



The Leeds  
Teaching Hospitals  
NHS Trust

ppm+

# Clinical Genetics

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES

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## How To Create and Edit a Contact

**The Clinical Genetics Functionality within PPM+ requires all users to have their Address, Speciality and their Clinical Genetics Team/Teams recorded in their PPM+ Contact.**

**Please see the Create a Contact User Guide to see further information on how to Create and edit/update your PPM+ Contact .**

**Please [Click Here](#) to view the User Guide.**

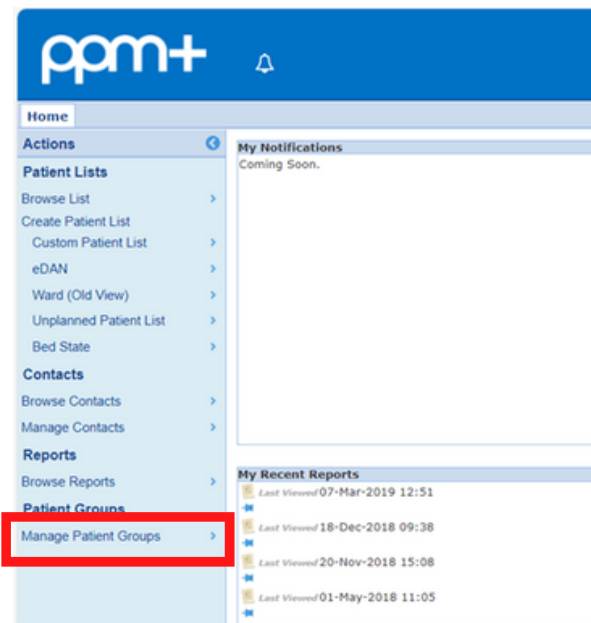


# Creating a Leeds Clinical Genetics(LCG) Patient Group

Please note, before creating a **LCG Patient Group**, **ALWAYS** check in the **patient's record** that they haven't already been **assigned to a LCG group**. For further information on viewing a patient's LCG number see **Viewing a Patient's LCG Patient Group section**.

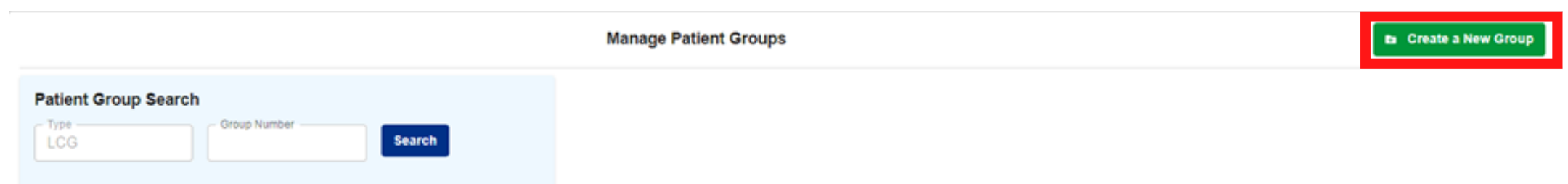
1

To create a **LCG Patient Group**, from the left hand side panel, **Select Manage Patient Groups**.



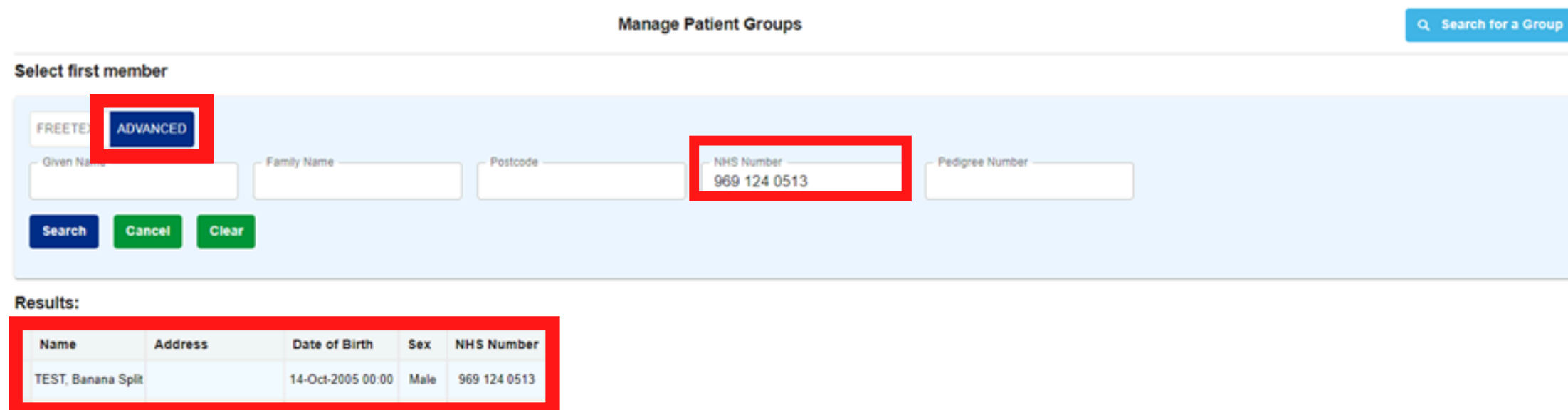
2

Select **Create a New Group**.



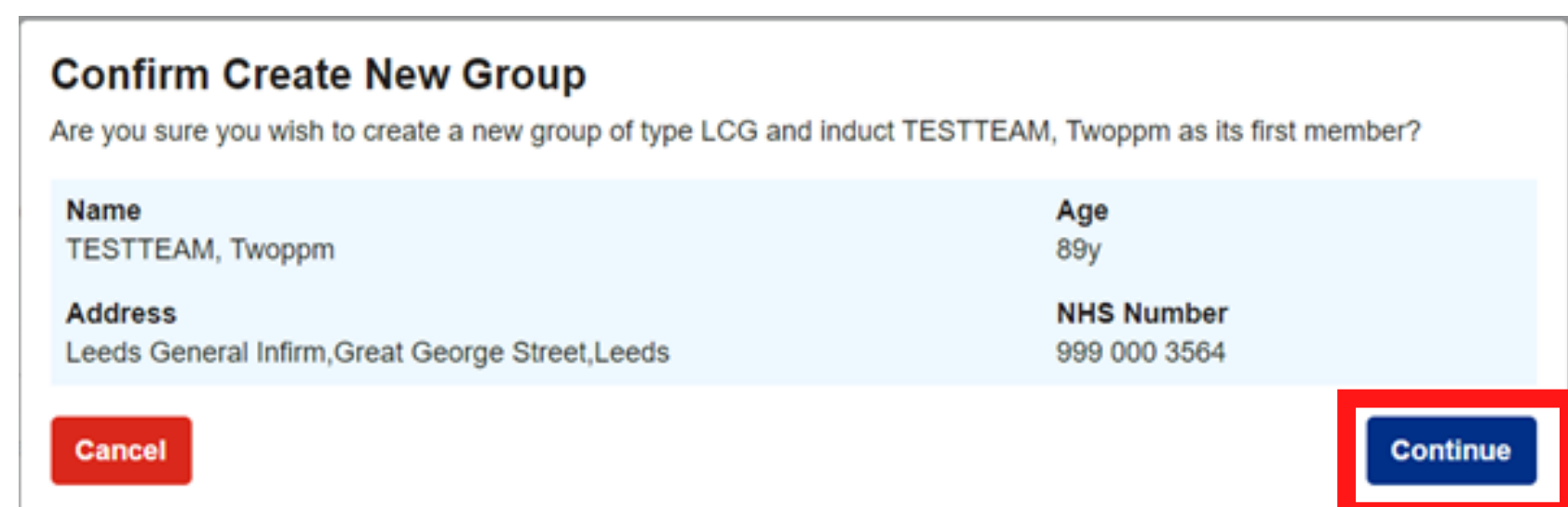
3

Select **The Advanced Tab**, enter the **Patient's NHS Number** and click **Search**. Then Select the **Patient**.



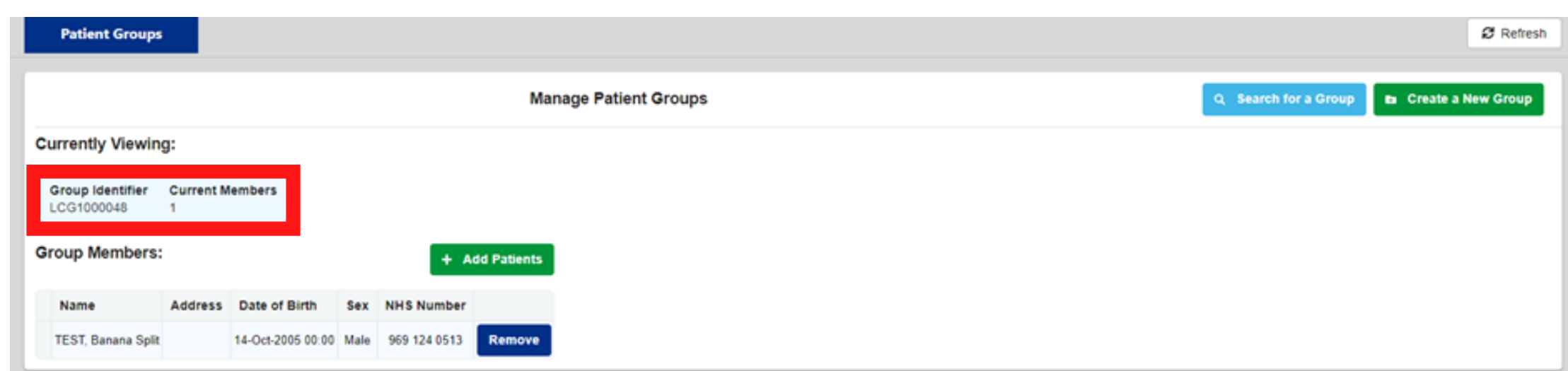
4

You will be presented with a box asking you to confirm you wish to create a new group of type LCG and add your patient as the first member? **If correct, select Continue.**



5

The Patient Has now been **Assigned a Group**.

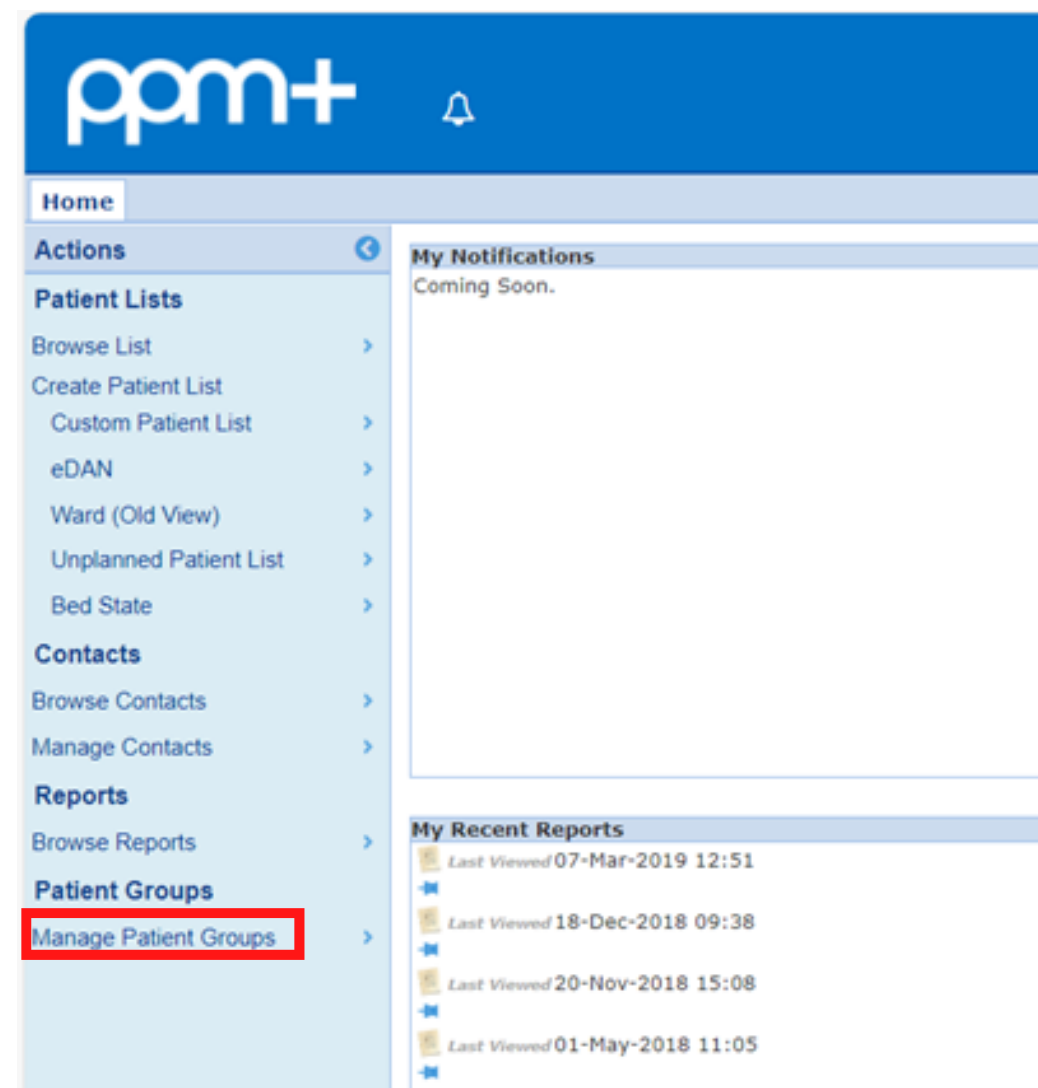




# Adding an Additional Patient to a Leeds Clinical Genetics (LCG) Patient Group

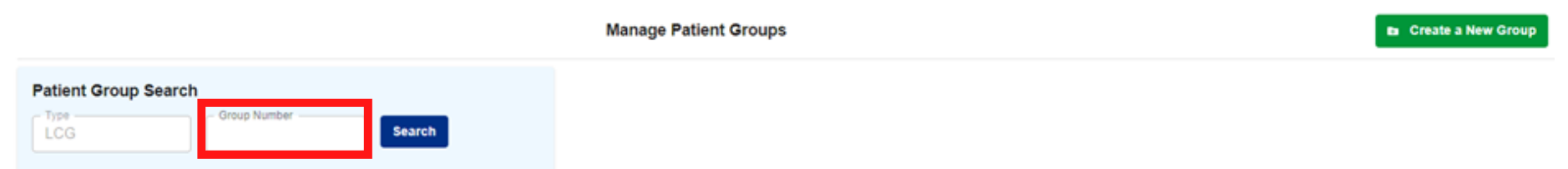
1

On the **PPM+ Homepage**, On the left hand side panel **Select Manage Patient Groups**.



