Step 5

Click on the **Sharing** tab, search for the colleague or team you want to share your list with. Please note you can only share lists with PPM+ users who have created a contact on PPM+.

Step 6

Click on the plus icon to add your colleague or team. If you add a person or team in error - use the bin icon to remove them.

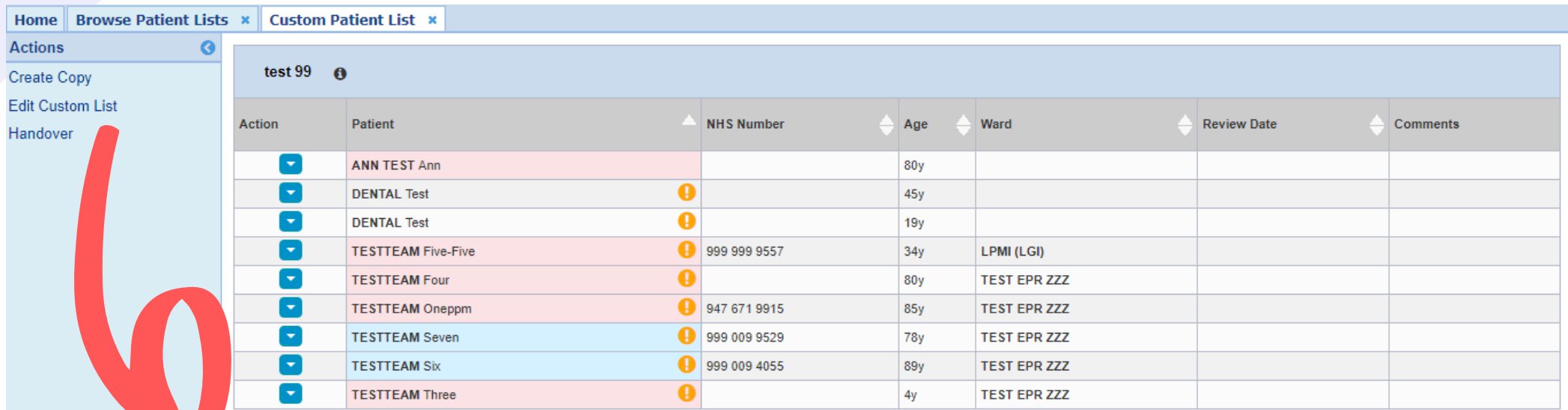
Step 7

Select the tick boxes next to the user(s) to give them the required permissions.

Step 8

Once you have selected the required permissions, click **Save**.

Editing a Custom Patient List



Home Browse Patient Lists x Custom Patient List x

test 99 ⓘ

Action	Patient	NHS Number	Age	Ward	Review Date	Comments
<input checked="" type="checkbox"/>	ANN TEST Ann		80y			
<input checked="" type="checkbox"/>	DENTAL Test	ⓘ	45y			
<input checked="" type="checkbox"/>	DENTAL Test	ⓘ	19y			
<input checked="" type="checkbox"/>	TESTTEAM Five-Five	ⓘ 999 999 9557	34y	LPMI (LGI)		
<input checked="" type="checkbox"/>	TESTTEAM Four	ⓘ	80y	TEST EPR ZZZ		
<input checked="" type="checkbox"/>	TESTTEAM Oneppm	ⓘ 947 671 9915	85y	TEST EPR ZZZ		
<input checked="" type="checkbox"/>	TESTTEAM Seven	ⓘ 999 009 9529	78y	TEST EPR ZZZ		
<input checked="" type="checkbox"/>	TESTTEAM Six	ⓘ 999 009 4055	89y	TEST EPR ZZZ		
<input checked="" type="checkbox"/>	TESTTEAM Three	ⓘ	4y	TEST EPR ZZZ		

From the **Custom Patient List** view, click on **Edit Custom List** located in the **Actions** section on the left hand side.

Handover Tips

The screenshot shows a web application interface for handovers. At the top, there are navigation tabs: Home, Browse Patient Lists, Custom Patient List, and Handover. Below the tabs, there are buttons for 'Prev' and 'Next'. The main content area displays patient information for 'DENTAL, Test', born 05-Nov-2000. A message states: 'There is no admission record for the selected patient and thus no handover summary exists, please navigate to the Single Patient View (SPV) for further information relating to the patient you have selected.' A red arrow points from the text below to this message.

A patient on your list, who is not an inpatient, will not have any handover comments displayed. This is shown above.

