#LeedsDigitalWay
CONNECTS • TRANSFORMS • IMPROVES

NHS
The Leeds Teaching Hospitals
NHS Trust

Specialist Referrals

User Guide ppm+

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

Specialist Referrals User Guide

Contents Page

Making a Specialist Referral

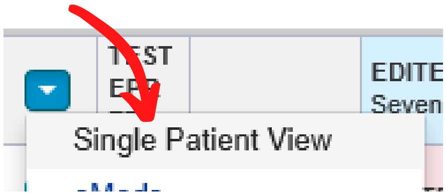
Reviewing a Specialist Referral

Making a Specialist Referral

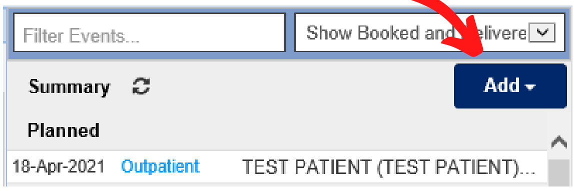
How to add a Specialist Referral

1 Go into **'Single Patient View'** and select your patient, then on the left click the **'Add'** button drop down.

Single Patient View

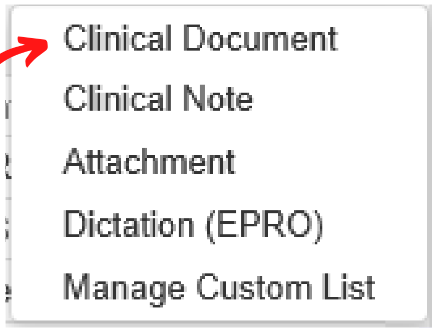


Add Drop down



2 Click the **'Clinical Document'** option in the drop down menu.

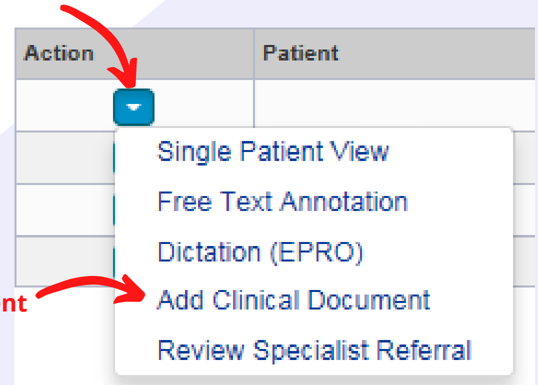
Clinical Document



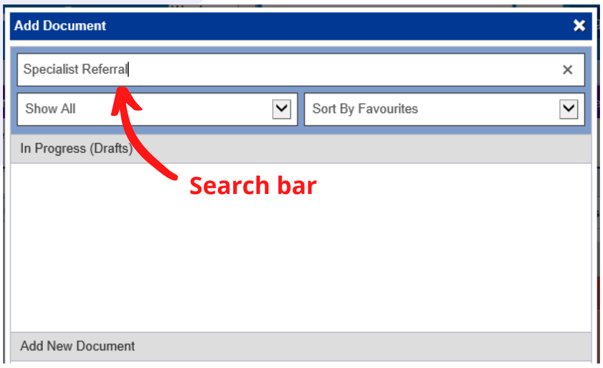
3 You can also do this from your ward view by clicking the **'Action'** button and then clicking **'Add Clinical Document'**.

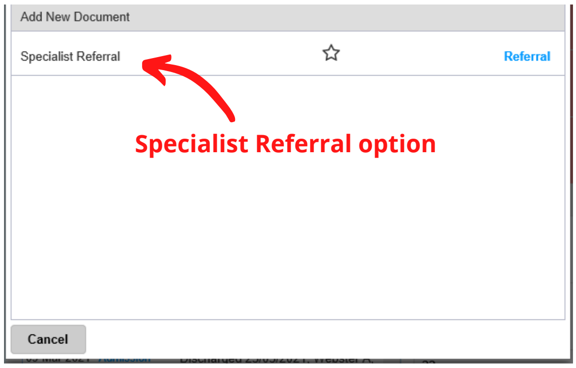
Action Button

Add Clinical Document



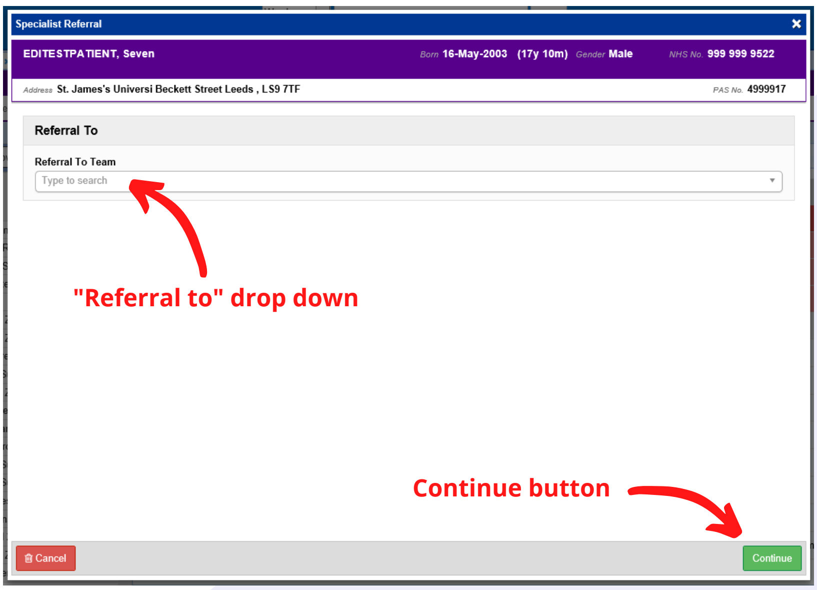
4 Search for **'Specialist Referral'** in the filter section at the top or scroll to find the eform you require.





