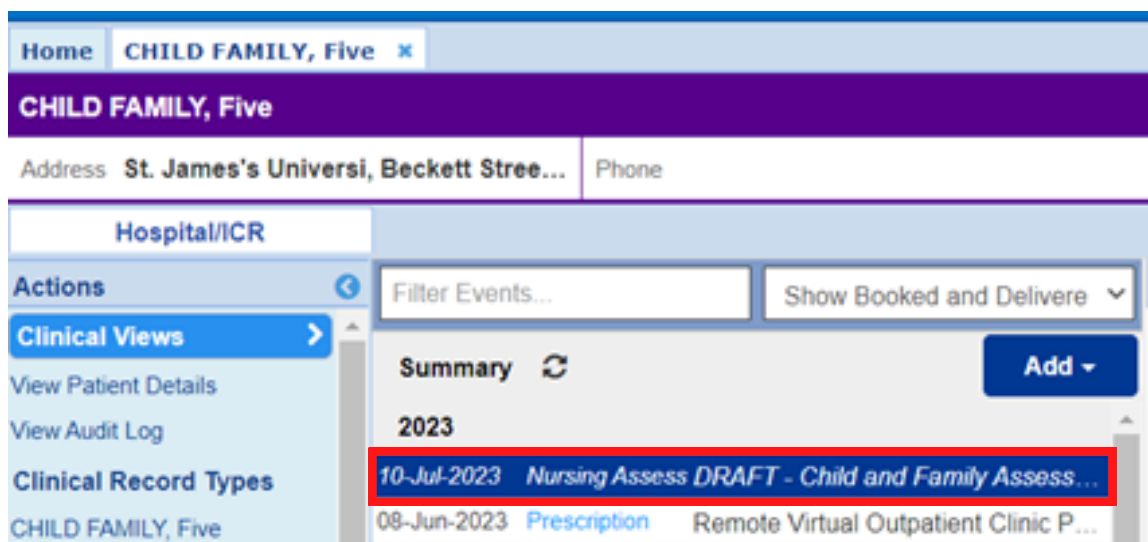


Drafts Now Showing in the Events Summary

User Guide

- 1 PPM+ Drafts are now visible in the Events Summary. Please note, the entry is displayed in *italics* and now prefixed by Draft.



- 2 You can **View**, **Edit** or **Discard** a Draft when using the Edit screen. You will still be able to access or edit drafts via the '**In Progress**' section of '**Add > Clinical Document**'.



Important:

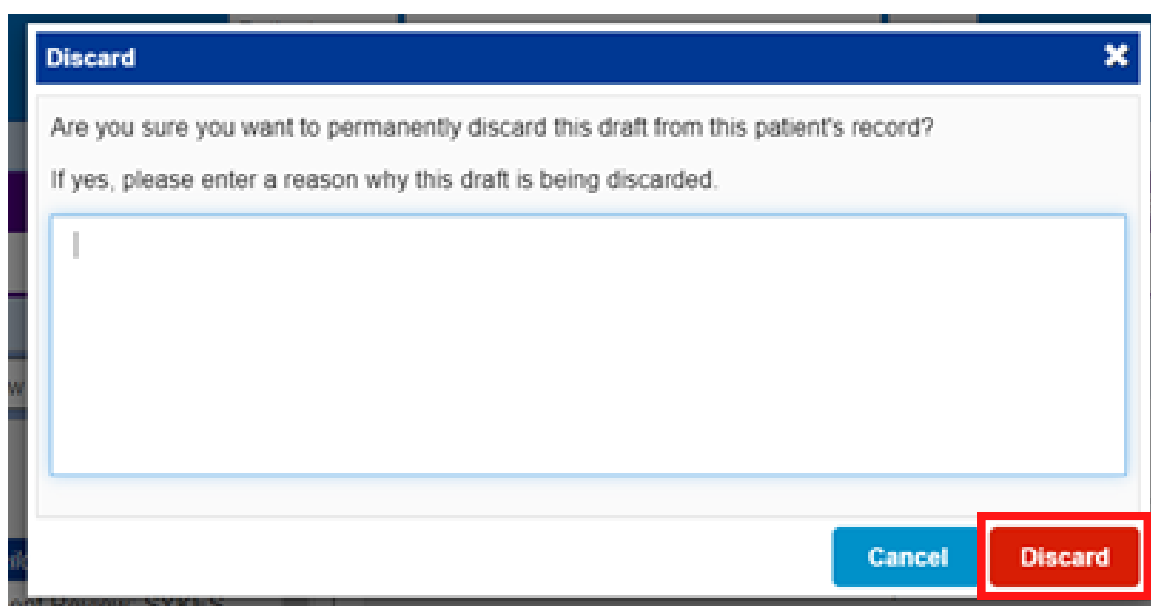
Please note that from **21st August 2023**, the **Save Draft functionality will be removed** from Clinical Note and Free Text Annotation.

