

ppm+

Clinical Genetics

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES

Contents page

[How To Create and Edit a Contact - Page 3](#)

[Creating a Leeds Clinical Genetics\(LCG\) Patient Group- Page 4](#)

[Adding an Additional Patient to a Leeds Clinical Genetics \(LCG\) Patient Group - Page 5](#)

[Removing a Patient from a Leeds Clinical Genetics \(LCG\) Patient Group- Page 9](#)

[Viewing a Patient's LCG Patient Group- Page 10](#)

[Viewing a LCG Patient Group History- Page 11](#)

[Completing a Clinical Genetic Disease eForm - Page 12](#)

[Viewing, Editing and Withdrawing Clinical Genetic Disease Form - Page 17](#)

[Clinical Genetics Clinical Note- Page 19](#)

[Viewing Clinical Genetics Information Recorded in PPM+ - Page 21](#)

[How To View WINDIP Scanned Documents in PPM+ - Page 22](#)

[To view a membership of a clinical genetics team- Page 23](#)

[How to find a Team Custom list- Page 24](#)

[To Create a Custom List for Your Assigned Clinical Genetics Tasks- Page 25](#)

[How to find your tasks assigned to me Custom list- Page 27](#)

[Understanding and Navigating to Single Patient View from the Clinical Genetics Custom Patient List. - Page 28](#)

[Creating an Assign to Specific Team or User Adhoc Task - Page 29](#)

[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 - Page 33](#)

[Editing an Assign to Specific Team or User Adhoc Task via View Patient Tasks Window - Page 37](#)

[Viewing the Timeline for an Assign to Specific Team or User Adhoc Task - Page 40](#)

[Viewing and Completing Adhoc Task via the Clinical Genetics Custom Patient List - Page 41](#)

[Additional SOPs, User Guides and Videos - Page 42](#)

[Useful Contacts - Page 43](#)

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**.