5 You can favourite a specialist referral option by selecting the **star** in the centre and once favourited it will appear at the top of your list.

6 Once you click on Specialist Referrals, this form will be presented. Search for the team you want to refer to and the teams will appear to choose from. Once selected click **'continue'** this will load the referral form for that service and team.

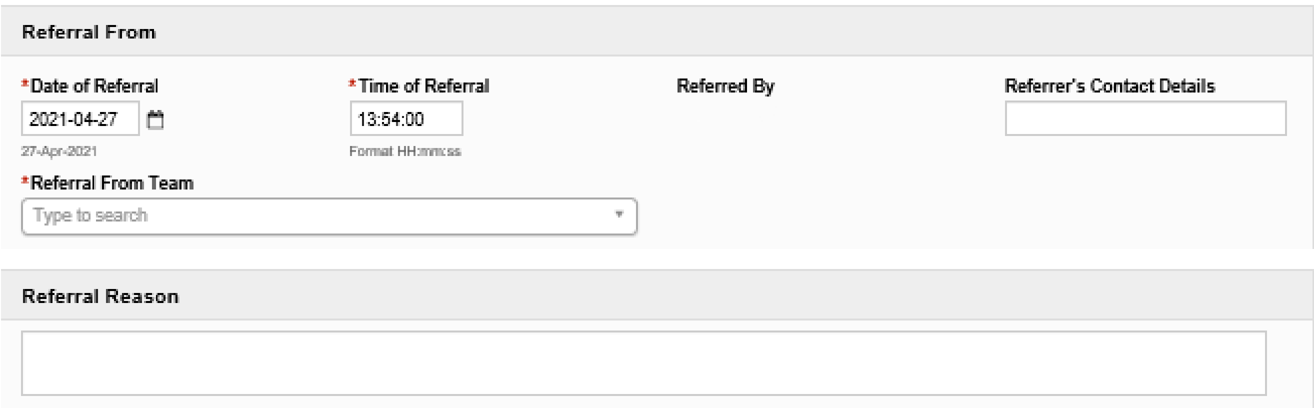


7 Next you will need to fill of the **'Referral From'** form. See below the screenshot for the generic fields in every referral request form and the details of filling it out:

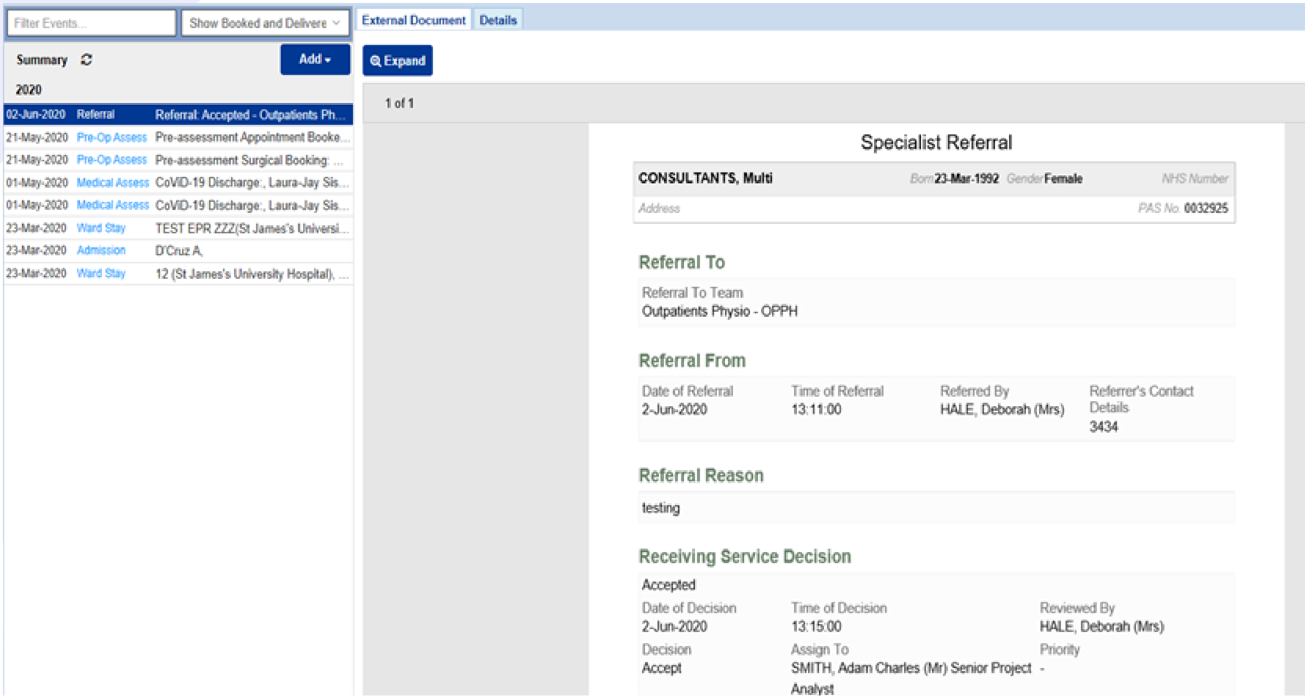
- Those with a **red *** are required fields.
- The date and time will auto populate.
- The **'Referred By'** option will auto populate with the users name.
- The **'Referrer's Contact Details'** is an optional box for your referrers contact details.
- In the **'Referral From Team'** search for your team/ward and select the appropriate option from the list.