Print Preview

Bed	Patient	Age	Clinical Summary	Handover Comment	Medical Jobs	Observation	Observation Due
	TESTTEAM Oneppm	85y	[Comment A added on zzz]	[Comment A added on zzz]	[Comment A added on zzz]		19h 53m (every 15m)
Bed 1	TESTTEAM Oneppm	85y				↑12 (3)	170h 8m (hourly)
Bed 5	TESTTEAM Three	4y					1533h (every 15m)
Bed 6	TESTTEAM Four	80y	test	test		↓2 (7)	207h 38m (4 hourly)
Bed 8	TESTTEAM Six	89y	Test	Test gfgd		↑13 (2)	1124h 20m (hourly)

Printing of Custom Patient Lists is not advised by the Trust, if you decide to print your Custom Patient List via the handover page, please be aware that only patients admitted to a ward will be visible.

For further information on handovers, see the user guide by clicking [here](#) or by visiting the PPM+ Helpsite at <https://www.ppm-support.leedsth.nhs.uk/>

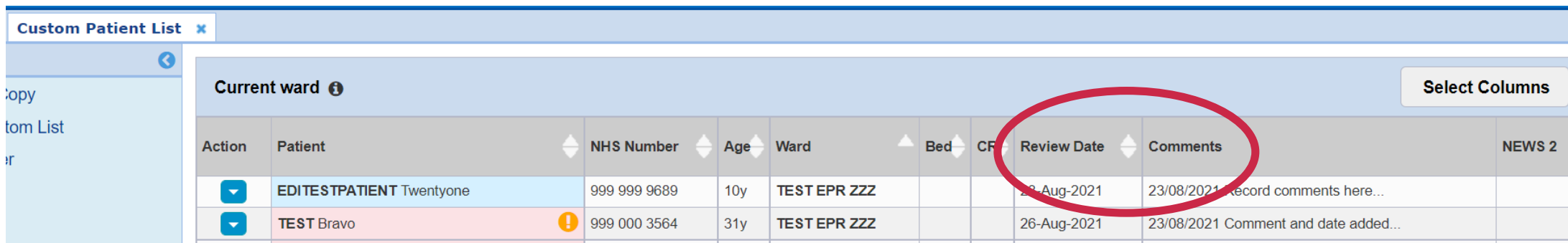
For further information please contact: leedsth-tr.ImplementationTeam@nhs.net or call 0113 20 (60599)



Important Information for All Custom Patient List Users



Please be aware that any information recorded in the **Comments** and **Review Date** columns of a Custom Patient List is not automatically deleted when the patient is removed from the list.

If the patient is added back onto that Custom Patient List at a later date, any historical information in those two columns will re-populate.



Action	Patient	NHS Number	Age	Ward	Bed	CF	Review Date	Comments	NEWS 2
	EDITESTPATIENT Twentyone	999 999 9689	10y	TEST EPR ZZZ			28-Aug-2021	23/08/2021 record comments here...	
	TEST Bravo	999 000 3564	31y	TEST EPR ZZZ			26-Aug-2021	23/08/2021 Comment and date added...	

To mitigate the potential clinical risk, it is advised that information recorded in the **Comments** and / or **Review Date** column is either:

Dated if the information is required to re-populate

or

Deleted PRIOR TO removing the patient from the list.

For further information please contact: leedsth-tr.ImplementationTeam@nhs.net or call 0113 20 (60599)

Useful contacts

Please contact the **Implementation Team** for **Digital Support & Training** on PPM+ functionalities.

Ext: 60599

leedsth-tr.ImplementationTeam@nhs.net

Please contact the Informatics Service Desk at x26655 or visit the portal at <https://lth-dwp.onbmc.com/> to:

- Reset your password.
- Report a problem you are having within PPM+ functionality.
- Report a data quality problem within PPM+.
- Request new user accounts for PPM+.
- Disable PPM+ accounts for any leavers from your department.

Please contact the **PPM+ EHR team** at leedsth-tr.EPR@nhs.net if you have any development ideas or comments on your experience of using the EHR.

If you would like to make a **request for change to PPM+**, please contact us at: leedsth-tr.EPR@nhs.net with a completed **Request For Change (RFC)** form available here.

Please contact the **IT Training Department** at ITTraining.LTHT@nhs.net if you require further training on PPM+ or any other Clinical System.

PPM+ Help Site: <https://www.ppmsupport.leedsth.nhs.uk/>

For further information please contact: leedsth-tr.ImplementationTeam@nhs.net or call 0113 20 (60599)