To Discard a Draft

- 1 To Discard a Draft select '**Discard**'. Please note, this will delete the entire draft

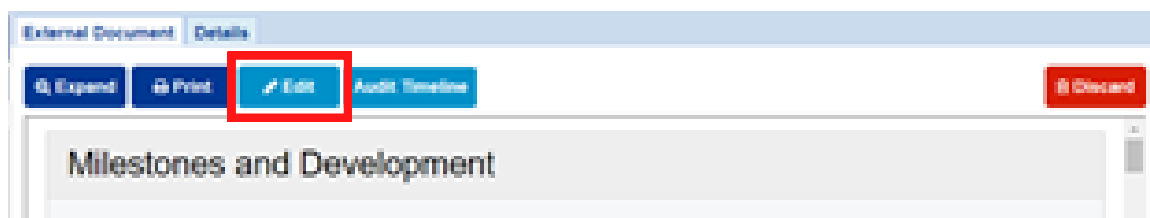


- 2 Then complete the reason in the pop up box and select '**Discard**'.



To Edit a Draft

- 1 Select '**Edit**'. Enter your changes.

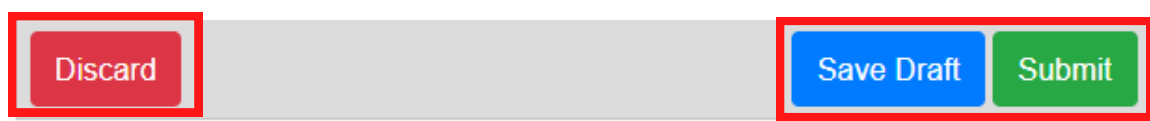


- 2 Select '**Save Draft**' when you have made changes but have further information to add before you want to submit the eForm.

Select '**Submit**' when you have completed the eForm.

You will also see an option to '**Discard**'.

Please be aware selecting "Discard" from this screen will delete the entire Draft not just any changes you have made.



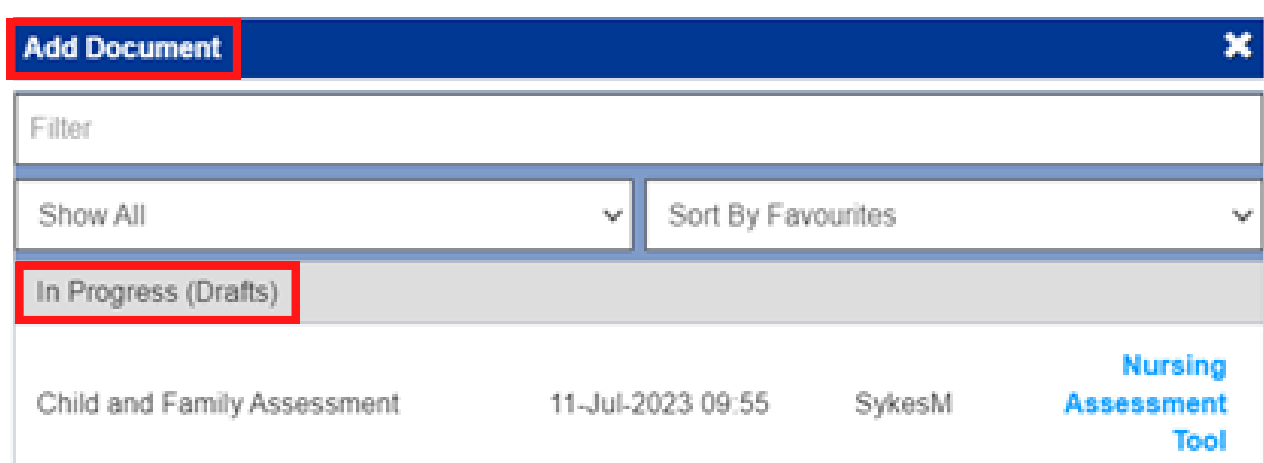
- 3 To close the form without saving any changes select the 'x' in the top righthand corner of the window.