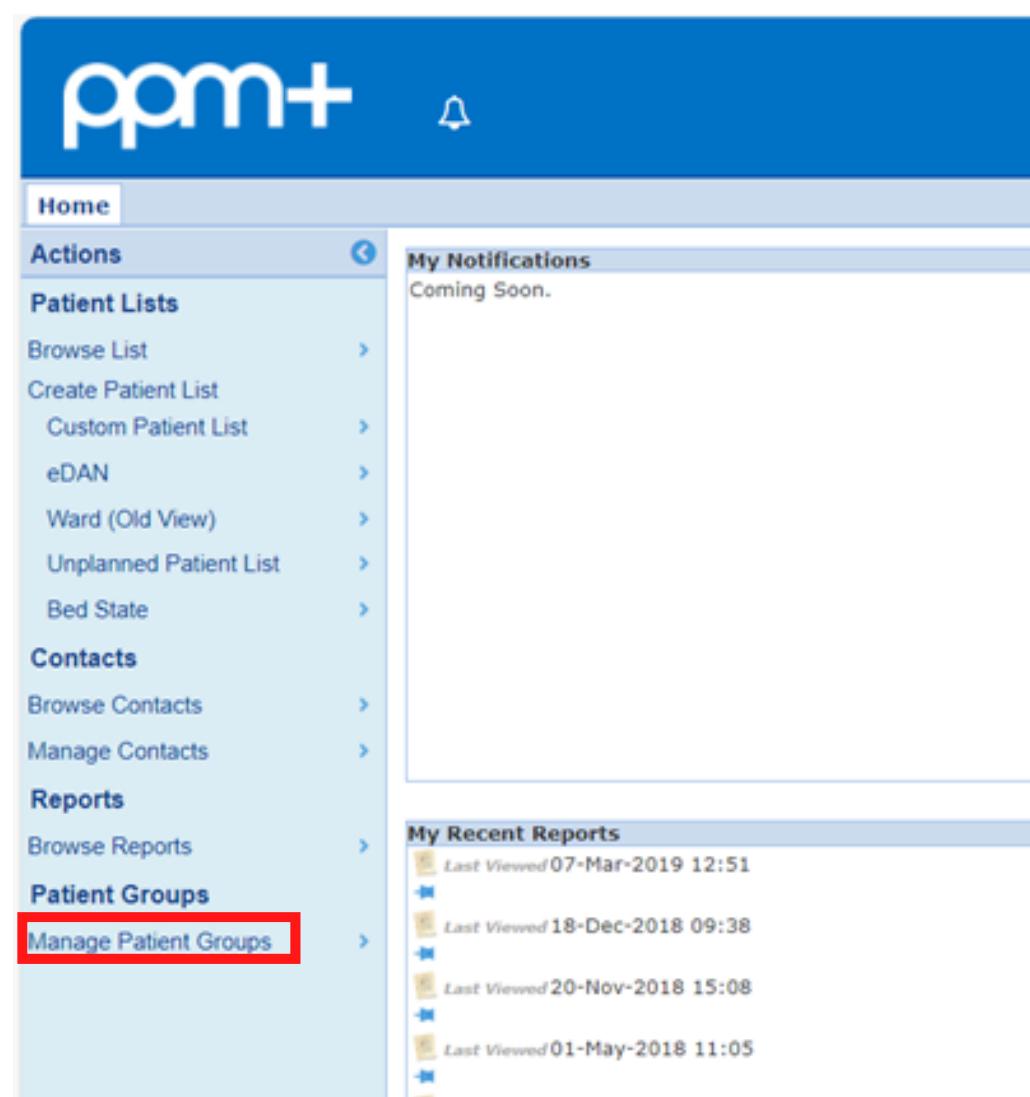
5

The Patient Has now been Assigned a Group.