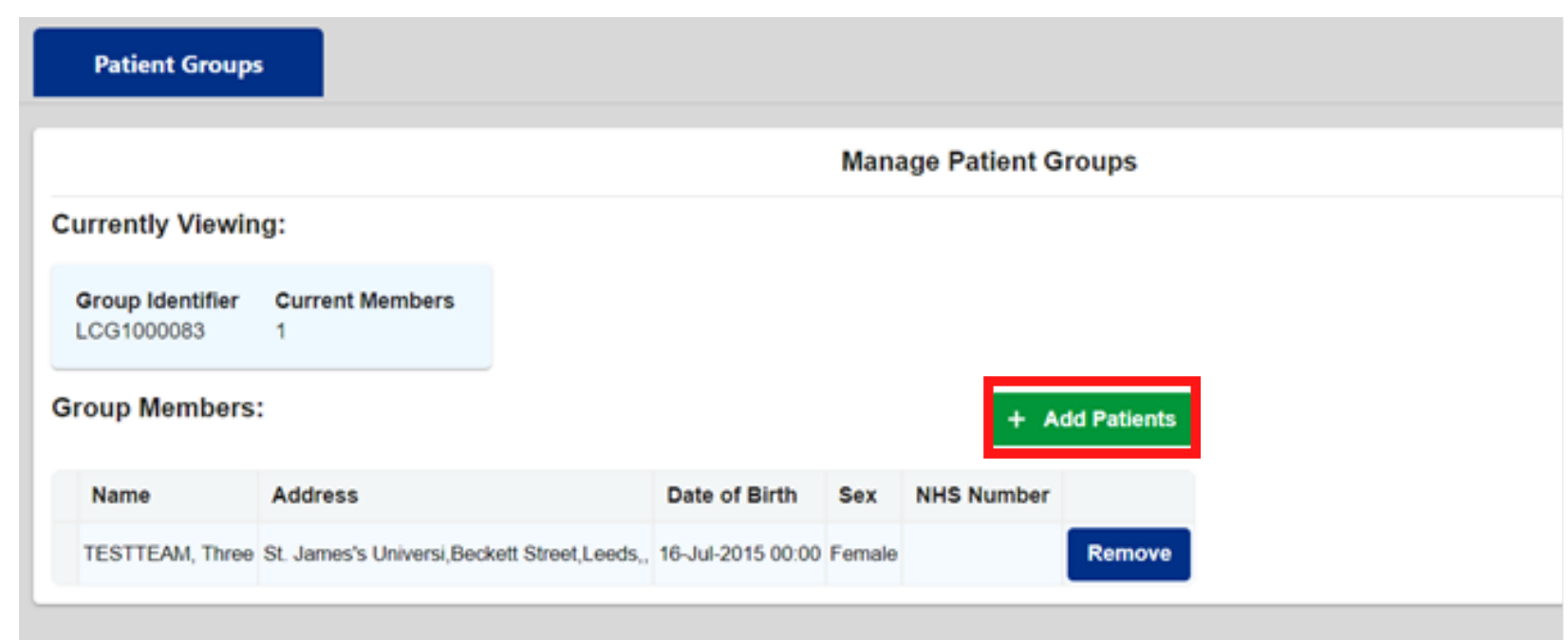
2

In the **Patient Group Search** field enter the **LCG Patient Group Number**, then click on **Search**.



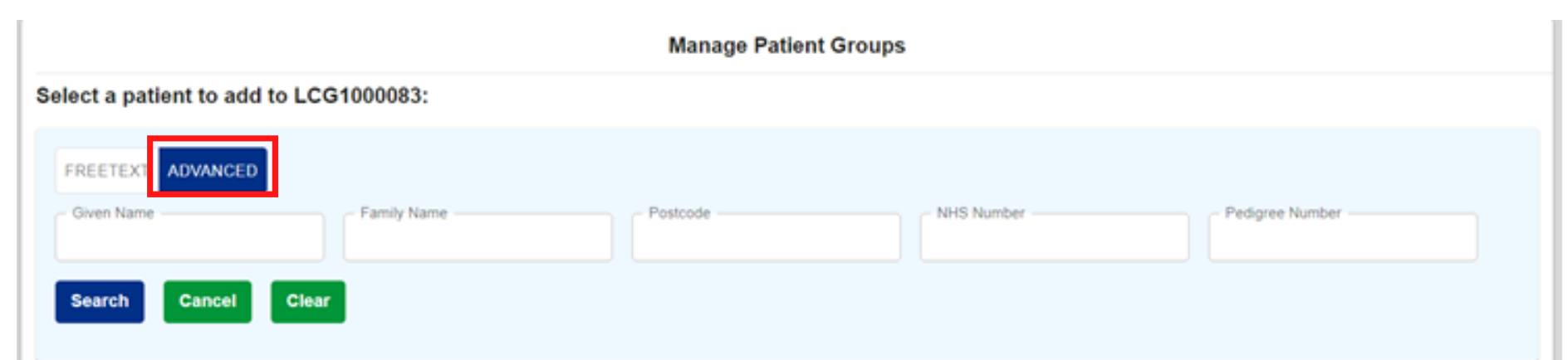
3

You will now see the **Patient Groups** form. Click on **Add Patients**.



4

Click on the **Advance Tab**.



5

On the **Advance Tab**, You can enter the **Given Name, Family Name, Postcode and/or NHS Number** of the patient you want to **Add** to the **LCG Patient Group**. Once entered, **Click on search**, Then select the relevant patient from the results below.

6

**Select the relevant patient.** You will then be presented with a box asking you to confirm you wish to **Add** the patient to the group LCGxxxxxxx. **If correct, select Continue.**

7

The patient has now been **added** to the **LCG Patient Group**.

8

You can also add an additional patient to an existing **LCG Patient Group** from the **Single Patient View**, **Click on the Arrow** at the righthand side of the patients demographic banner.

6

Manage Patient Groups

Select a patient to add to LCG1000022:

FREETEXT ADVANCED

Given Name Family Name Postcode NHS Number 959 361 7434 Pedigree Number

Search Cancel Clear

Results:

Name	Address	Date of Birth	Gender	NHS Number
TESTC, Mica	Leeds Sfsdssssssss, Richmond Hill Abcde, LS9 8NP Sdffffffe	21-Aug-2019 00:00	Female	959 361 7434

Confirm Add Patient

Are you sure you wish to add the following patient to group LCG1000022?

Name: TESTC, Mica Age: 4y 0m

Address: Leeds Sfsdssssssss, Richmond Hill Abcde, LS9 8NP Sdffffffe NHS Number: 959 361 7434

Cancel Continue

1 of 1

Patient Groups x

Patient Groups

Manage Patient Groups

Currently Viewing:

Group Identifier	Current Members
LCG1000084	2

Group Members:

+ Add Patients

Name	Address	Date of Birth	Sex	NHS Number	
AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove
TESTTEAM, Twopm	Leeds General Infirm, Great George Street, Leeds,	11-May-1934 00:00	Female	999 000 3564	Remove

ppm+

Patient

Advanced Search

Sign Out

LEEDS CARE RECORD

Home AUTOMATION, One

AUTOMATION, One

Current Location TEST EPR ZZZ Born 19-Sep-1971 (52y) Sex Male NHS No 999 000 3351

Address Phone GP PAS No 9030945 Allergies: see GP tab or eMeds



9

Click on the **patient's LCG Number**.

Phone	GP	PAS No: 9030945	Allergies: see GP tab or eMeds
Other Phone Numbers	GP Details <a href="#">View full GP Details</a>	Other Identifiers PAS: 9030945 SMS: 900031125	
		Patient Groups LCG: 1000084	

10

You will now see the **Patient Groups** form. Click on **Add Patients**.

Patient Groups

Manage Patient Groups

Currently Viewing:

Group Identifier	Current Members
LCG1000083	1

Group Members:

Name	Address	Date of Birth	Sex	NHS Number	
TESTTEAM, Three	St. James's Universi, Beckett Street, Leeds, ,	16-Jul-2015 00:00	Female		Remove

+ Add Patients

11

Click on the **Advanced Tab**.

Manage Patient Groups

Select a patient to add to LCG1000083:

FREETEXT

ADVANCED

Given Name

Family Name

Postcode

NHS Number

Pedigree Number

Search

Cancel

Clear

12

Enter the **Given Name, Family Name, Postcode and /or NHS Number** of the patient you want to add to the **LCG Patient Group**. Then **Click on Search and Select the required patient** from the results below.

Manage Patient Groups

Select a patient to add to LCG1000022:

FREETEXT

ADVANCED

Given Name

Family Name

Postcode

NHS Number: 959 361 7434

Pedigree Number

Search

Cancel

Clear

13

You will then be asked if you are sure you wish to add the following patient to group LCGxxxxxx. If all information is correct, **Click on Continue**

Postcode

NHS Number

Pedigree Number

Confirm Add Patient

Are you sure you wish to add the following patient to group LCG1000022?

Name	Age
TESTC, Mica	4y 0m
Address	NHS Number
Leeds Sf9dddddde, Richmond Hill Abcde, LS9 8NP Sdmmme	959 361 7434

Cancel

Continue

14

The Patient has now been **Added** to the **LCG Patient Group**.

Patient Groups x

Patient Groups

Manage Patient Groups

Currently Viewing:

Group Identifier  
LCG1000084

Current Members  
2

Group Members:

+ Add Patients

Name	Address	Date of Birth	Sex	NHS Number	
AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove
TESTTEAM, Twoppm	Leeds General Infirm, Great George Street, Leeds, .	11-May-1934 00:00	Female	999 000 3564	Remove





# Removing a Patient from a Leeds Clinical Genetics (LCG) Patient Group

1

In the **Single Patient View** banner, **Select the Group Number.**

TESTC, Mica		Current Location 15 (S.JUH)		Born 21-Aug-2019 (4y)	Sex Female	NHS No. 959 361 7434
Address: Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS...	Phone	GP	PAS No. 9037263	Allergies: see GP tab or eMeds		
Usual Address: Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS9 8NP Sdfttdtdde, Skipton Dsttdtdtdde	Other Phone Numbers	GP Details: View full GP Details	Other Identifiers: AD3456, CASenole 9037263, PAS 900037442, SMS			
			<b>Patient Groups: LCG 1000083</b>			
			<a href="#">View Patient Group History</a>			

2

In the manage patient groups tab, **Click on the Remove button of the patient**, you wish to remove from the group.

Patient Groups					
Manage Patient Groups					
Currently Viewing:					
Group Identifier	Current Members				
LCG1000083	2				
Group Members: <a href="#">+ Add Patients</a>					
Name	Address	Date of Birth	Sex	NHS Number	
TESTC, Mica	Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS9 8NP Sdfttdtdde, Skipton Dsttdtdtdde	21-Aug-2019 00:00	Female	959 361 7434	<b>Remove</b>
TESTTEAM, Three	St. James's Universi, Beckett Street, Leeds,.	16-Jul-2015 00:00	Female		Remove

3

Then **Select Continue** to remove the patient.

## Confirm Remove Patient

Are you sure you wish to remove the following patient from group LCG1000033?

<b>Name</b> TESTC, Mica	<b>Age</b> 4y 0m
<b>Address</b> Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS9 8NP Sdfttdtdde, Skipton Dsttdtdtdde	<b>NHS Number</b> 959 361 7434

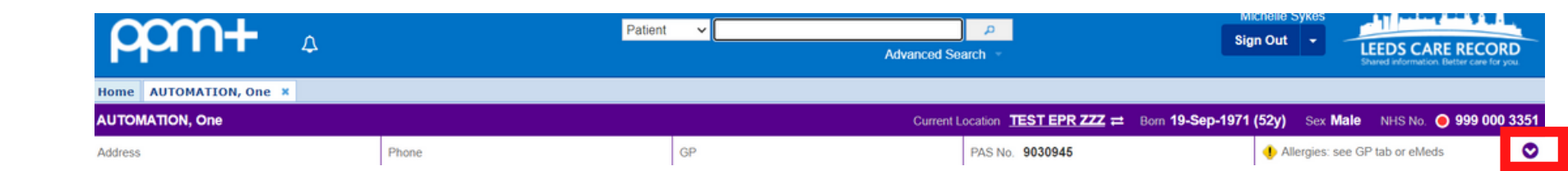
Cancel
Continue



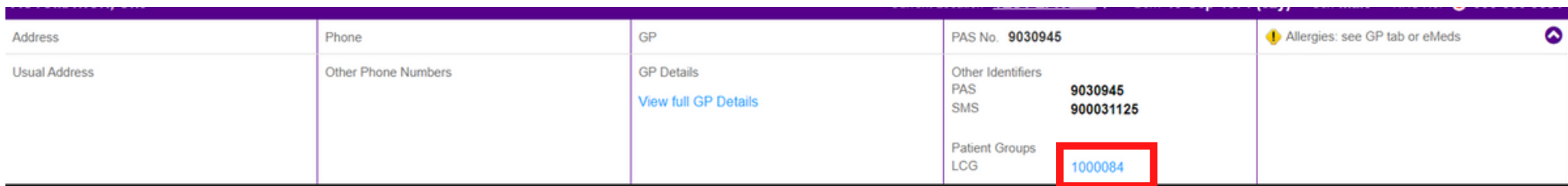
# Viewing a Patient's LCG Patient Group

Please note, Where a patient had an existing **Pedigree number created in Shire, these numbers have been copied across into PPM+.** The number will be unchanged but will be **prefixed with LCG and have zeros in front** for consistency with Patient Group numbers which are **always seven digits in length. LCG numbers created in PPM+ will start with LCG1.** Please be aware similar numbers may exist for completely separate families one starting LCG0 and the other starting LCG1.