(Your team will only be selectable if it has been created in ppm+)

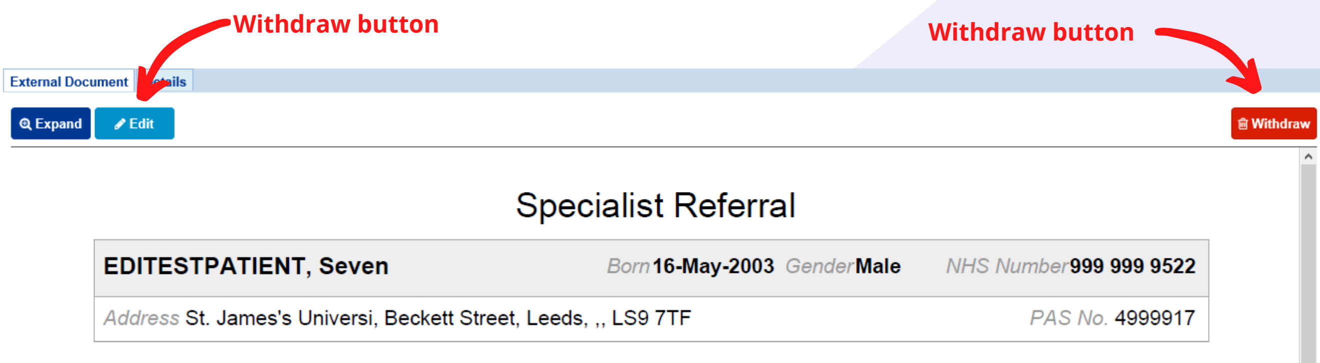
- The **'Referral Reason'** is an open text box in which each team will require certain information to be documented. Please liaise with the appropriate team for this information.



8 Once submitted, a copy of the referral is saved in the patients Single Patient View. This referral document is updated when any changes or comments that are made during the review process.



9 Once you have requested your referral, if it is still in the requested stage i.e. not been accepted or declined you can edit or withdraw that referral. *(The edit and withdraw options will no longer be available once the referral has progressed past the requested stage)*



#LeedsDigitalWay
CONNECTS • TRANSFORMS • IMPROVES

NHS
The Leeds Teaching Hospitals
NHS Trust

eWhiteboards and Multi Patient View

1 You can view the status of a Specialist Referral for inpatients on your **eWhiteboard** and as a selected column in your **Multi Patient View.**

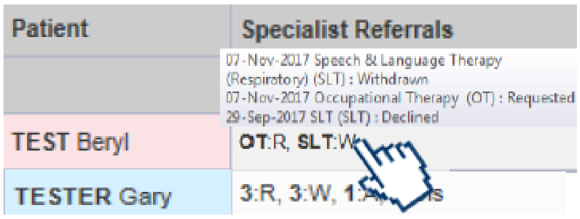
Patient	Specialist Referrals
TEST Beryl	OT:Dis, SLT:R, SLT:Dis, OT:W

2 If there are a number of referrals the Team abbreviation will be replaced by a **number** indicating the number of referrals in that status.

Patient	Specialist Referrals
TESTER Gary	3:R, 3:W, 1:A, 1:Dis

Number

3 In your **Multi Patient View** you can hover over the information in the column to see further details.



eWhiteboard/MPV Abbreviations

An acronym of the team referred to is followed by the status of the referral. The status can be identified by using the key to the right.