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

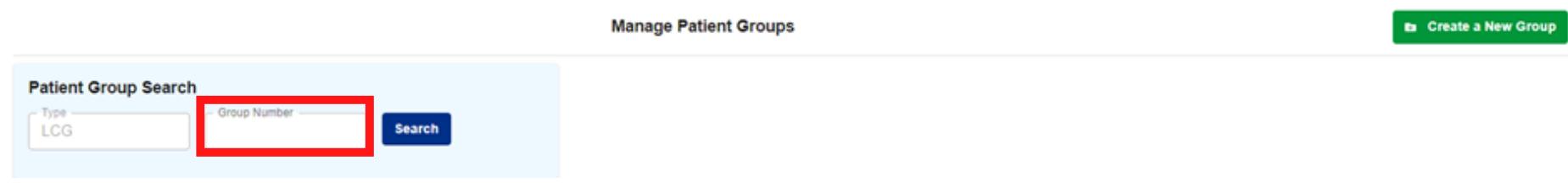
1

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



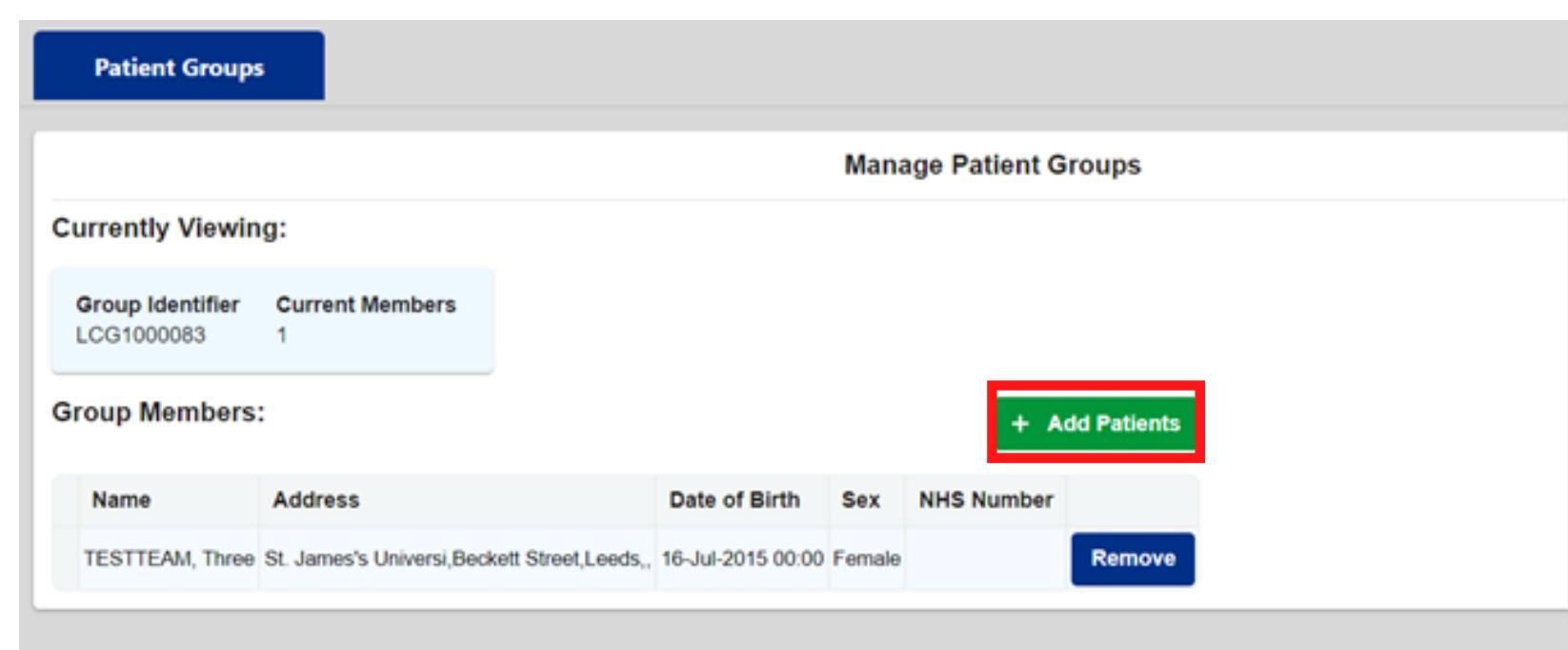
2

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



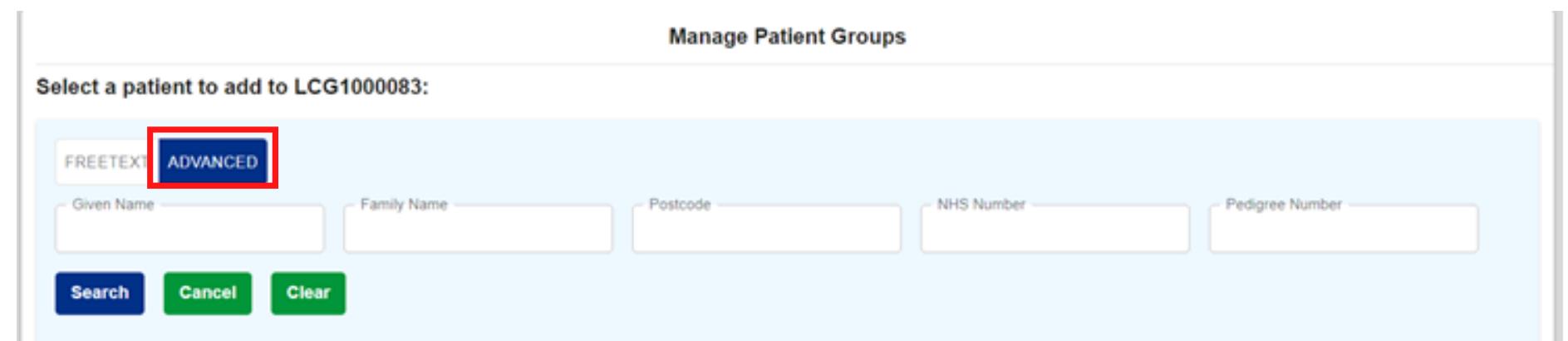
3

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



4

Click on the **Advance Tab**.



6

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.

Manage Patient Groups

Select a patient to add to LCG1000022:

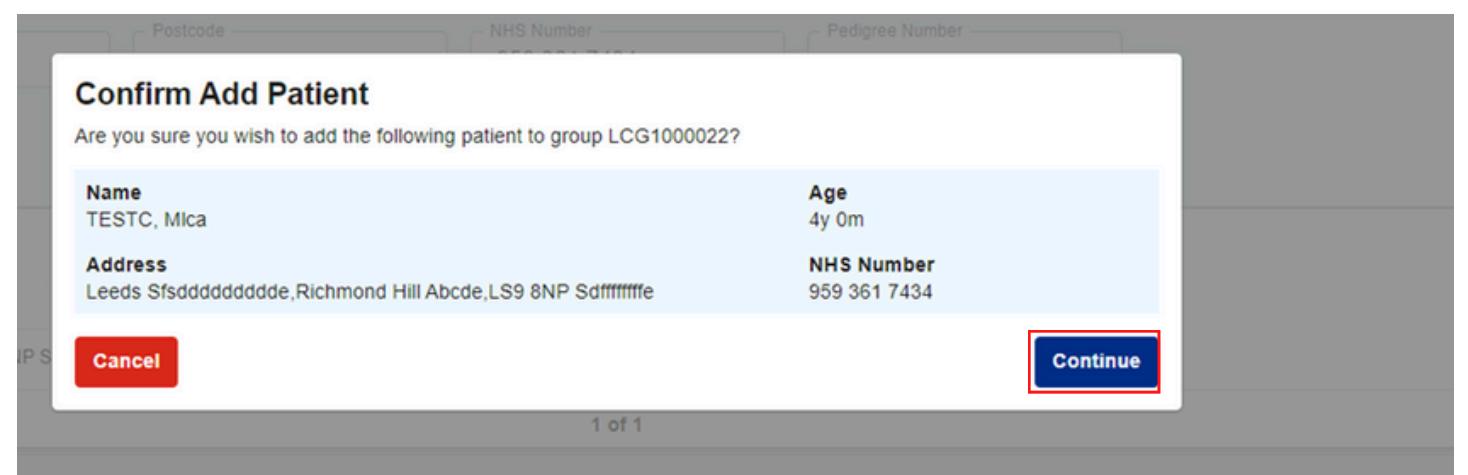
FREETEXT	ADVANCED				
Given Name	Family Name	Postcode	NHS Number	959 361 7434	Pedigree Number
<input type="button" value="Search"/> <input type="button" value="Cancel"/> <input type="button" value="Clear"/>					