**1** In the **Single Patient View,** Click on the **Arrow** at the righthand side of the patients demographics banner.



**2** In the **Patient Group Demographics Banner,** Select The Patient Group LCG Number.



**3** The **Patients LCG Patient Group** details will now show.

Patient Groups

Manage Patient Groups

Currently Viewing:

Group Identifier

LCG1000084

Current Members

2

Group Members:

+ Add Patients

Name	Address	Date of Birth	Sex	NHS Number	
AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove
TESTTEAM, Twoppm	Leeds General Infirm, Great George Street, Leeds,.	11-May-1934 00:00	Female	999 000 3564	Remove

# Viewing a LCG Patient Group History

1

In the **Single Patient View Banner**, Select **View Patient Group History**

The screenshot shows the 'Single Patient View Banner' for a patient named 'CHILD, Becky'. The banner includes fields for Address (LS9 7TF), Phone, GP, PAS No., and Allergies. A link 'View Patient Group History' is highlighted in a red box under the 'Patient Groups' section.

2

The **Patient Group History** is now Visible

The screenshot shows the 'Patient Group History' table for 'CHILD, Becky'. The table has columns for Group Identifier, Date Added, and Added By. Below the table is a section for 'Historic Groups' with columns for Group Identifier, Date Added, Date Removed, Added By, and Removed By.

Group Identifier	Date Added	Added By
LCG1000081	01-Nov-2023 11:38	Rosie Mawer

Historic Groups:

Group Identifier	Date Added	Date Removed	Added By	Removed By
LCG1000066	17-Aug-2023 09:28	01-Nov-2023 11:38	Rosie Mawer	Rosie Mawer
LCG1000020	12-Jul-2023 15:17	17-Aug-2023 09:28		Rosie Mawer
LCG1000017	12-Jul-2023 13:10	12-Jul-2023 15:17		
LCG1000012	12-Jul-2023 13:09	12-Jul-2023 13:09		



# Completing a Clinical Genetic Disease eForm

To **Add a Clinical Genetic Disease Form** for a Patient, you will need to **Add a Clinical Document**. This can be completed via the **Add Clinical Document in the Patient's Single Patient View**. Please see the **Clinical Document User Guide** to see further information on how to **Add a Clinical Document for a Patient**. Please **Click Here** to view the **User Guide**.

1

When in the **Add Document** screen, type **Clinical Genetic** in the filter section. You will then see in the **Add New Document** section the **Clinical Genetic Disease eForm**.

The screenshot shows the 'Add Document' window. At the top, there is a search bar containing 'Clinical genetics', which is highlighted with a red rectangle. Below the search bar are two dropdown menus: 'Show All' and 'Sort By Favourites'. Under the 'In Progress (Drafts)' section, it says 'There are no draft documents'. In the 'Add New Document' section, there are two items listed: 'Clinical Genetic Disease' with a star icon and 'Clinical Genetics Clinical Note' with a star icon. To the right of these items are links: 'Histocompatibility And Immunogenetics' and 'Clinical Note'. At the bottom left of the window is a 'Cancel' button.

2

Click on the **Star icon** to **favourite the eForm**. Click on the **eForm name to open it**.

This screenshot is similar to the one above, but the star icon next to 'Clinical Genetic Disease' is now highlighted with a red rectangle, indicating it has been clicked. The rest of the interface remains the same.



3

When the eForm opens, in the **Clinical Presentation** section use the search field to find the **Reason for Referral**. You can also search for **Common Referral Reasons** and select the relevant **Test Situation**.

+ Add

4

Use the **Add button** to add more **Reason's for Referral**.

5

In the **Clinical Genetics Diagnosis** section of the eForm, click into the **Disease** box and insert the **Phenotype MIM Number** or the name of the **Disease**. Once you have found the name of the Disease, click on it.

6

Next, insert the **Date the Disease was Diagnosed or Discovered**. Please use the format **dd/mm/yyyy**.

7

Select the **Status** of the **Diagnosis** by selecting either **Provisional**, **Confirmed**, **Refuted** or **At Risk Relative**.

Clinical Genetic Diagnosis

Disease

Search...

Phenotype MIM number

Date

dd/mm/yyyy

Status

Provisional Confirmed Refuted At risk relative

8

In the **Genotypes** section of the eForm, click into the **Genotype** box and insert the **Genotype/locus MIM number** or the name of the **Genotype**. Once you have found the name of **Genotype**, click on it.

Genotypes

Genotype

Search...

Status

☐ Pathogenic

☐ Likely Pathogenic

☐ VUS

+ Add

9

Next, select the status of the **Genotype** by selecting either **Pathogenic**, **Likely Pathogenic** or **VUS**.

Genotypes

Genotype

ACID PHOSPHATASE 4; ACP4

Genotype / locus MIM number

Status

☒ Pathogenic

☐ Likely Pathogenic

☐ VUS

+ Add

10

Use the **Add button** to add more **Genotypes**, if needed.



11

In the **Phenotype** section of the eForm, click into the **Phenotype** box and insert the **Phenotype Name or HPO**. Once you have found the name of the **Phenotype**, click on it.

The screenshot shows the 'Phenotype' section of the eForm. It features a search box labeled 'Phenotype' with a 'Search...' placeholder and a dropdown arrow. Below the search box are two radio buttons for 'Status': 'Present' and 'Absent'. At the bottom of the section is a blue button labeled '+ Add'.

12

Select the **Status** of the **Phenotype** by selecting either **Present** or **Absent**.

The screenshot shows the 'Phenotype' section of the eForm. The search box now contains the text '3-METHYLCROTONYL-CoA CARBOXYLASE 2 DEFICIENCY; MCC2D'. Below the search box, the 'Status' section is highlighted with a red box, showing two radio buttons: 'Present' and 'Absent'. At the bottom of the section is a blue button labeled '+ Add'.

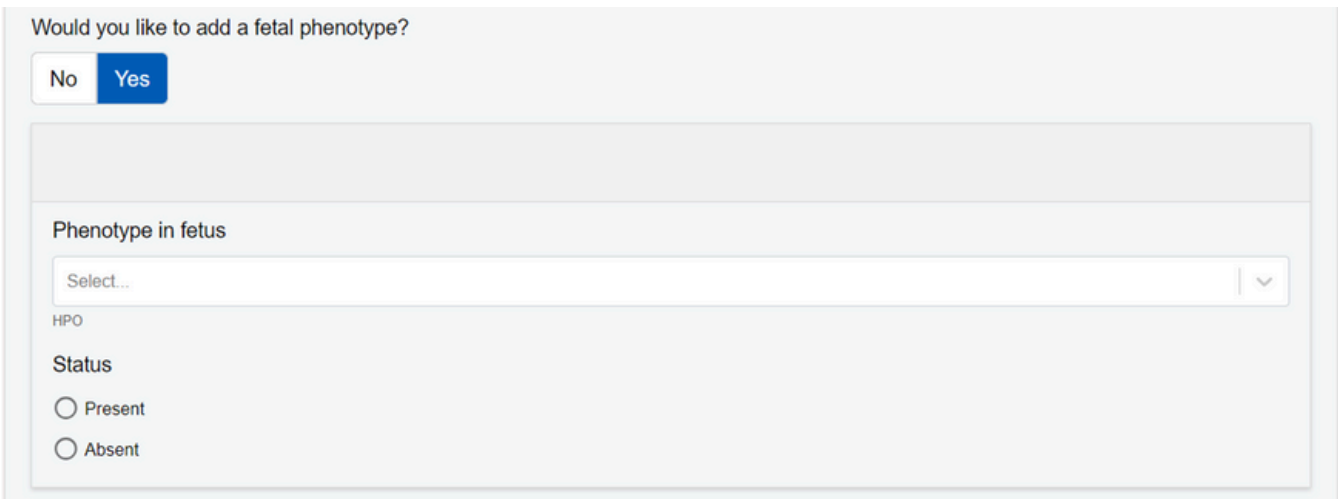
13

Use the **Add button** to add more **Phenotypes**, if needed.

+ Add

14

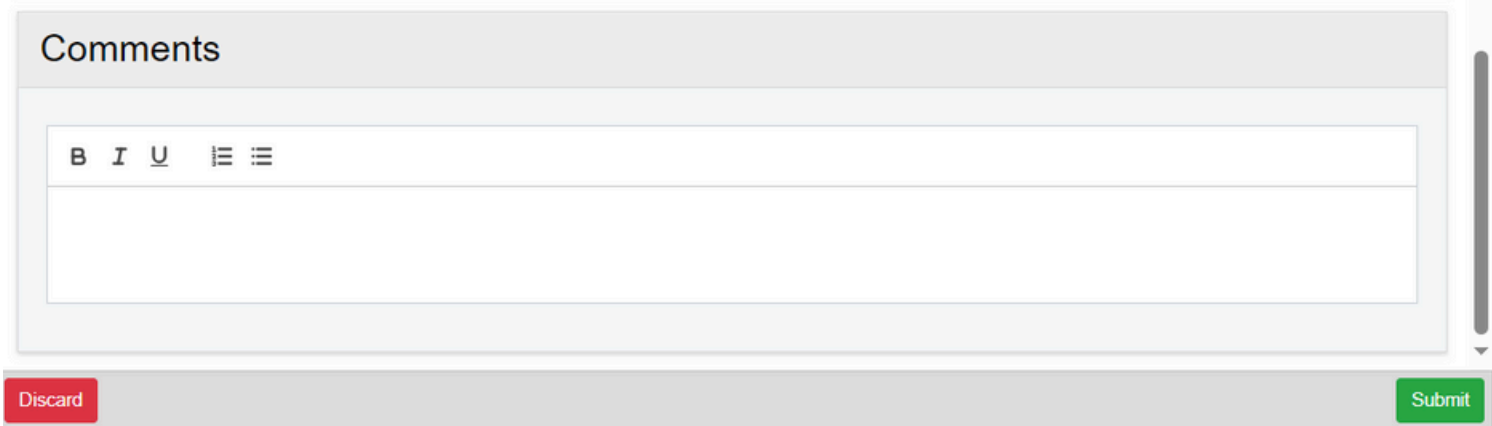
If you click **Yes**, you can add a **Phenotype in Fetus**, click into the **Phenotype** box and insert the **Phenotype Name** or **HPO**. Once you have found the name of the **Phenotype**, click on it.



Select the **Status** of the **Phenotype** by selecting either **Present** or **Absent**.

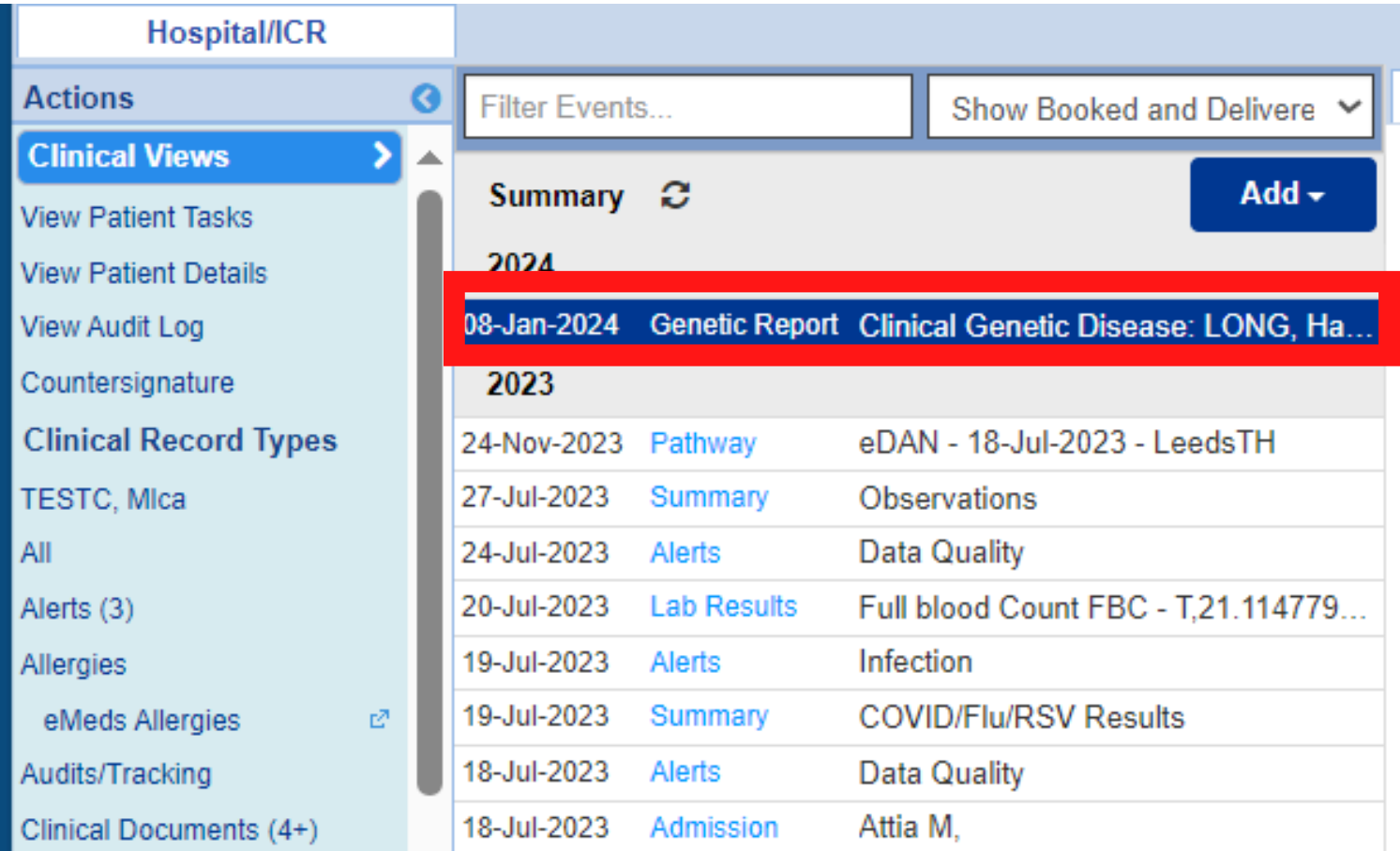
15

In the **Comments** section, you can add some **free text, if required**. Once finished, click on **Submit**.



16

The submitted **Clinical Genetic Disease eForm** will appear in the **Patient's Single Patient View**.