R = Requested

W = Withdrawn

S = Seen

A = Accepted

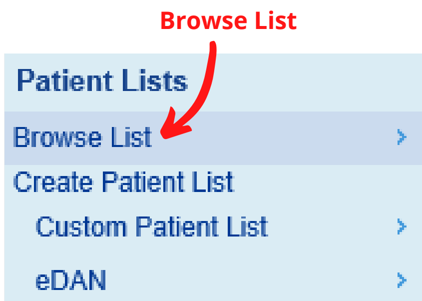
Dec = Declined

Dis = Discharged

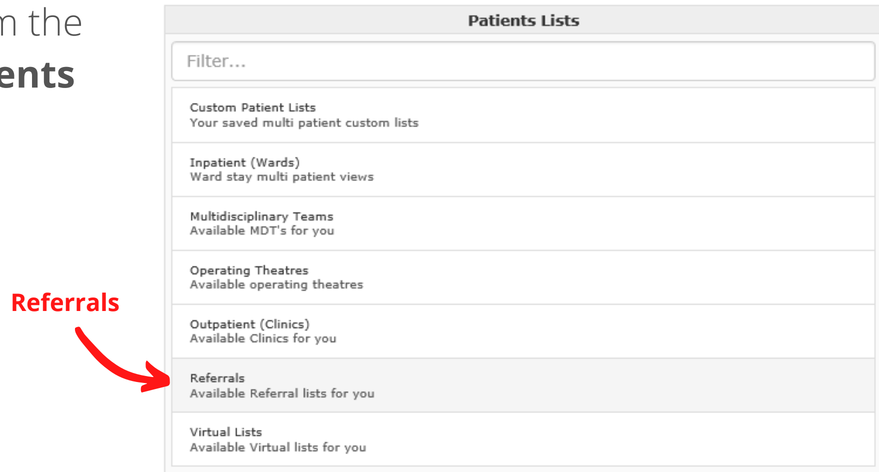
RD = Redirected

Finding your teams Specialist Referrals List

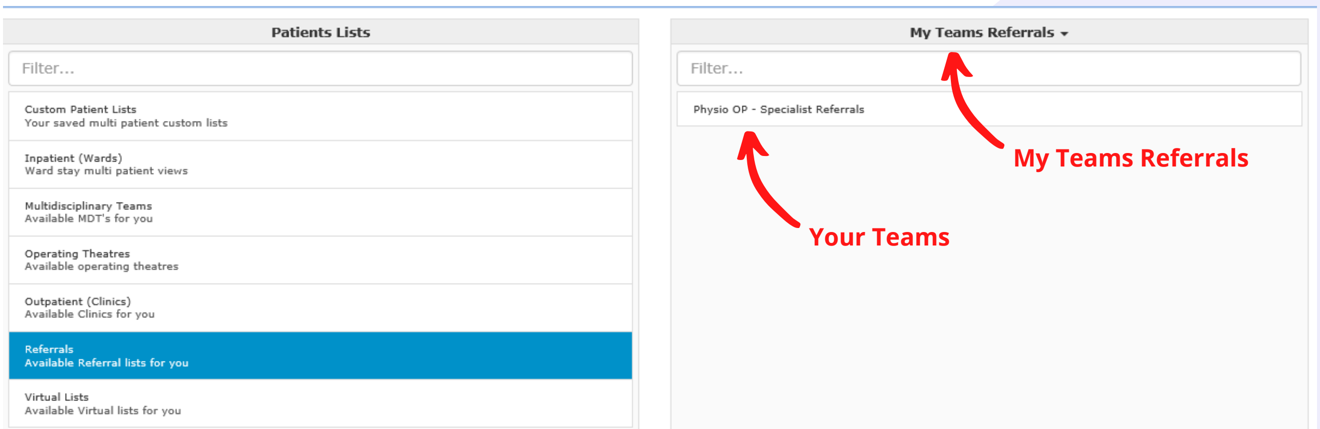
1 First find your teams specialist referrals list by clicking **'Browse List'** from the homepage of ppm+.



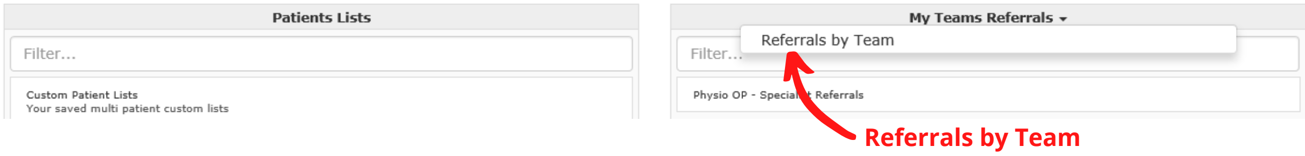
2 Click '**Referrals**' from the options on the **'Patients Lists'** selection.



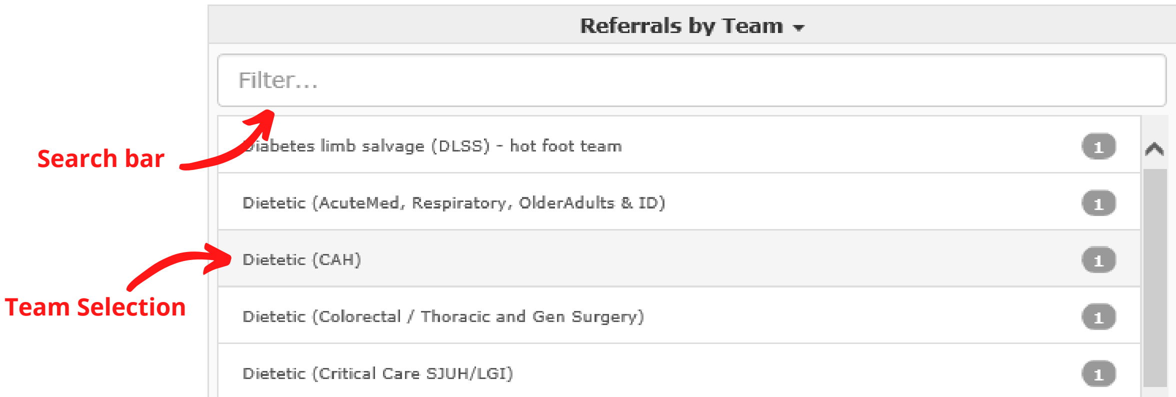
3 If you are already in a team it should automatically load the **'My Teams Referrals'** list with your team in the list.