Results:

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

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 LCGxxxxxxxxx. **If correct, select Continue.**



7

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

Patient Groups

Currently Viewing:

Group Identifier	Current Members
LCG1000084	2

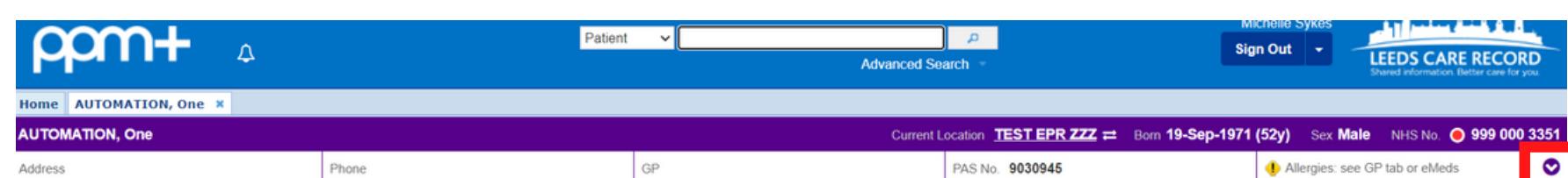
Group Members:

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

+ Add Patients

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.



9

Click on the patient's LCG Number.

Patient Record Details:

Phone	GP	PAS No. 9030945	Allergies: see GP tab or eMeds
Other Phone Numbers	GP Details	Other Identifiers PAS 9030945 SMS 900031125	
	View full GP Details	Patient Groups LCG 1000084	

10

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

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	

[+ Add Patients](#)

[Remove](#)

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 _____ Pedigree Number _____

959 361 7434

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**

Confirm Add Patient

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

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

Cancel Continue

1 of 1

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

14

Patient Groups x

Patient Groups

Manage Patient Groups

Currently Viewing:

Group Identifier	Current Members
LCG1000084	2

Group Members:

Name	Address	Date of Birth	Sex	NHS Number	Action
AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove
TESTTEAM, Twoppm	Leeds General Infir	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

Address: Leeds Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdfffffff, Skipton Dsfffffff

Usual Address: Leeds Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdfffffff, Skipton Dsfffffff

Phone: Other Phone Numbers

GP: GP Details [View full GP Details](#)

PAS No: 9037263

Other Identifiers: Casenote: AD3456, PAS: 9037263, SMS: 900037442

Patient Groups: LCG 1000083

View Patient Group History

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:

Name	Address	Date of Birth	Sex	NHS Number	Action
TESTC, Mica	Leeds Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdfffffff, Skipton Dsfffffff	21-Aug-2019 00:00	Female	959 361 7434	Remove
TESTTEAM, Three	St. James's University, Beckett Street, Leeds, LS1 4WJ	16-Jul-2015 00:00	Female		Remove

+ Add Patients

3

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

Confirm Remove Patient

Are you sure you wish to remove the following patient from group LCG1000083?

Name: TESTC, Mica	Age: 4y 0m
Address: Leeds Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdfffffff, Skipton Dsfffffff	NHS Number: 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.**

Address	Phone	GP	PAS No. 9030945	Allergies: see GP tab or eMeds
Usual Address	Other Phone Numbers	GP Details View full GP Details	Other Identifiers PAS 9030945 SMS 900031125 Patient Groups LCG 1000084	

3

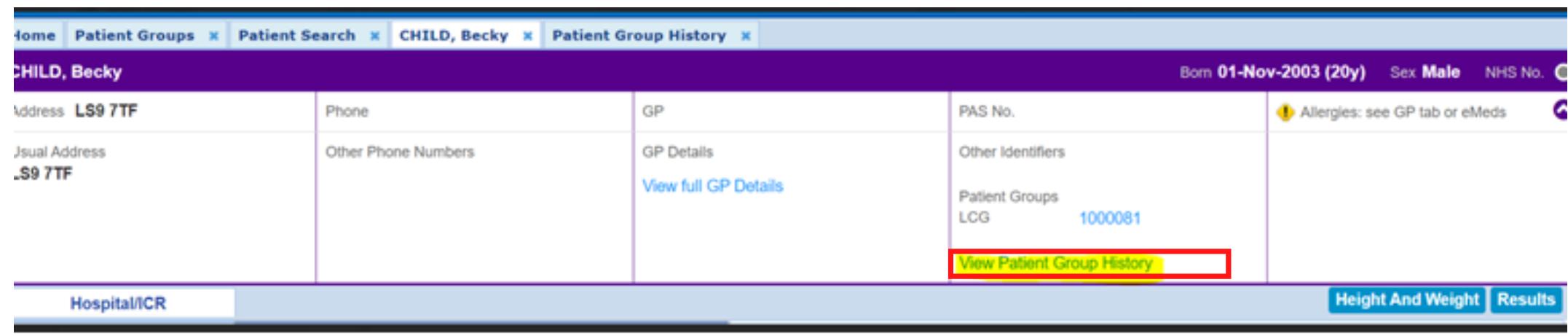
The **Patients LCG Patient Group** details will now show.