Hospital/ICR		
Actions		Filter Events...
Clinical Views		Show Booked and Delivered
View Patient Tasks		
View Patient Details		
View Audit Log		
Countersignature		
Clinical Record Types		
TESTC, Mica		
All		
Alerts (3)		
Allergies		
eMeds Allergies		
Audits/Tracking		
Clinical Documents (4+)		
Summary		
2024		
08-Jan-2024	Genetic Report	Clinical Genetic Disease: LONG, Ha...
2023		
24-Nov-2023	Pathway	eDAN - 18-Jul-2023 - LeedsTH
27-Jul-2023	Summary	Observations
24-Jul-2023	Alerts	Data Quality
20-Jul-2023	Lab Results	Full blood Count FBC - T,21.114779...
19-Jul-2023	Alerts	Infection
19-Jul-2023	Summary	COVID/Flu/RSV Results
18-Jul-2023	Alerts	Data Quality
18-Jul-2023	Admission	Attia M,



# Viewing, Editing and Withdrawing Clinical Genetic Disease Form

1

To view a completed **Clinical Genetic Disease eform** navigate to the Patient's **Single Patient View** and **Select the entry** you are looking for.

The screenshot shows the 'Hospital/ICR' interface. On the left, the 'Clinical Views' menu is expanded, showing options like 'View Patient Tasks', 'View Patient Details', 'View Audit Log', 'Countersignature', 'Clinical Record Types', 'TESTC, Mica', 'All', 'Alerts (3)', 'Allergies', 'eMeds Allergies', 'Audits/Tracking', and 'Clinical Documents (4+)'. On the right, the 'Summary' tab is selected, showing a list of events. The entry '08-Jan-2024 Genetic Report Clinical Genetic Disease: LONG, Ha...' is highlighted in red.

2

The **eForm** will open on the **right hand side**. Click on the **Expand button**, to view the **eForm** in a larger view.

The screenshot shows the eForm interface. At the top, there are buttons for 'Expand', 'Print', 'Edit', and 'Audit Timeline'. The 'Expand' button is highlighted in red. Below the buttons, there is a section for 'Clinical Presentation' and 'Clinical Genetic Diagnosis'. The 'Clinical Genetic Diagnosis' section shows the disease 'ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1', the date '23-Oct-2023', and the status 'Confirmed'.

3

Click on the **Print button**, if you need to **Print** out the eForm.

The screenshot shows the eForm interface. At the top, there are buttons for 'Expand', 'Print', 'Edit', and 'Audit Timeline'. The 'Print' button is highlighted in red. Below the buttons, there is a section for 'Clinical Presentation' and 'Clinical Genetic Diagnosis'. The 'Clinical Genetic Diagnosis' section shows the disease 'ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1', the date '23-Oct-2023', and the status 'Confirmed'.



4

Click on the **Edit Button**, if you need to make any changes to the submitted **eForm**. The **eForm** will open again. When you have finished making any changes, click on **Submit**.

The screenshot shows the top navigation bar with buttons for 'Expand', 'Print', 'Edit', and 'Audit Timeline'. The 'Edit' button is highlighted with a red box. Below the navigation bar, there is a blue header bar with the text 'Submitted forms will only be visible to members of the Clinical Genetics service'. The main content area is divided into two sections: 'Clinical Presentation' and 'Clinical Genetic Diagnosis'. The 'Clinical Presentation' section has a 'Reason for Referral' field with a minus sign. The 'Clinical Genetic Diagnosis' section contains fields for 'Disease' (ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1), 'Date' (23-Oct-2023), and 'Status' (Confirmed).

5

Click on the **Audit Timeline Button**, if you need to view the audit trail for the eForm. A timeline of the eForm will appear.

The screenshot shows the top navigation bar with buttons for 'Expand', 'Print', 'Edit', and 'Audit Timeline'. The 'Audit Timeline' button is highlighted with a red box. The rest of the interface is identical to the previous screenshot, showing the 'Submitted forms will only be visible to members of the Clinical Genetics service' header and the 'Clinical Presentation' and 'Clinical Genetic Diagnosis' sections.

6

Click on the **Withdraw button**, to remove the completed document from the **Patient's record**. You will need to document the reason for **Withdrawing the document**.

The screenshot shows the top navigation bar with buttons for 'Expand', 'Print', 'Edit', and 'Audit Timeline'. The 'Withdraw' button is highlighted with a red box. A 'Withdraw' dialog box is open in the foreground, asking 'Are you sure you want to permanently withdraw, but not delete, the following document from this patient's record?'. It also asks for a reason for withdrawal and has a text input field with the text 'test'. The dialog box has 'Cancel' and 'Withdraw' buttons at the bottom.

# Clinical Genetics Clinical Note

1

In the Single Patient View  
**Select Add Clinical Document.**

Home TESTTEAM, Three (Mrs) x

TESTTEAM, Three (Mrs)

Address Leeds General Infirm, Great Georg... Phone

Hospital/ICR

Actions Filter Events... Show Booked and Deliverer

Clinical Views

View Patient Details

View Audit Log

Clinical Record Types

TESTTEAM, Three (Mrs)

All

Alerts (4)

Summary

2023

07-Aug-2023 AHP Asses DRAFT - AH Clinical Note

06-Jul-2023 Patient Prefe... ReSPECT P Attachment

28-Mar-2023 Summary Clinical Note Dictation (EPRO)

28-Mar-2023 Pathway eDAN - 06-D Manage Custom List

Add

Clinical Document

2

In the search bar type **Genetics** then **Select the Star Icon** to favourite the eForm.  
**Click on the eForm Title** to open it.

Add Document

Genetics

Show All Sort By Favourites

In Progress (Drafts)

Add New Document

Clinical Genetics Clinical Note Clinical Note

Cancel

3

Fill out the **Clinical Genetics Clinical Note** with the relevant information.

You can also attach an image to the **Clinical Genetics Clinical Note**. Please **click [here](#)** for the guide for on how to attach an Image.

Once completed select **Submit**.

Clinical Genetics Clinical Note

TESTC, Mica

Born 21-Aug-2019 Sex Female NHS No. 959 361 7434

Clinical Genetics Clinical Note

Author

LONG, Hayden (Mr) Digital System Support Officer , Acute Internal Medicine

Date of activity \* 21/11/2023 Time of activity \* 08:21

21-Nov-2023

Profession \* Select... Specialty \* Clinical Genetics

Type of note \* General

Subject

Notes \*

B I U

Attach an Image

Would you like to attach an image?

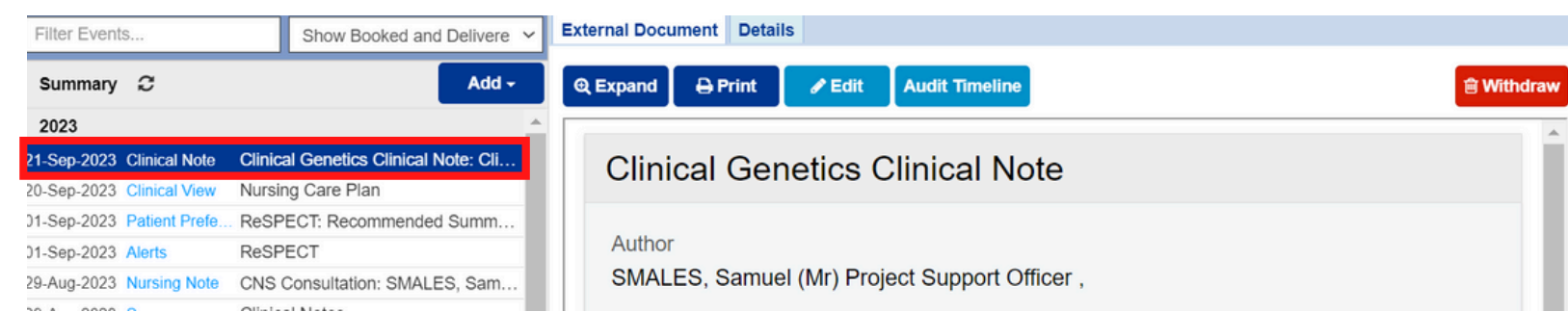
No Yes

Discard Submit



4

The completed **Clinical Genetics Clinical Note** will be visible in the **Patient's Single Patient View**.



Please note, the **Clinical Genetics Clinical Note is only visible to Clinical Genetics team members**. If you want to add any information to a Clinical Note which is visible to all PPM+ users, please complete a Clinical Note - **[Click Here](#)** on how to complete a Clinical Note.





# Viewing Clinical Genetics Information Recorded in PPM+

1

To view **Clinical Genetics Documents** in the Patient's **Single Patient View** type **Genetics** into Filter Events.

The screenshot shows the PPM+ interface for a patient named TESTML, Shiree (Ms). The 'Clinical Views' menu is open, and the 'Genetics' filter is applied to the 'Clinical Genetics Historic Information' document. The document is dated 03-Aug-2023 and is an Appointment.

2

Select the document you want to view.

The screenshot shows the 'Clinical Genetics Historic Information' document. The document is dated 11-Sep-2015 and is an Appointment. The document contains the following information:

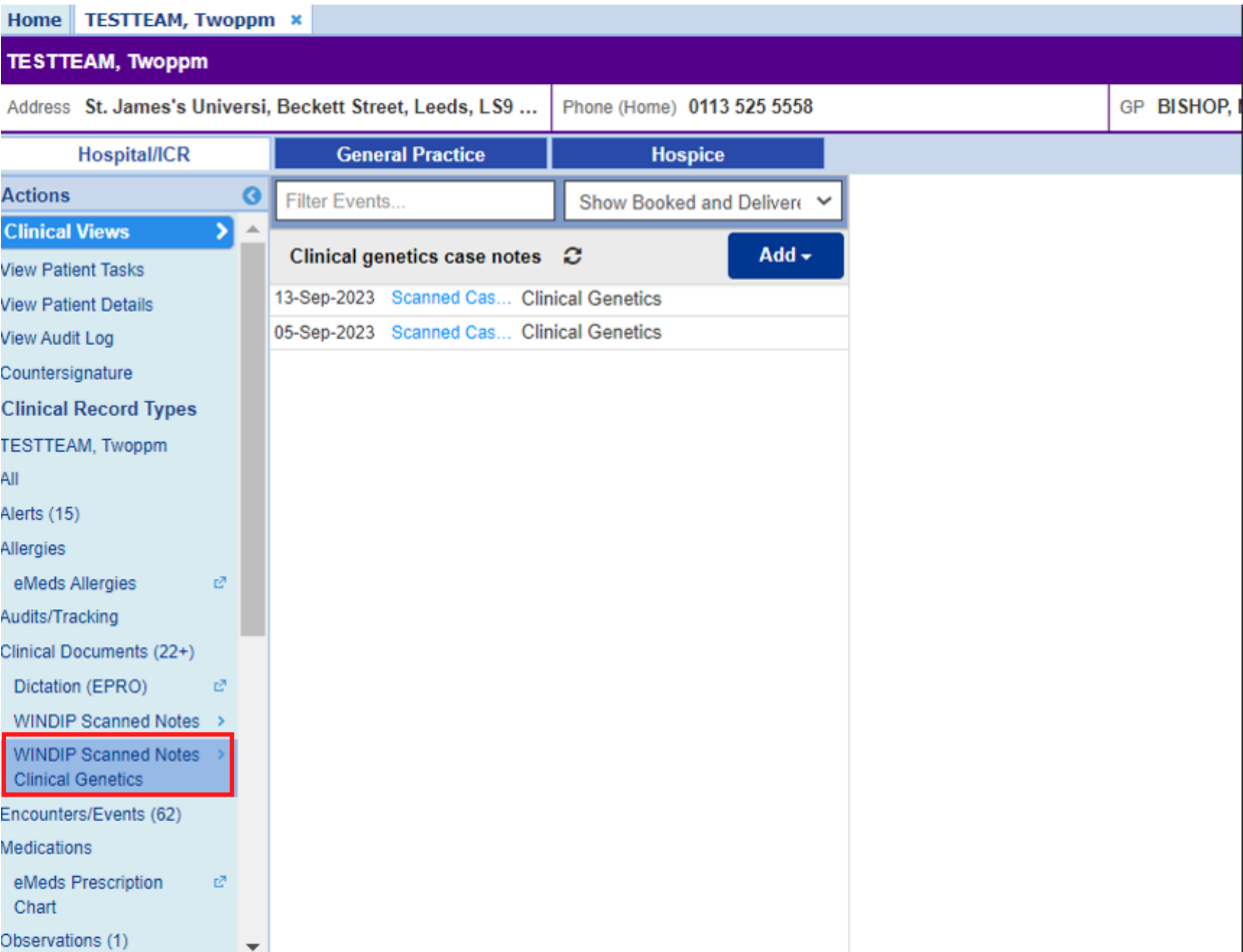
Clinical Genetics Historic Information		
NHS Number	Name	DOB
9691240513	BANANA SPLIT TEST	14/10/2005
PAS Number	Pedigree Number	
9019099	LCG0901909	
Additional Notes		
<p>&gt;Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer consequat tellus eget risus efficitur, vel bibendum lectus lobortis. Nullam pharetra sagittis tortor id consequat. Cras malesuada, nunc at lobortis malesuada, metus ligula hendrerit nulla, nec semper enim lorem in lacus. Sed bibendum eleifend justo, non bibendum turpis sodales et. Nullam ornare tellus in sem aliquet hendrerit. Sed efficitur eu sem eu tristique. Vestibulum id orci quis justo efficitur hendrerit sed nec orci. Donec magna lectus, sodales ut volutpat non, finibus quis tortor. Morbi at ex interdum, congue massa eu, mollis mi. Fusce sit amet sem est.</p>		
Date	Type	Indication
26/08/2014	Clinic, New	Breast Cancer
Reason for referral	Referred by	Seen by
New Test Reason	HorgnaK SagarP	SM1 KEB GT RFM
Counselled	Dept Cancelled	
Additional Notes		
<p>Suspendisse potenti. Aenean sit amet pellentesque diam. Sed non efficitur metus. Pellentesque eget odio et dolor suscipit congue. Integer tempor justo nec pulvinar sodales. Fusce ac egestas dolor. Proin varius vitae diam ac ornare. In non condimentum lac, a tincidunt enim. Ballantyne viverra semper eleifend. Quisque tristique finibus limbo quis egestas. Mauris a dolor erat.</p>		



# How To View WINDIP Scanned Documents in PPM+

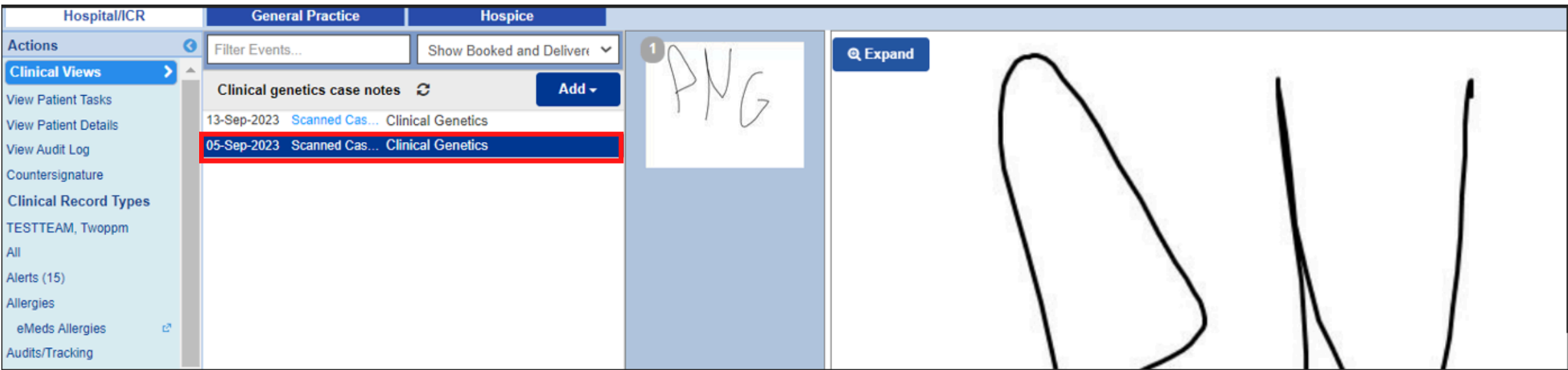
1

In the **Single Patient View**, Select **WINDIP Scanned Notes Clinical Genetics**.