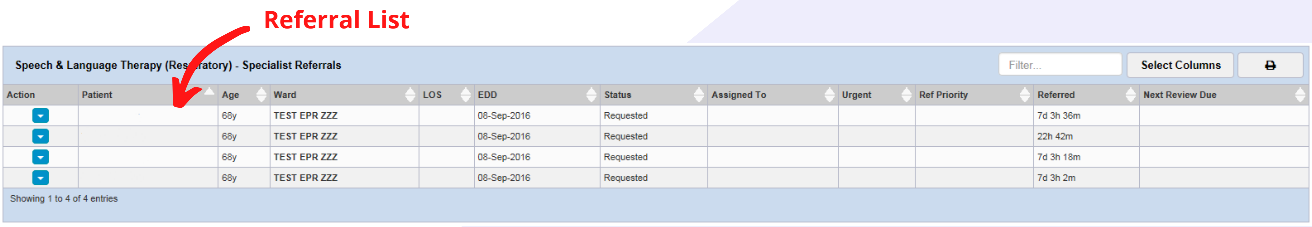
4 If you click on the drop down arrow on **'My Teams Referrals'** you can then switch to **'Referrals by Team'** to view teams you are not a part of. You will have view only access to all the teams but and can only review the teams you are a full member of.



5 If **'Referrals by Team'** is automatically displayed when you first load up you will not be a part of any teams and will need to be request to be added into your team.