Patient Groups		Manage Patient Groups																			
Patient Groups																					
Currently Viewing:																					
<table border="1"> <tr> <td>Group Identifier</td> <td>Current Members</td> </tr> <tr> <td>LCG1000084</td> <td>2</td> </tr> </table>				Group Identifier	Current Members	LCG1000084	2														
Group Identifier	Current Members																				
LCG1000084	2																				
Group Members:																					
<table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Date of Birth</th> <th>Sex</th> <th>NHS Number</th> <th></th> </tr> </thead> <tbody> <tr> <td>AUTOMATION, One</td> <td></td> <td>19-Sept-1971 00:00</td> <td>Male</td> <td>999 000 3351</td> <td>Remove</td> </tr> <tr> <td>TESTTEAM, Twoppm</td> <td>Leeds General Infirmary, Great George Street, Leeds, LS1 3ED</td> <td>11-May-1934 00:00</td> <td>Female</td> <td>999 000 3564</td> <td>Remove</td> </tr> </tbody> </table>				Name	Address	Date of Birth	Sex	NHS Number		AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove	TESTTEAM, Twoppm	Leeds General Infirmary, Great George Street, Leeds, LS1 3ED	11-May-1934 00:00	Female	999 000 3564	Remove
Name	Address	Date of Birth	Sex	NHS Number																	
AUTOMATION, One		19-Sept-1971 00:00	Male	999 000 3351	Remove																
TESTTEAM, Twoppm	Leeds General Infirmary, Great George Street, Leeds, LS1 3ED	11-May-1934 00:00	Female	999 000 3564	Remove																