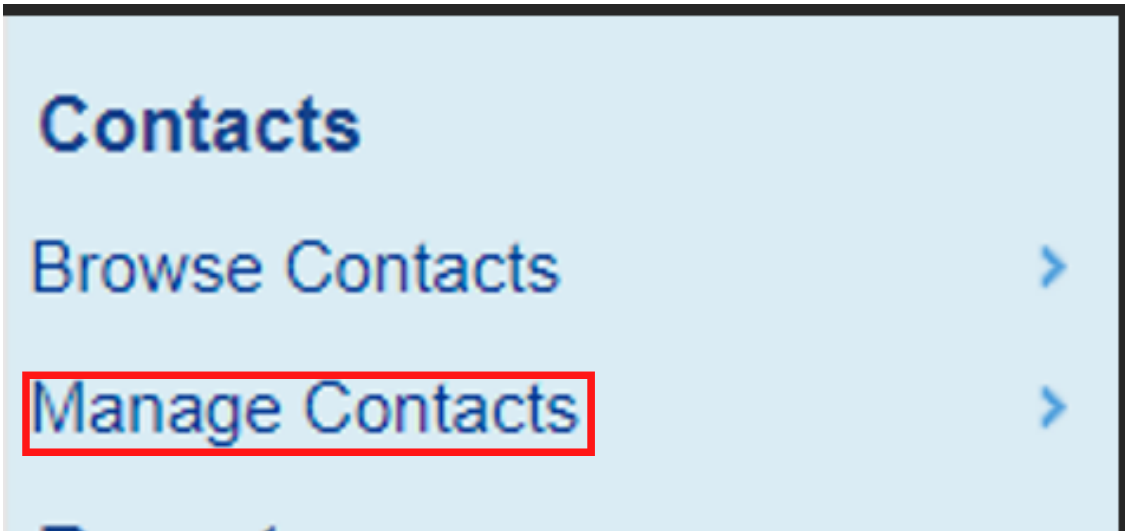
2

Select the Document you wish to view.



# To View the Membership of a Clinical Genetics Team

1 From the PPM+ Home Screen **Select Manage Contacts.**



2 Type in the **Name of the Team** in the **Name / National Code field** and **Click Search.**

Search Contact

Name / National Code

Clinical Genetics PPA - Cancer

Search

Action	Name	Job Title	Type	Specialty	Code	Address
	Clinical Genetics PPA - Cancer		Team	Clinical Genetics		Department of Clinical Genetics

3 Click on the **blue Action Arrow** and **Select View Team.**

Action	Name	Job Title	Type	Specialty	Code	Address
	Clinical Genetics PPA - Cancer		Team	Clinical Genetics		Department of Clinical Genetics

View Team

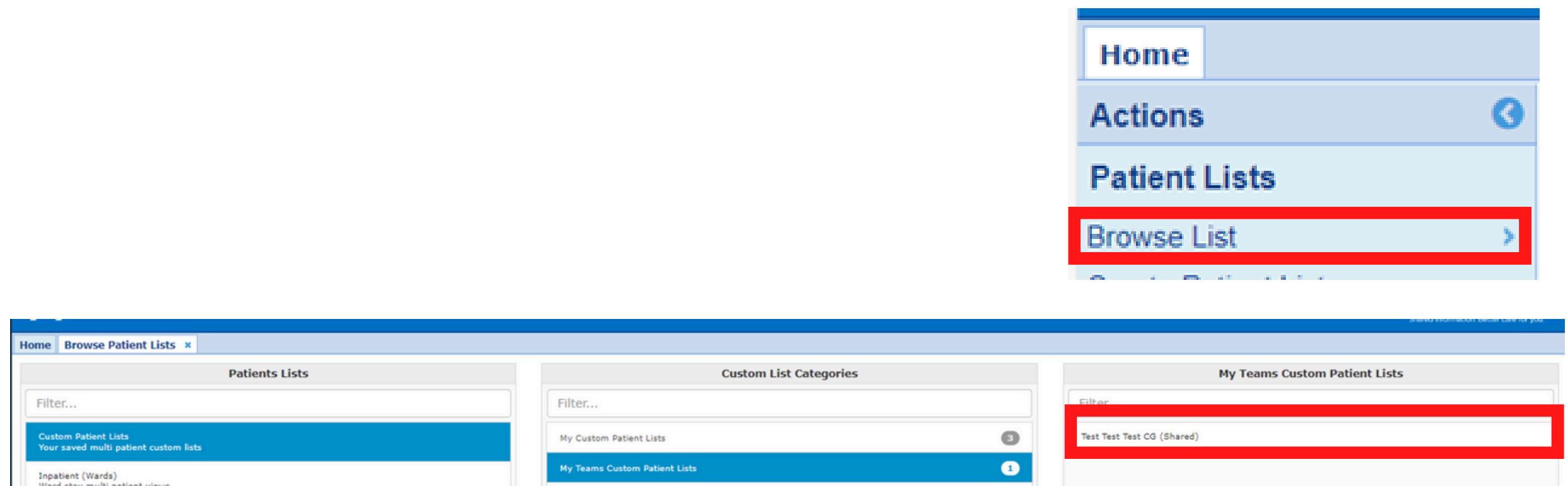
4 **Select Membership.** You will now see a list of the Team Membership.

Team Details	Team Membership			
Membership	Contact Name	From	Until	Core Member?
Profile	<a href="#">🔗</a> AUTO_TESTCAT4_5, SJ (Mr) : St James's University Hospital (Admin)	21-Jun-2019		Core
	<a href="#">🔗</a> BARNETT, Jack (Mr) : St James's University Hospital (Other)	21-Jun-2019		Core
	<a href="#">🔗</a> MANTRI, Aparna : Patient Administration, Level 4, St James's Institute of Oncology (Admin)	21-Jun-2019		Core
	<a href="#">🔗</a> MARSHALL, Luke (Mr) : St James's University Hospital (Admin)	18-Jun-2019	12-Jul-2023	Core
	<a href="#">🔗</a> MCKENZIE, Jacob (Master) : St James's University Hospital (Admin)	21-Jun-2019		Core
	<a href="#">🔗</a> PULMONARY FUNCTION TESTS DEPARTMENT, Sdf (Sister) : St James's University Hospital (Other)	03-Jan-2023	04-Jan-2023	Core
	<a href="#">🔗</a> SMALES, Samuel (Mr) : Backwell Wing, St James's University Hospital (Admin)	18-Jan-2023		Core

## How to find a Teams Custom list

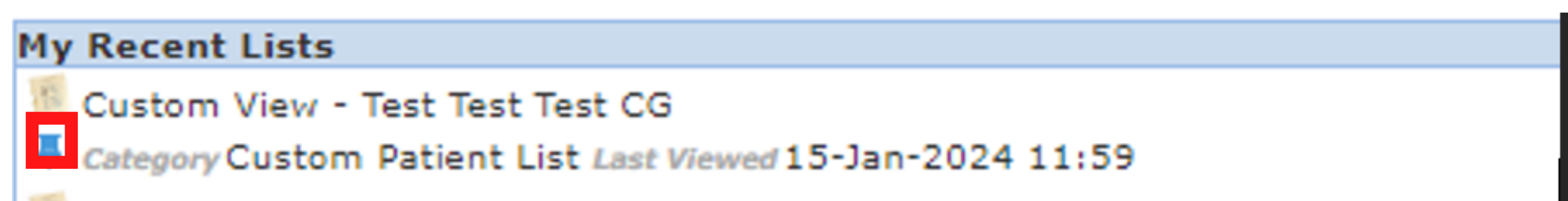
1

To find your teams list from the Home Screen **By Selecting Browse List, Custom Patient Lists, My Teams Custom Patient Lists** Then **Select the Required** List, if the list has been shared with you.



2

The list will be visible in the **My Recent Lists Section**, Click on the list to open it. You can Click on the Pin Icon to keep the Custom Patient List at the top your list.



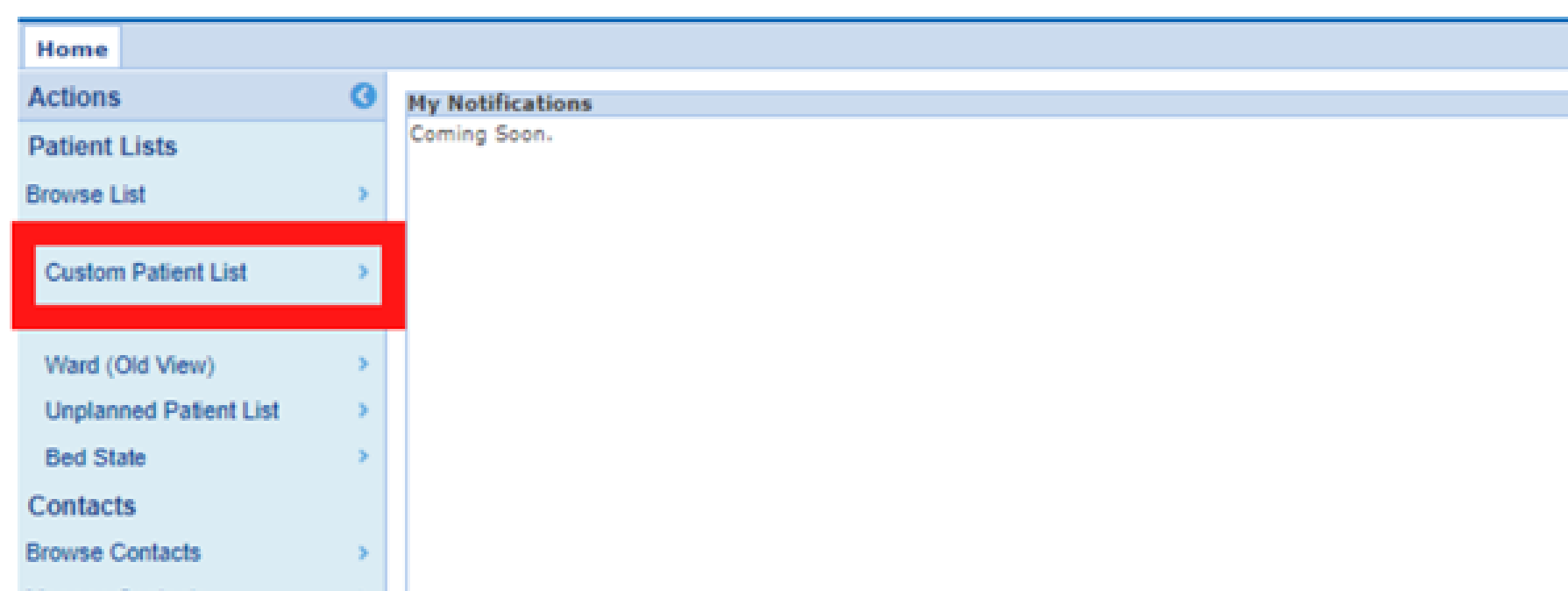


# To Create a Custom List for Your Assigned Clinical Genetics Tasks

You can create a list of **Clinical Genetics Tasks** Assigned to You. **Please note this list will not include tasks allocated to your Clinical Genetics Team but not Assigned to you.**