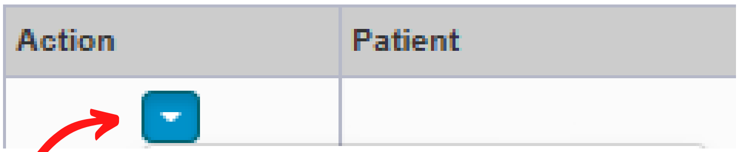


6 Once you have selected your team from the list, you will then see your teams referrals page.



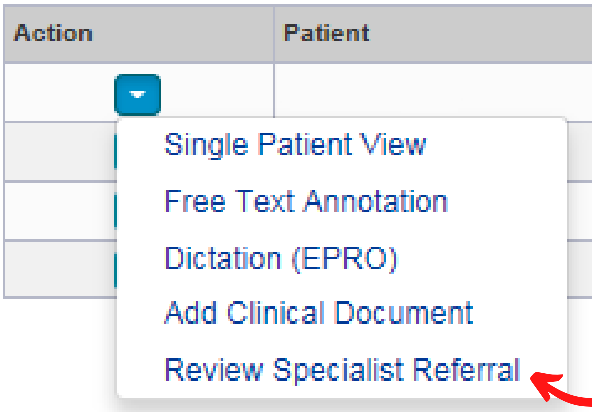
Reviewing a Specialist Referral

1 First click the blue button with the white arrow in the **'Actions'** column for your desired patient.



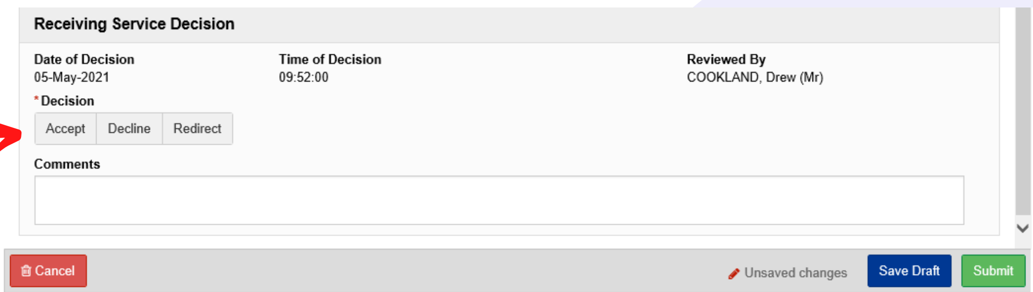
Blue Button

2 Click **'Review Specialist Referral'** from the drop down list.



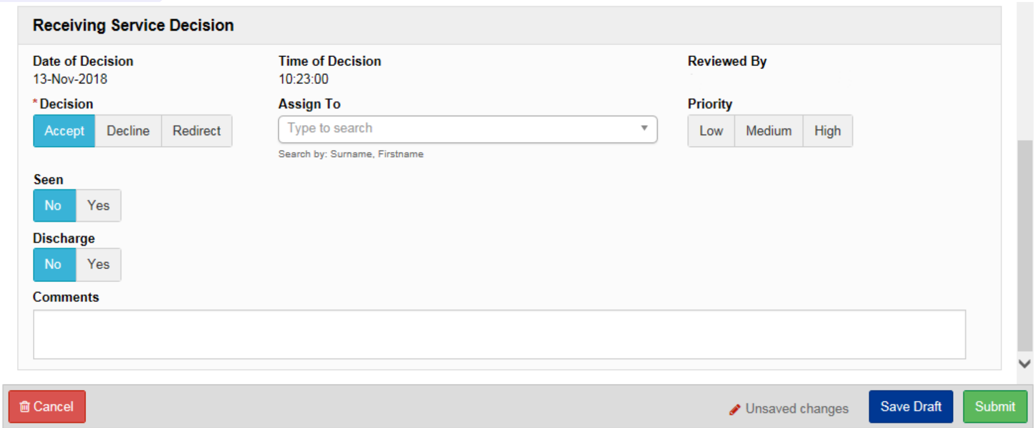
Review Specialist Referral option

3 Once the form opens you can either **'Accept'**, **'Decline'** or **'Redirect'** the referral as well as add comments.



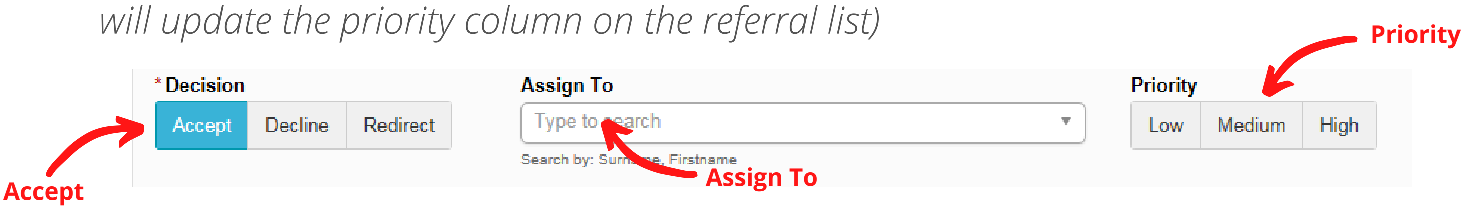
Accept, Decline or Redirect

4 If you select **'Accept'** extra options will appear.



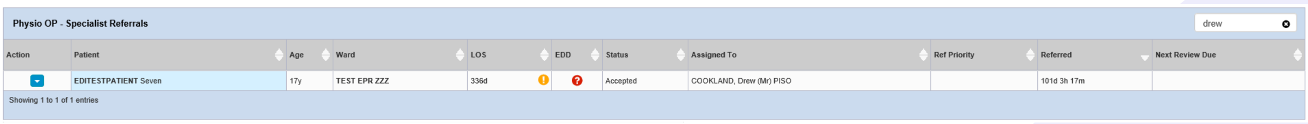
5 When you select **'Accept'** you will have the optional **'Assign To'** and **'Priority'** sections appear.

*(The **'Priority'** option allows you to select **'Low'**, **'Medium'** or **'High'** priority which will update the priority column on the referral list)*



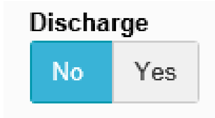
*(**'Assign To'** allows you to assign a member of the team to that patient, this will update the **'Assign To'** column on your referral list)*

If you assign a member of the team to the patient you can then filter to their list of patients back on the teams referrals page. The teams referrals page can be sorted in order of any column via the arrows in the column headers

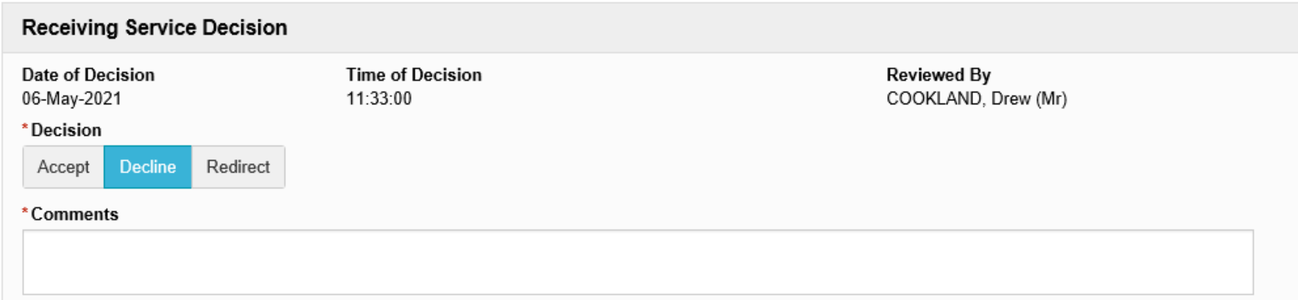


6 In the **'Seen'** section if you select **'Yes'** more options appear, the **'date seen'** and **'time seen'** boxes are mandatory and will auto populate but can be changed if necessary, you can input the **'Next Review Date'** but it is not mandatory.

7 The **'Discharge'** option is a simple Yes/No answer and does not produce further fields to fill out. If you select Yes and complete the form the patient will be removed from your referrals list.


Discharge
No | Yes

8 If you select **'Decline'** the **'Comments'** box becomes mandatory but no extra options will appear. Please state the reason for Declining in the comments box.


Receiving Service Decision

Date of Decision
06-May-2021

Time of Decision
11:33:00

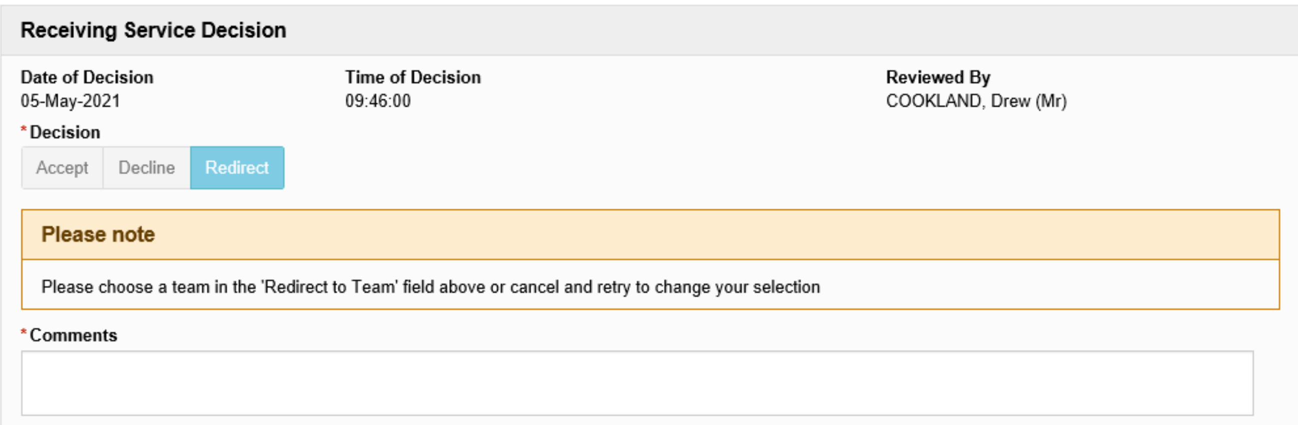
Reviewed By
COOKLAND, Drew (Mr)