Drafts Management from 'In Progress' section

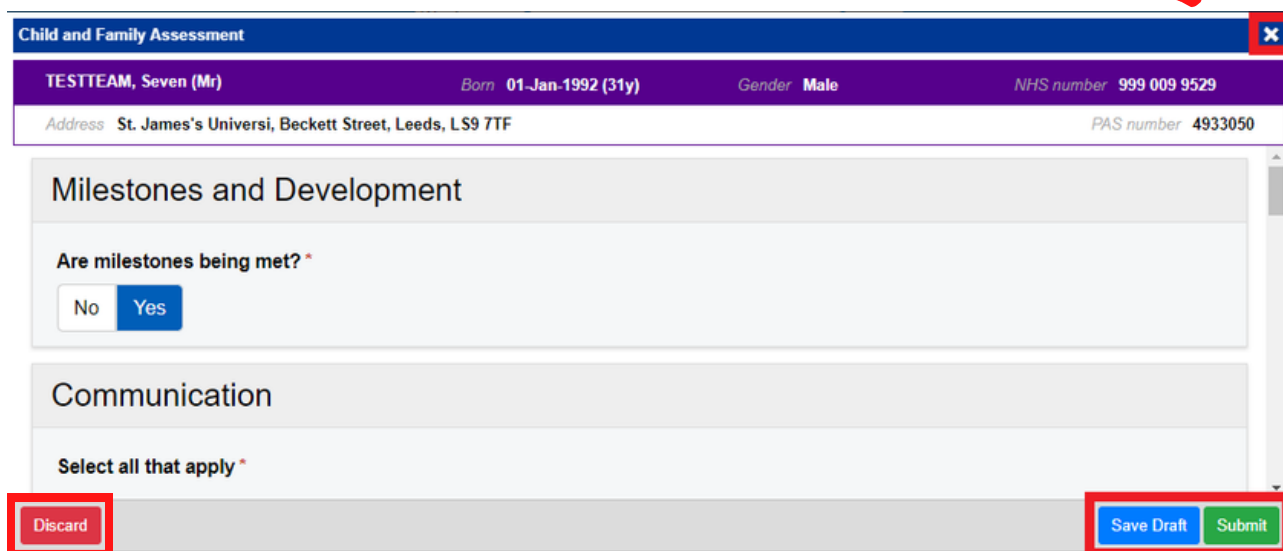
Drafts will also continue to be accessible via the 'In Progress' section of 'Add Clinical Document' from PPM+ Desktop and the 'In Progress' option in eForms in PPM+ Mobile App.

Please note existing Drafts and Drafts for a small subset of forms will only be accessible from the 'In Progress' Section. Opening a Draft via this route opens the form directly into the Edit screen.



The screenshot shows a window titled 'Add Document' with a close button (X) in the top right corner. Below the title bar is a 'Filter' input field. Underneath are two dropdown menus: 'Show All' and 'Sort By Favourites'. A section titled 'In Progress (Drafts)' is highlighted with a red box. Below this, a table lists documents. The first row shows 'Child and Family Assessment' with a date of '11-Jul-2023 09:55', a user 'SykesM', and a link to the 'Nursing Assessment Tool'.

Use the 'X' at the top of the window to close the Draft without saving any changes you have made to it.



The screenshot shows the 'Child and Family Assessment' form. At the top, there's a patient summary bar with details like 'TESTTEAM, Seven (Mr)', 'Born 01-Jan-1992 (31y)', 'Gender Male', 'NHS number 999 009 9529', and 'Address St. James's Universi, Beckett Street, Leeds, LS9 7TF'. Below this, the form has sections for 'Milestones and Development' and 'Communication'. At the bottom, there are three buttons: 'Discard', 'Save Draft', and 'Submit'. The 'Discard' button is highlighted with a red box, and red arrows point from the text below to it and the other two buttons.

Select 'Discard' to Delete the Draft. Please note this will delete the entire Draft not just any changes.

Select 'Save Draft' when you have made changes but have further information to add before you want to submit the eForm.

Select 'Submit' when you have completed the eform.