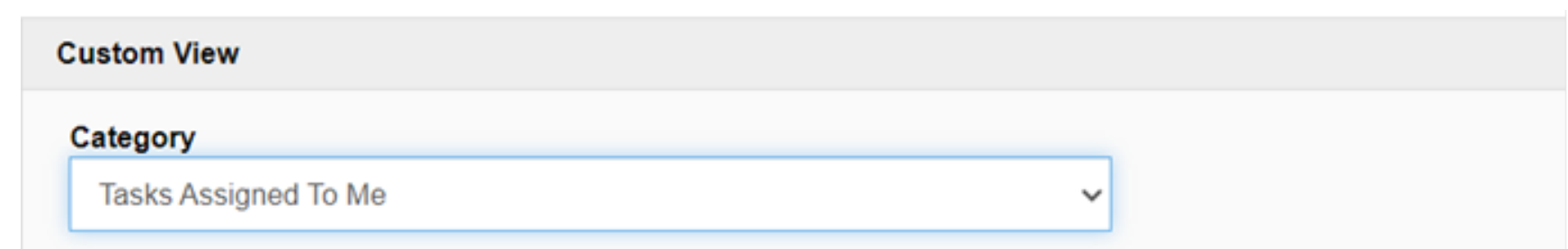
1

On the PPM+ Home Screen, **Click on Custom Patient List on the left hand side.**



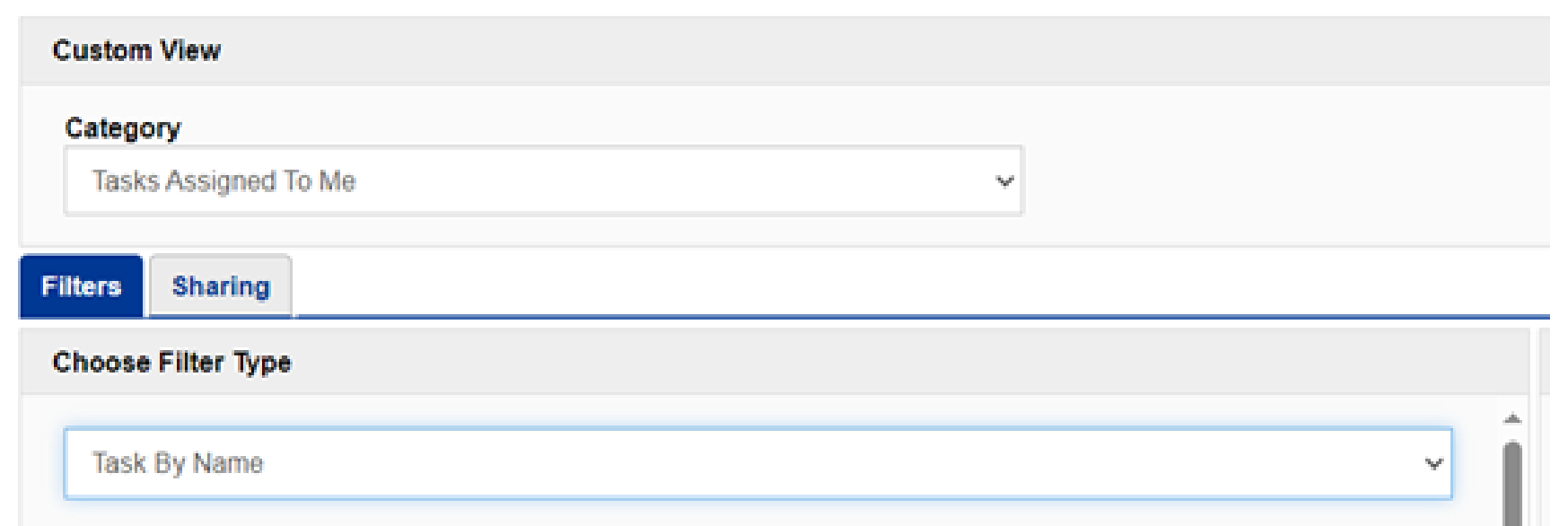
2

In the Custom View, **Click in the Category section** and then **Select Tasks Assigned to Me.**



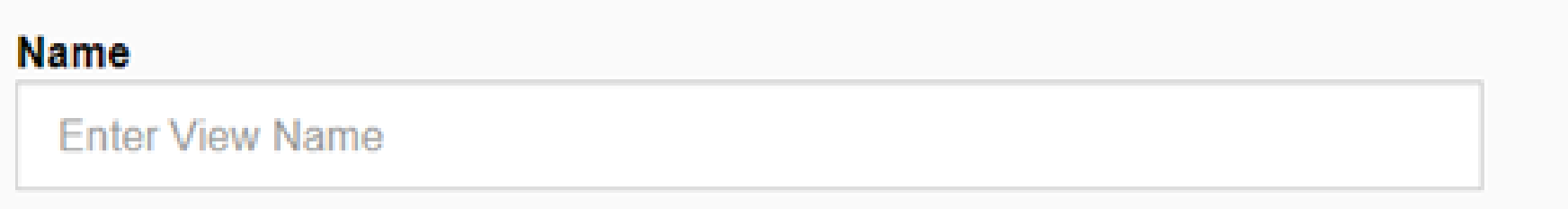
3

In the **Choose Filter Type** select **Task By Name.**



4

In the Name field give **Your list a unique name**



5

**Select All Relevant Tasks** in the drop down list. You will see the selected **Tasks on the right side of the screen.**

The screenshot shows the 'Filters' tab with two sub-tabs: 'Choose Filter Type' and 'Filter Criteria'. Under 'Choose Filter Type', there is a dropdown menu labeled 'Task By Name'. Below it, a list of tasks is shown with checkboxes: 'Cancer Registry' (checked), 'Consent Request' (unchecked), 'Further Info Request' (unchecked), 'MDT Review' (checked), 'Patient contact' (unchecked), and 'Patient Review' (unchecked). The 'Filter Criteria' tab on the right shows a list of selected tasks: 'Cancer Registry' and 'MDT Review'.

6

You can share your list if required by **Selecting the Sharing tab and searching for the person in the Search field.**

The screenshot shows the 'Sharing' tab. It has a 'Choose Filter Type' dropdown menu with the text 'Please Select...' and a search field below it.

7

Now **Click Save.** Your list will now show

A blue rectangular button with the word 'Save' in white text.

**Please Note - If you are creating a list of tasks assigned to you and want to share your list with a colleague e.g a Consultant sharing a list of their tasks to their PA, please make sure the list has been shared with the relevant colleague within the sharing tab.**

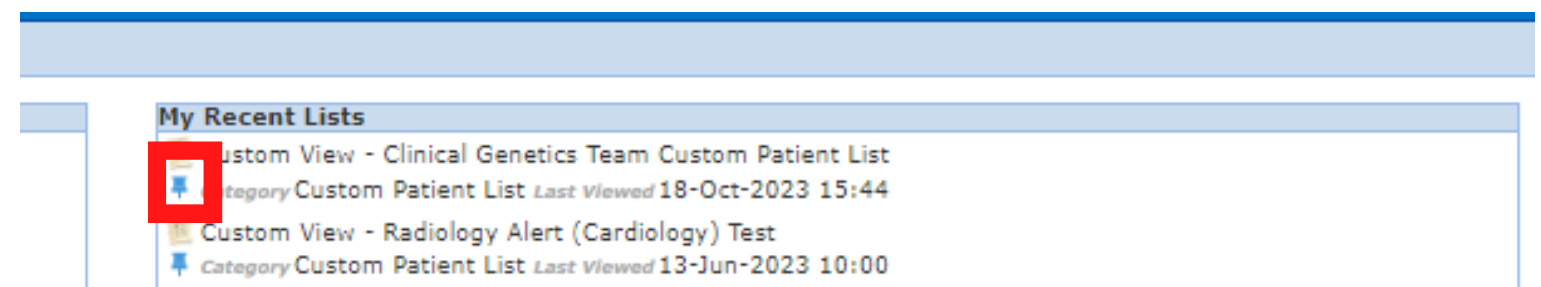


# How to find your tasks assigned to me

## Custom list

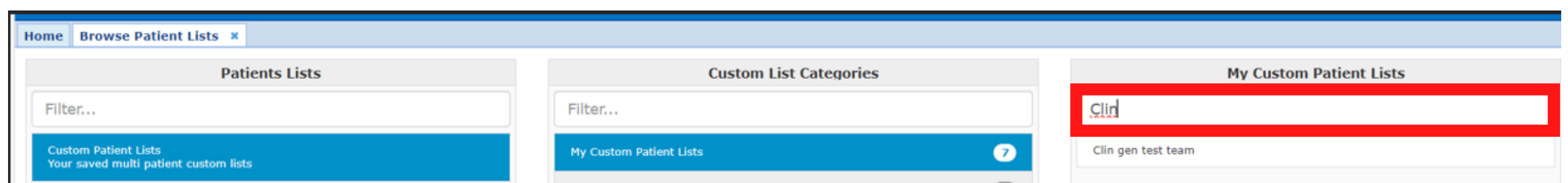
1

Once you have created your list, it will be visible in the **My Recent Lists Section**, Click on the list to open it. You can Click on the Pin Icon to keep the Custom Patient List at the top your list.



2

You can also find your list from the Home Screen **By Selecting Browse List, Custom Patient Lists, My Custom Patient Lists** Then **Select the Required List**.



To find out more about creating, viewing and editing Custom Patient Lists by [Clicking Here](#).

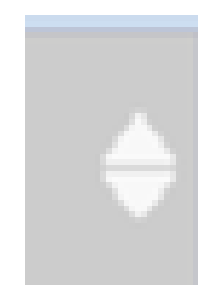


# Understanding and Navigating to Single Patient View from the Clinical Genetics Custom Patient List.

Clin Genetics Cancer Team Task List ⓘ											Select Columns
Action	Patient	NHS Number	Age	Tasks	Task Name	Due Date	Team	Assigned To	Requesting Clinician	Created Date	
	TESTTEAM Seven	ⓘ	/	11 (9 overdue, 2 due) ⓘ	Cancer Registry	13-Nov-2023 15:25	Clinical Genetics Cancer Team		HinchlIT	13-Nov-2023 15:23	
	TESTTEAM Seven	ⓘ	/	11 (9 overdue, 2 due) ⓘ	Further Info Request	13-Nov-2023 15:20	Clinical Genetics Cancer Team		HinchlIT	13-Nov-2023 15:20	
	TESTTEAM Seven	ⓘ	/	11 (9 overdue, 2 due) ⓘ							

- **Patient - Name of Patient**
- **Tasks - This column shows the number of Tasks for that patient, please note this includes all tasks not only Clinical Genetics ones.**
- **Task Name - Shows the name of the Adhoc Clinical Genetics Task requiring action for that Patient (It is possible for a Patient to be on the Custom Patient List multiple times if they have multiple Adhoc Clinical Genetics Tasks assigned to them.**
- **Due Date - When the Adhoc Task is due.**
- **Team - Team the Adhoc Task is assigned to.**
- **Assigned To - Who the Adhoc Task is assigned to**
- **Requesting Clinician - Who has assigned the Adhoc Task.**
- **Created Date - Shows the date the task was created.**

You can use the arrows at the top of a column to sort the list

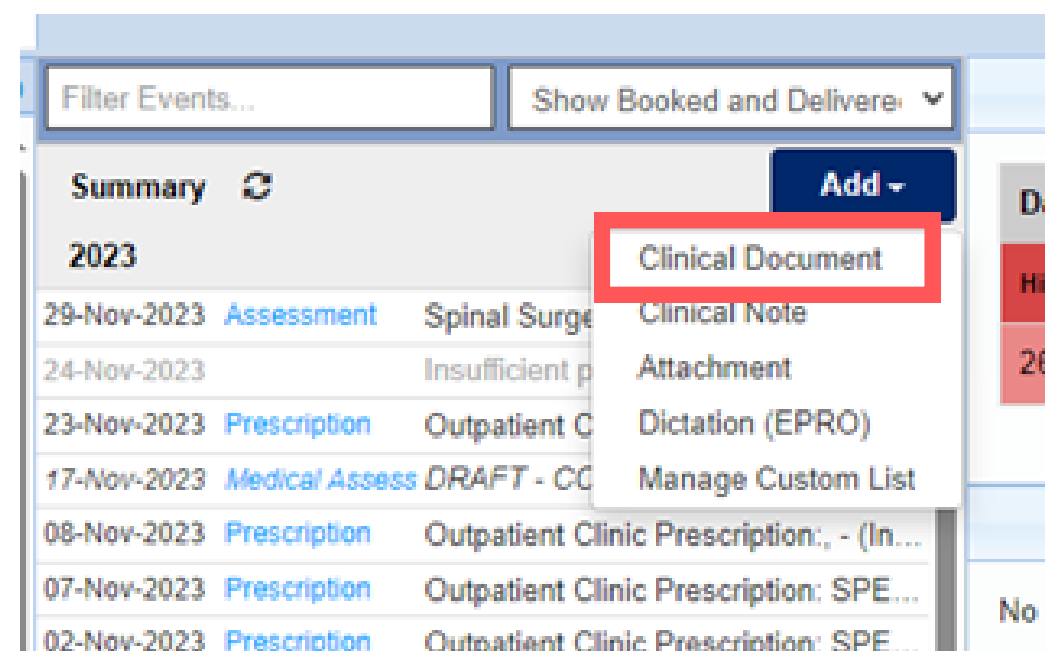




# Creating an Assign to Specific Team or User Adhoc Task

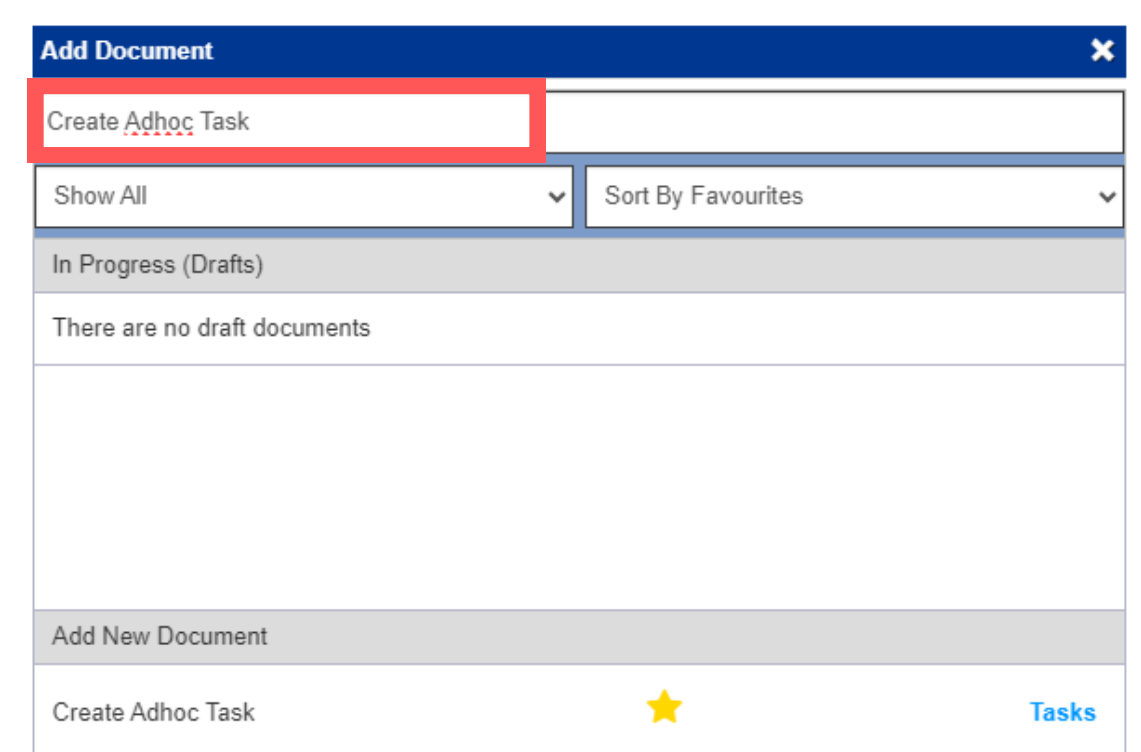
1

To add an **adhoc task**, navigate to the Patient's **Single Patient View** and clicking on the **Add** drop down and **Selecting Clinical Document**.