*Decision
Accept | Decline | Redirect

*Comments

9 If you select **'Redirect'** beneath the **'Decision'** option a notice will appear advising on where to go next.

(You can only redirect a referral at the point of request, once accepted by a team it can no longer be redirected)


Receiving Service Decision

Date of Decision
05-May-2021

Time of Decision
09:46:00

Reviewed By
COOKLAND, Drew (Mr)

*Decision
Accept | Decline | Redirect

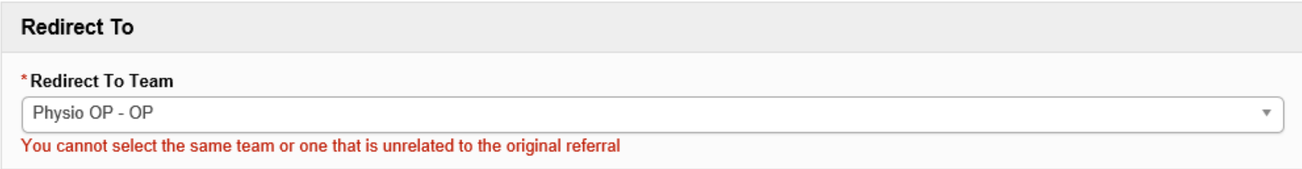
Please note

Please choose a team in the 'Redirect to Team' field above or cancel and retry to change your selection

*Comments

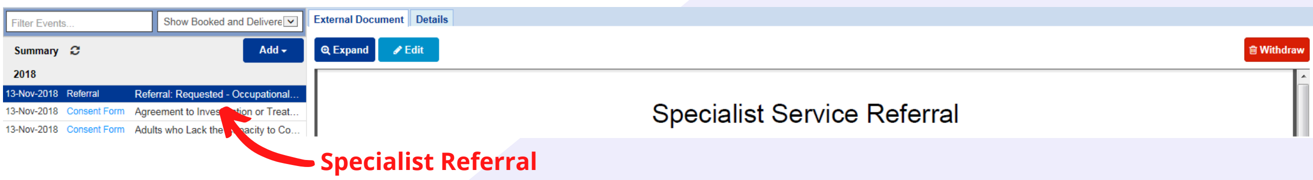
10 If you follow the notice instructions you will scroll up to the top of the page and choose a team in the **'Redirect to Team'** field in order to move forward with the redirection.

(You can only redirect to teams within the same service)



11 Once all required fields are correctly filled out you can select **'Submit'** or you can select **'Save Draft'** if you aren't quite finished and need to come back to it later.

12 Once a referral has been submitted you will be able to view the updated referral in the **'Single Patient View'** and the updated status in the **'eWhiteboard Column'** and the **'Referral List'**.

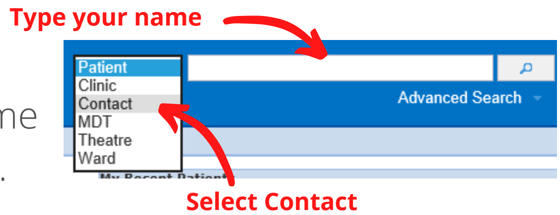


Adding members to your team

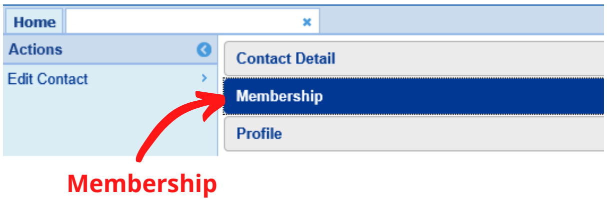
Disclaimer

Only current team members can add other users to the team, you can not add yourself to a team.

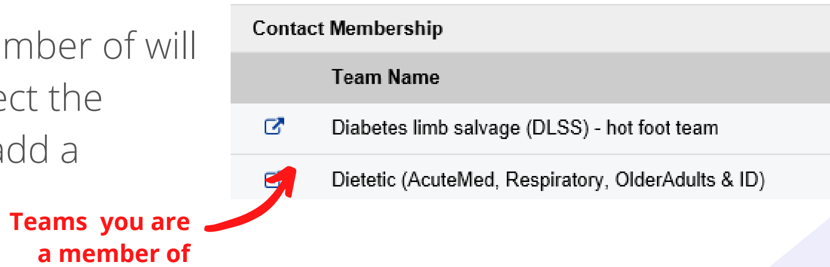
1 On the homepage use the drop down to select **'Contact'** and search for your name as it displays in your contact information.



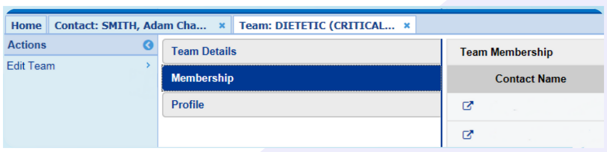
2 Your contact information will appear in a new tab. Select the second option **'Membership'**.