Viewing a LCG Patient Group History

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

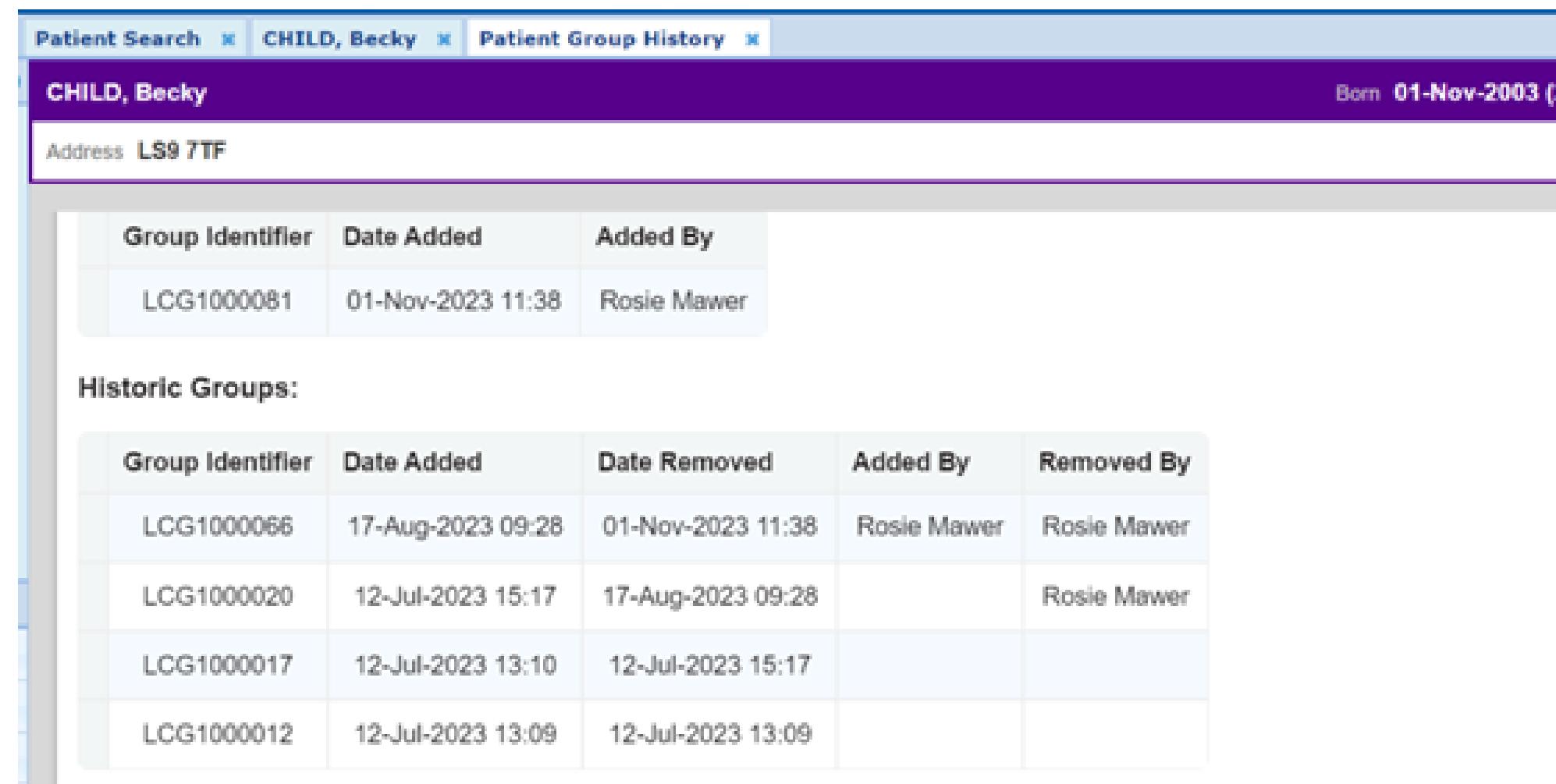
1



The screenshot shows the 'Patient Group History' section of the Single Patient View banner. The 'View Patient Group History' button is highlighted with a red box. Other buttons visible include 'View full GP Details', 'Patient Groups LCG 1000081', and 'View Patient Group History' (which is the target of the red box).

The **Patient Group History** is now Visible

2



The screenshot shows the 'Patient Group History' page for 'CHILD, Becky'. It displays the current group 'LCG1000081' and a history of previous groups:

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' dialog box. At the top, there is a search bar with 'Clinical genetics' typed into it, which is highlighted with a red box. Below the search bar are two dropdown menus: 'Show All' and 'Sort By Favourites'. A message 'In Progress (Drafts)' is displayed, followed by a note 'There are no draft documents'. The main area is titled 'Add New Document' and lists two items: 'Clinical Genetic Disease' and 'Clinical Genetics Clinical Note'. Each item has a star icon next to its name. To the right of 'Clinical Genetic Disease', there is a blue link 'Histocompatibility And Immunogenetics'. At the bottom right of the dialog box 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 identical to the one above, showing the 'Add Document' dialog box with the 'Clinical genetics' search term in the search bar. The 'Clinical Genetic Disease' eForm is listed in the 'Add New Document' section, and its star icon is highlighted with a red box. The 'Clinical Genetics Clinical Note' eForm is also listed below it. The 'Cancel' button is at the bottom right.

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**.

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**.

8

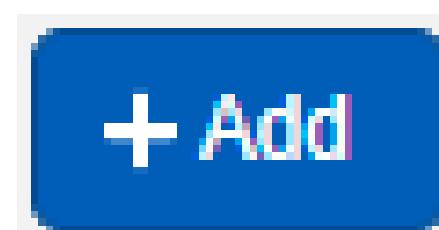
In the **Genotypes** section of the eForm, click into the **Genotype** box and insert the **Genotype/locus MIM number** or the name of the **Genotype**. Once you have found the name of **Genotype**, click on it.

9

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

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.



Phenotype

Phenotype

Search...

HPO

Status

Present

Absent

+ Add

12

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



Phenotype

3-METHYLCROTONYL-CoA CARBOXYLASE 2 DEFICIENCY, MCC2D

Status

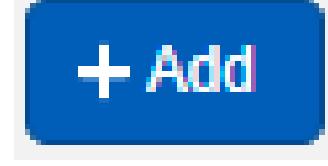
Present

Absent

+ 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**.

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 a 'Hospital/ICR' interface with a sidebar containing 'Actions' and 'Clinical Views' (which is currently selected). The main area displays a list of clinical events. A specific entry for '08-Jan-2024 Genetic Report Clinical Genetic Disease: LONG, Ha...' is highlighted with a red box. The list includes other entries such as '24-Nov-2023 Pathway eDAN - 18-Jul-2023 - LeedsTH', '27-Jul-2023 Summary Observations', and '24-Jul-2023 Alerts Data Quality'.