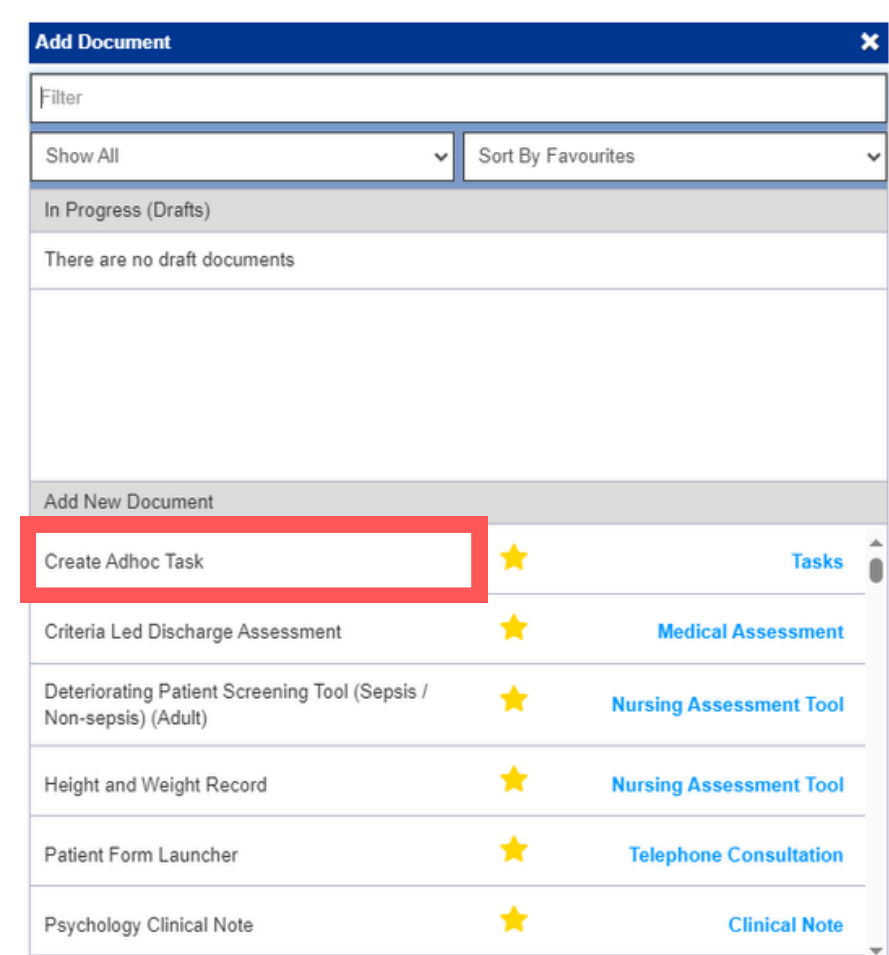
2

Next, type in **Create Adhoc Task** into the **Filter box**. Click on the **star icon** to favourite the **eForm** for easier navigation and searching going forward. Click on the eForm's name to open the **eForm**.



3

You can also add and complete the eForm via the **PPM+ Mobile app**. To find out how to add an eForm/Clinical Document via the **PPM+ Mobile app**, please follow the PPM+ Mobile guide by **[Clicking Here](#)**.



## Genetics Team

Please note:

Tasks that are not assigned to a Genetics Team will be visible to all non-Genetics users. Please ensure you select a Genetics team if the task contains sensitive information

4

This information is for **Clinical Genetics' Teams** awareness regarding the use of this **eForm** due to the sensitivity of the information they handle, that may be displayed to all staff within the Trust, if they select **Generic** as the **Adhoc Task Type**.

5

When creating an **Adhoc Task** for Clinical Genetics, please choose **Assign To Specific Team Or User**. Then select the **Team** from the drop down. For the purpose of this guide, we have selected **Clinical Genetics Appointments**.

6

Adding an **Assignee** is **optional**. This is to assign tasks to individuals required. Please be aware the assignee needs to be in the Team selected.

7

Then, chose the **Task Name** from the available tasks in the **Task Name** drop down.



8

Next, set the **Due Date and Time** for the task and when the task will be considered to be **Overdue**.

Click on an individual **field picker's icon** to amend that **Due Date** or **Time**, as required.

December 2024 ▼ ↑ ↓

Mo	Tu	We	Th	Fr	Sa	Su
25	26	27	28	29	30	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	31	1	2	3	4	5

9

You will then need to select the profession the Task is for via the Task profession drop down box.

10

It is possible add **additional professions**, who can complete the **Task** by clicking on the **drop down arrow**. If you need to remove an added **profession** click on the **x icon**.

11

When you have chosen to add tasks to a specific team, the **Task Context** box can be edited by using the drop down box.

12

Then fill in the **steps needed to complete the Task** in the **Steps to complete** free text box.

Use the **tools available to format** the task details, if required.

13

When you have finished completing the **eForm**, click on **Submit**.



# Viewing and Completing an Assign to Specific Team or user Adhoc Task via View Patient Tasks in the Single Patient View and Task column in the Multi Patient View

Adhoc Tasks functionality in PPM+ has been developed to support the provision of high quality patient care by providing a visual prompt to inform users when the associated eform requires completing.

1

When patients have an open **Adhoc Task**, this will show as a numerical value in the **Task column** on your ward **eWhiteboard** and also in the Task column on your desktop **multi-patient view**.

Ward View: TEST EPR ZZZ St James's University Hospital, Ward Code: ZZZ											Patient Name...		Ungroup	Select Columns	eWhiteboard View ▾					
Action	Ward	Bed	Patient	Age	Scanned Location	Time Since Arriva	Tasks	Consultant	Specialty	LOS	Criteria Led Discharge	R2R	R2R / Awaiting for Discharge	EDD	Planning	EDID	Clinical Summary	eDAN v2	Medical Jobs	Other Jobs
Bed Unassigned																				
	TEST EPR ZZZ		TESTCAF One	14y		448d 20h 11m	4 (4 overdue)	A	Medicine	449d					On Ward					
	TEST EPR ZZZ		TESTCAF Three	14y		445d 2h	4 (4 overdue)	A	Medicine	445d					On Ward					
	TEST EPR ZZZ		TESTCAF Two	14y		445d 2h 17m	4 (4 overdue)	A	Medicine	445d					On Ward					
	TEST EPR ZZZ		TESTCHECKWA Withouttofof-Edited	24y		245d 23h 2m (WA)	1 (1 overdue)	MSA	Surgery	WA					On Ward				Check recent results, Complete...	IV acc Ph: Re

When an **Adhoc Task** becomes **Due** you will see an **exclamation mark** in the Tasks column.

2

If the task becomes **Overdue** a **red question mark** will be seen in the **Tasks column**.

Alerts	Tasks	Consu
	1	MSA
	1 (1 overdue) ?	MSA
2 !	1 (1 due) !	MSA

Please note, if you cannot see the Task column on your multi-patient view, it can be added via 'Select Columns'.

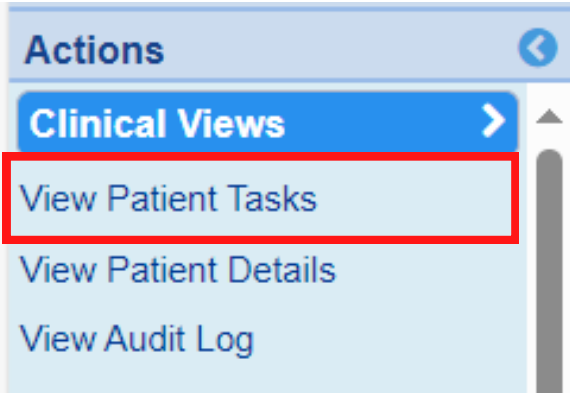
3

To access the **Task window** on the **Multi Patient View**, simply click on the **task cell** for your patient.

Ward View: TEST EPR ZZZ St James's University Hospital, Ward Code: ZZZ											Patient Name...		Ungroup	Select Columns	eWhiteboard View				
Action	Ward	Bed	Patient	Age	Scanned Location	Time Since Arrival	Tasks	Consultant	Specialty	LOS	Criteria Led Discharge	R2R / Awaiting for Discharge	EDD	Planning	EDID	Clinical Summary	eDAN v2	Medical Jobs	Other Jobs
Bed Unassigned																			
	TEST EPR ZZZ		TESTCAF One	14y		448d 20h 11m	4 (4 overdue)	A	Medicine	449d				On Ward					
	TEST EPR ZZZ		TESTCAF Three	14y		445d 2h	4 (4 overdue)	A	Medicine	445d				On Ward					
	TEST EPR ZZZ		TESTCAF Two	14y		445d 2h 17m	4 (4 overdue)	A	Medicine	445d				On Ward					
	TEST EPR ZZZ		TESTCHECKWA Withoutof-Edited	24y		245d 23h 2m (WA)	1 (1 overdue)	MSA	Surgery	WA				On Ward				Check recent results, Complete...	IV acc Ph Re

4

To access the **Task window via the Single Patient View** for your patient, click on **View Patient Tasks** in their **Single Patient View** within the **Actions** column.

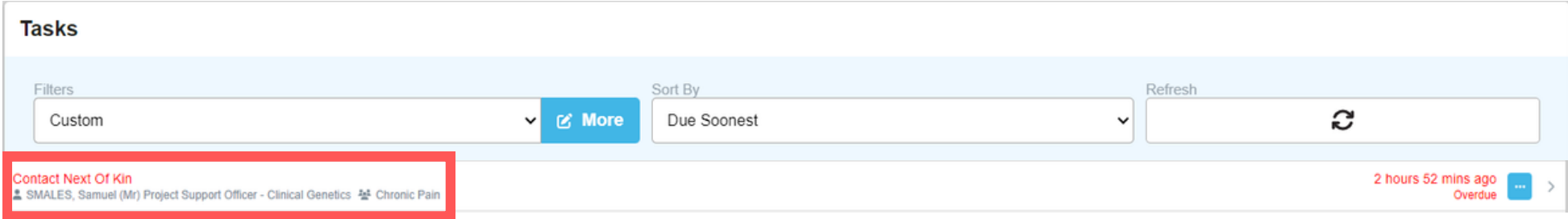


When you access the **Task window**, it will **functionally work the same** when accessed by the **Single Patient View** or **Multi Patient View**.

5

The **Tasks window** will automatically default to show **Due / Overdue tasks**.

Clicking on the **Adhoc Task name** will open the associated eForm, for you to complete the outstanding task



6

**Review the Task details** and **tick, I have completed the steps outlined above** box to complete the **task**.

Complete Adhoc Task

Please be aware, switching away from this form will cause any unsaved data to be lost.

Task details

Steps to complete test

Complete Task

Have all appropriate steps been followed? \*

☒ I have completed the steps outlined above

7

If the **steps** have **not been completed**, click on Discard. The **Adhoc Task** will remain open.



8

If the **steps** have **been completed** and the **box has been ticked**, click on **Submit**.



9

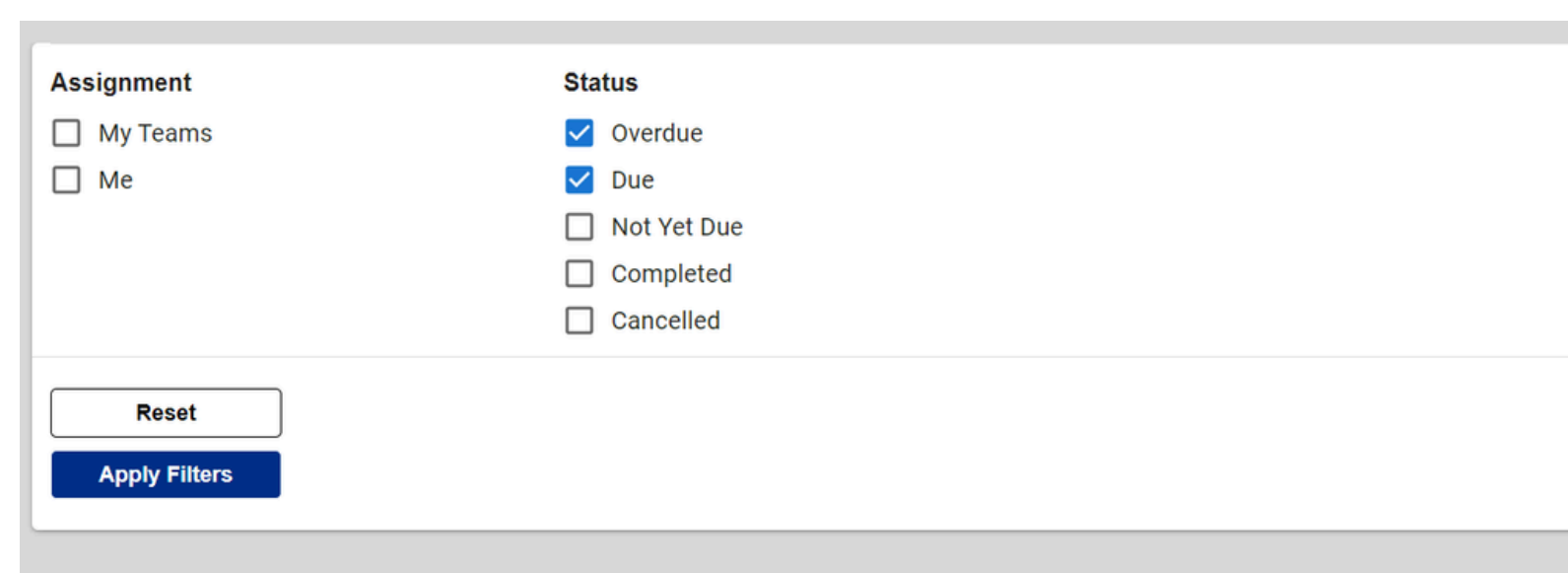
It is possible to filter the **tasks window display** you see in the **Patient's Task window** by clicking on **More**.



Within this section, you can **filter** the **Task window** to show the tasks by status you only wish to see. Select the **filters** you wish to apply by clicking the tick box next to the **filter** you wish to **add** or **remove**.