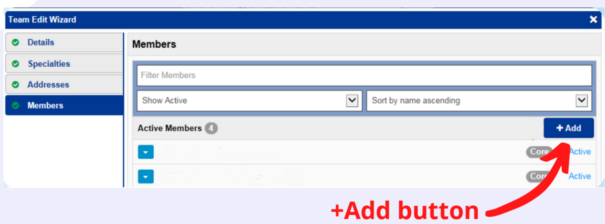
3 The teams you are a member of will display on the right. Select the team you would like to add a member to.



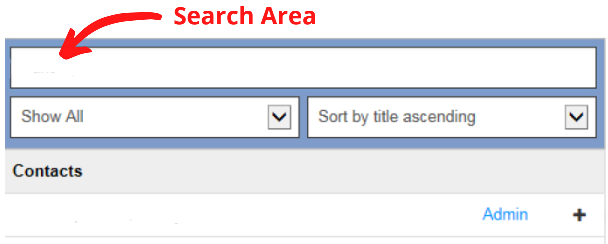
4 The Team tab will appear and be automatically selected. Select the option **'Membership'**. Select **'Edit Team'** from the Actions column on the left.



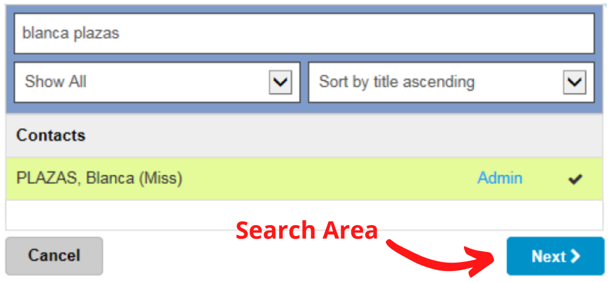
5 The Team Edit Wizard pop up will appear. Click on **'+Add'**.



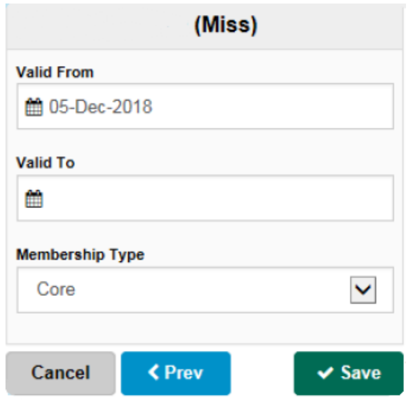
6 Search for the colleague you want to add to the team. Click on the **'+'** next to their name in the list.



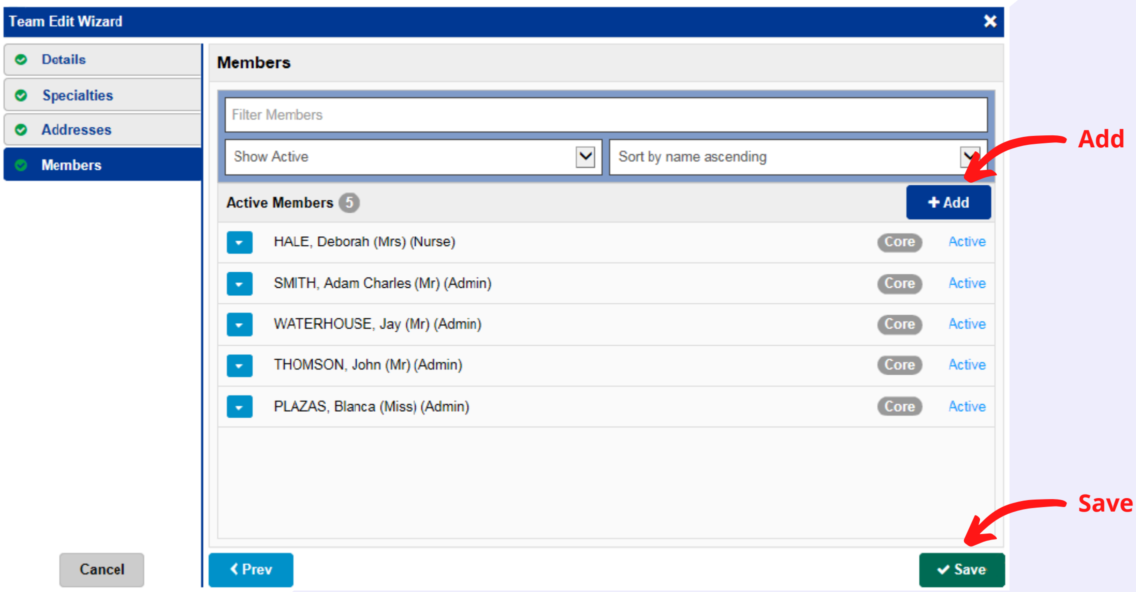
7 The individual will be highlighted and the **'+'** will turn in to a tick. Click on **'Next'** in the bottom right corner.



8 In the next pop up, leave **'Valid To'** blank and click **'Save'** in the bottom right corner.



9 You will now see your selected colleague in the members list. You can add more colleagues by clicking **'+Add'** and repeating the steps. Once complete remember to click **'Save'** in the bottom right.



Useful contacts

Please contact the **Implementation Team** for **Digital support & Training:** Handover, Specialist Referrals, PPM+ Mobile, e-Obs, PAWS...

Ext: 60599
leedsth-tr.ImplementationTeam@nhs.net

Please contact the **Informatics Service Desk** at **x26655** or **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/**