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 with a red box. Below these buttons, a message states 'Submitted forms will only be visible to members of the Clinical Genetics service'. The interface is divided into sections: 'Clinical Presentation' (with a 'Reason for Referral' field) and 'Clinical Genetic Diagnosis' (with fields for 'Disease' (ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1), 'Date' (23-Oct-2023), and 'Status' (Confirmed)).

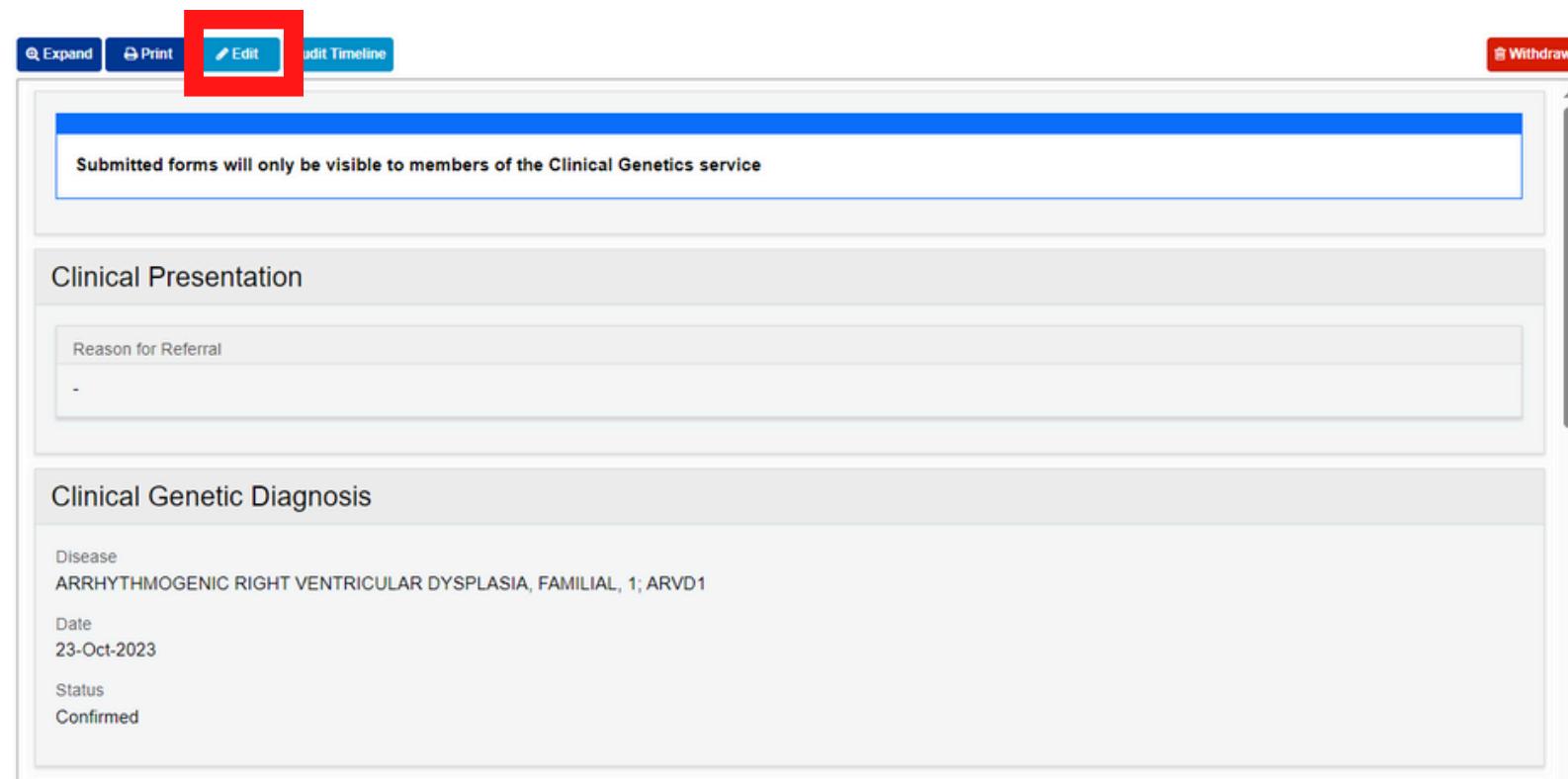
3

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

The screenshot shows the 'eForm' interface, similar to the previous one but with the 'Print' button highlighted with a red box. The 'Print' button is located at the top of the eForm interface, next to the 'Expand' button. The rest of the interface, including the 'Clinical Presentation' and 'Clinical Genetic Diagnosis' sections, remains the same.