10

**Please be aware, Assignment filters (My Teams and Me) are only applicable for teams and users piloting the *Assign to specific team or user* side of the *Create Adhoc Task eForm* and will be fully functional when the Adhoc Task project is live Trust Wide, this will provide more visual benefit for every user in the Trust.**



Assignment	Status
<input type="checkbox"/> My Teams	<input checked="" type="checkbox"/> Overdue
<input type="checkbox"/> Me	<input checked="" type="checkbox"/> Due
	<input type="checkbox"/> Not Yet Due
	<input type="checkbox"/> Completed
	<input type="checkbox"/> Cancelled

Reset Apply Filters



11

If you **add** or **remove** any **filters** by mistake, click on the **Reset button** to go back to the **default filters**.

Reset

12

When you are happy with the **filters** you have selected, click on **Apply Filters**.

Apply Filters

Status meanings and how they display in the task window:

13

Tasks which are not due yet show in **black text**.  
Tasks which are due show in **amber text**.  
Tasks which are overdue show as **red text**.  
Tasks which are cancelled show as **greyed text**.

Please see the example below:

Height and Weight (Adult)	1 Day Ago Overdue >
Height and Weight (Adult)	<div>...</div> 1 Day Ago Due >
Height and Weight (Adult)	1 Day Ago Not Yet Due >
Redacted	1 Day Ago Due >

Select the **task** you want to complete.

Complete the associated **eForm** and **submit**, this will close the **Task**.

14

You can sort the **Task window** for your Patient by **Due Soonest**, **Least Due**, **A - Z** and **Z - A**. Click within the **Sort By** field to select how you wish to sort the **Task window**.

Sort By

Due Soonest

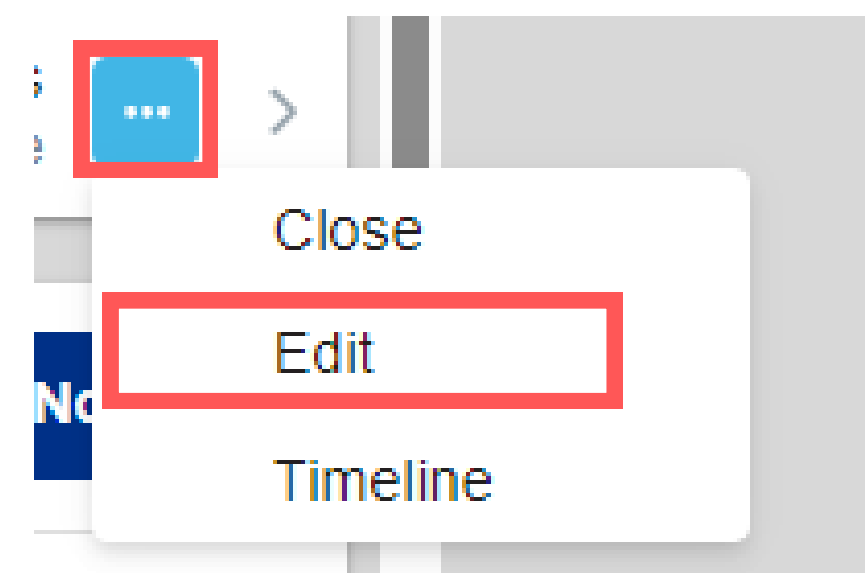
Due Soonest  
Least Due  
A - Z  
Z - A



# Editing an Assign to Specific Team or User Adhoc Task via View Patient Tasks Window

1

To **edit** an Assign to **Specific Team or User Adhoc Task**, click on the **blue square** for the Adhoc Task and then click on **Edit**. This can only be completed by the Task window



2

It is possible to reassign the **Adhoc task**. Click within the **Assignee** section to change who the Task is assigned to. **Please note: You can only reassign the task to someone in the Team the task is already assigned to.**

3

You can **edit** the **due and/or overdue date and/or time** by ticking the box **I want to change the due or overdue date / time** box. After doing this you can make the **edits**. The functionality for changing these **dates and times** is the same as shown previously in this guide.

Do you want to change the due or overdue date / time?

☒ I want to change the due or overdue date / time



4

You can also **edit** the **Task profession group** for the **task**. This works the same as **previously shown of in this guide**.

Task Profession \*

Doctor - Other Resident x

Admin & Clerical

Case Manager

Chaplaincy

Dietetics

Discharge Co-ordinator

5

You can also **edit** the **Task Context** for the **adhoc task**. This works the same as **previously shown of in this guide**.

Task Context \*

Discharge Planning x

Appointment

Assessment

Audit

Care Plan

Correspondence

Elective Surgery

6

You can also make any **edits** needed to the **Task details**, if required.

Task details

Steps to complete \*

B I U

- talk to family and gain consent from patient

7

You will need to complete a **Edit Task Reason** for editing the Task. This uses the **Clinical Note format**. You will need to view the **Tasks Timeline** to see this submitted **Edit Task Reason**.

Edit Task Reason

Please enter a reason for editing this task

Author: SMALES, Samuel (Mr) - (Admin - Clinical Genet)

Date of activity \*: 03/12/2024

Time of activity \*: 13:48

Profession \*: Case Manager

Specialty \*: Clinical Genetics

Type of note \*: Admin

Subject Line: The task 'Contact Next Of Kin' created on '03/Dec/2024 13:47' has been changed.

Notes \*: extended task to case manager



Then, click on **Submit**.



**Submit**

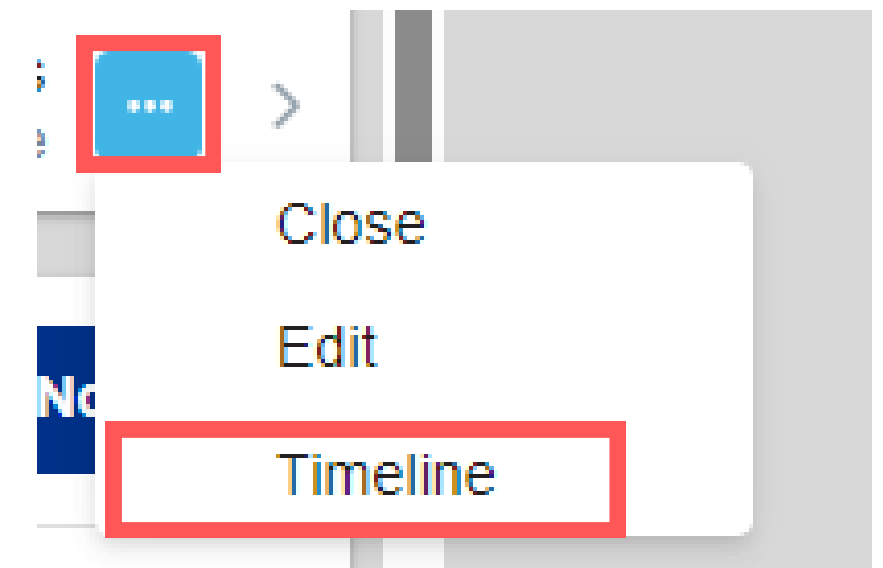
**Please be aware, following submission the '*Edit Task Reason*' will only be visible on the Task's *Timeline*.**



# Viewing the Timeline for an Assign to Specific Team or User Adhoc Task

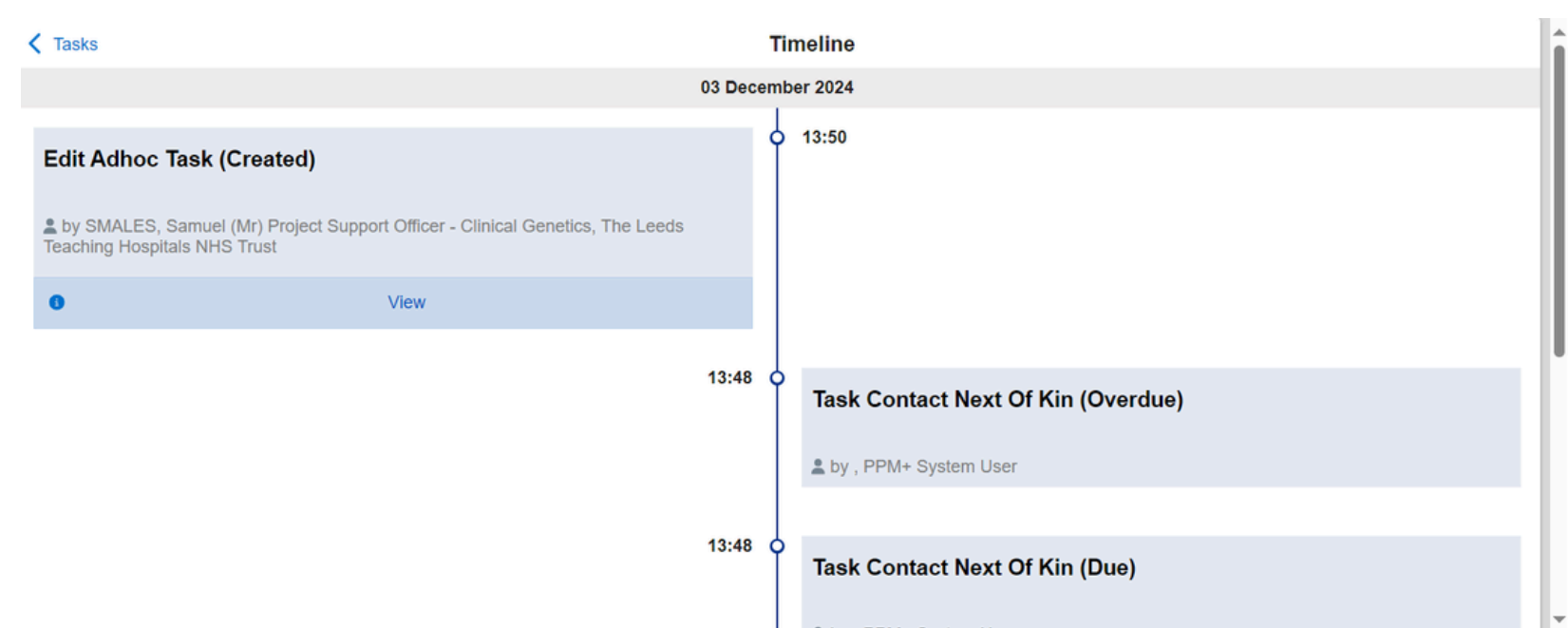
1

To view the **Timeline** for a **Adhoc Tasks Task**, click on the **blue square** for the **Task** and then click on **Timeline**.



2

The **Timeline** for the task will appear. Some **elements** within the **Timeline can be viewed** in greater detail by simply clicking on **View**.



3

To go back to the **Tasks window** display, click on **Tasks**.





# Viewing and Completing Adhoc Task via the Clinical Genetics Custom Patient List

It is possible to complete an **Adhoc Task** via the **Clinical Genetics Custom Patient List** itself. The functionality of the **Tasks window** is the same as shown previously in this guide.

When patients have **open Tasks**, this will show as a **numerical value** in the **Task column** on your ward’s eWhiteboard and also in the Task column on your **Clinical Genetics Custom Patient List**.

Clinical Genetics Team Custom Patient List <span>Select Columns</span>									
Action	Patient	NHS Number	Age	Tasks	Task Name	Due Date	Team	Assigned To	Requesting Clinician
	TEST Alpha		43y	1 (1 overdue)	Post-Clinic Information	18-Sept-2023 13:30	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	MDT Review	22-Sept-2023 13:37	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Positive Control Request	22-Sept-2023 13:39	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Positive Control Request	22-Sept-2023 13:46	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Post-Clinic Information	22-Sept-2023 13:53	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	Positive Control Request	22-Sept-2023 14:41	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	MDT Review	22-Sept-2023 14:44	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	Pre-Clinic Information	22-Sept-2023 14:48	Clinical Genetics Team		
	TESTML Testinga		11y	11 (11 overdue)	Pre-Clinic Information	22-Sept-2023 14:52	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Post-Clinic Information	22-Sept-2023 14:53	Clinical Genetics Team		
	TESTMLC Mic		31y	10 (10 overdue)	Positive Control Request	26-Sept-2023	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	MDT Review	26-Sept-2023 10:13	Clinical Genetics Team		

1

When a task becomes **Due** you will see an exclamation mark in the Tasks column. If the task becomes **Overdue** a **red question mark** will be seen in the **Tasks column**.

Please note, if you cannot see the **Task column** on your multi-patient view, it can be added via ‘**Select Columns**’.

Alerts	Tasks	Consu
	1	MSA
	1 (1 overdue)	MSA
2	1 (1 due)	MSA

Select Columns

2

Click on the **Task** box for your selected patient. This will then open the **Task window**.

Clinical Genetics Team Custom Patient List <span>Select Columns</span>									
Action	Patient	NHS Number	Age	Tasks	Task Name	Due Date	Team	Assigned To	Requesting Clinician
	TEST Alpha		43y	1 (1 overdue)	Post-Clinic Information	18-Sept-2023 13:30	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	MDT Review	22-Sept-2023 13:37	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Positive Control Request	22-Sept-2023 13:39	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Positive Control Request	22-Sept-2023 13:46	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Post-Clinic Information	22-Sept-2023 13:53	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	Positive Control Request	22-Sept-2023 14:41	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	MDT Review	22-Sept-2023 14:44	Clinical Genetics Team		
	TASK One		40y	10 (10 overdue)	Pre-Clinic Information	22-Sept-2023 14:48	Clinical Genetics Team		
	TESTML Testinga		11y	11 (11 overdue)	Pre-Clinic Information	22-Sept-2023 14:52	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	Post-Clinic Information	22-Sept-2023 14:53	Clinical Genetics Team		
	TESTMLC Mic		31y	10 (10 overdue)	Positive Control Request	26-Sept-2023	Clinical Genetics Team		
	TEST Mpv		3y	13 (13 overdue)	MDT Review	26-Sept-2023 10:13	Clinical Genetics Team		

## Additional SOPs, User Guides and Videos

For more information on PPM+ Clinic Functionality, Please [Click Here](#).

Additional WinDip SOPs and PAS User Guides and Tutorial Videos for Clinical Genetics functionality, please [Click Here](#).

**Please Note: When scanning into WinDIP, if using a PAS number which begins with a single or multiple 0's, remove these and only populate the remaining numbers' needs removing as it is confusing as we are only covering viewing windip documents.**



# Useful Contacts

## Implementation Team

Please contact the **Implementation Team** for Digital support & training on PPM+ functionalities.



[leedsth-tr.ImplementationTeam@nhs.net](mailto:leedsth-tr.ImplementationTeam@nhs.net)

## IT Service Desk

Please contact the **IT Service Desk** 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.



x26655



<https://lth-dwp.onbmc.com>



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