4

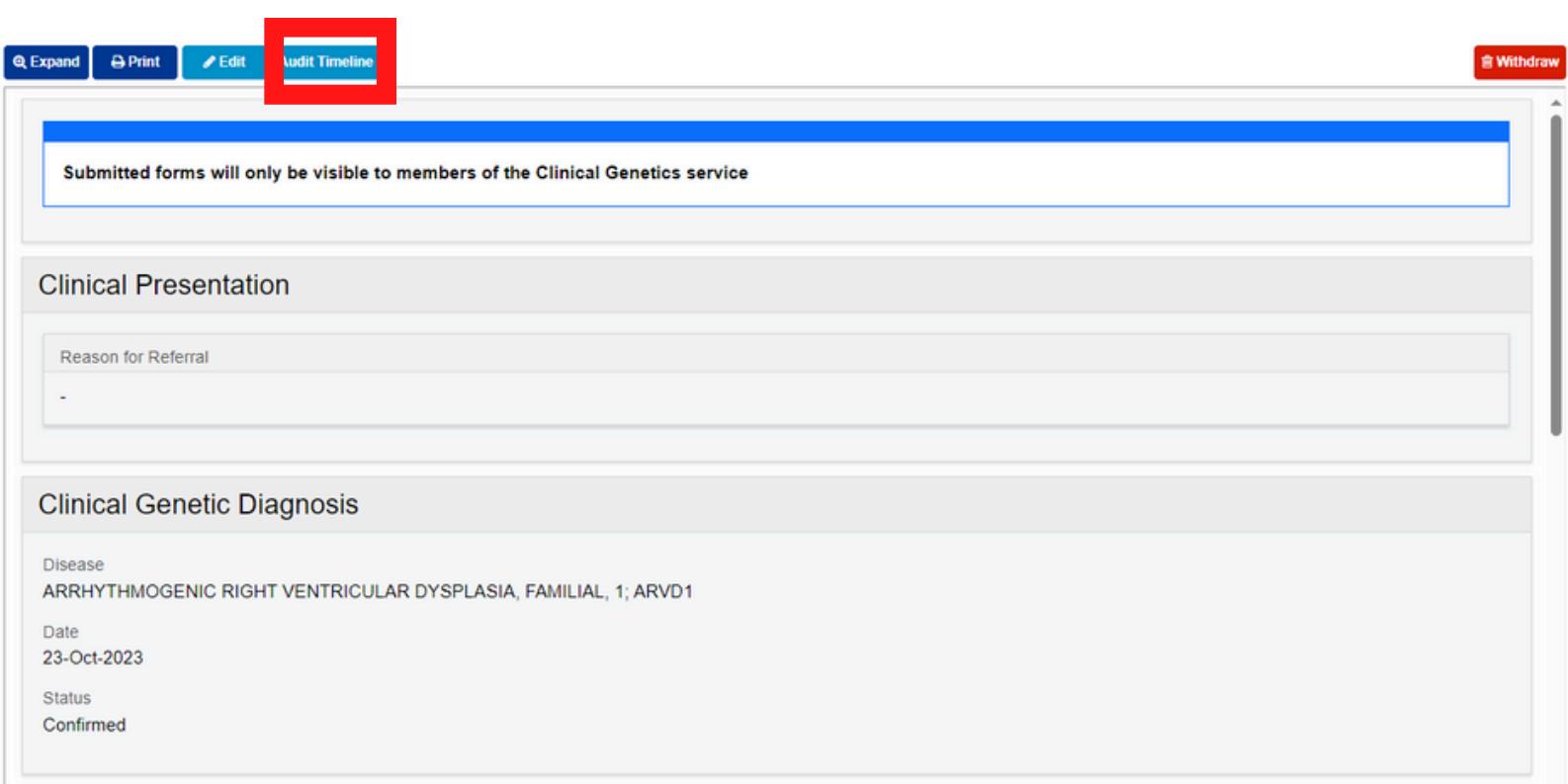
Click on the **Edit Button**, if you need to make any changes to the submitted **eForm**. The **eForm** will open again. When you have finished making any changes, click on **Submit**.



The screenshot shows a web-based eForm interface. At the top, there are buttons for 'Expand', 'Print', 'Edit' (which is highlighted with a red box), and 'Audit Timeline'. Below this, a message states: 'Submitted forms will only be visible to members of the Clinical Genetics service'. The form is divided into sections: 'Clinical Presentation' and 'Clinical Genetic Diagnosis'. Under 'Clinical Presentation', there is a field for 'Reason for Referral' with a dropdown menu showing a single option. Under 'Clinical Genetic Diagnosis', there is a 'Disease' field containing 'ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1', a 'Date' field showing '23-Oct-2023', and a 'Status' field showing 'Confirmed'. A 'Withdraw' button is located in the top right corner of the form area.

5

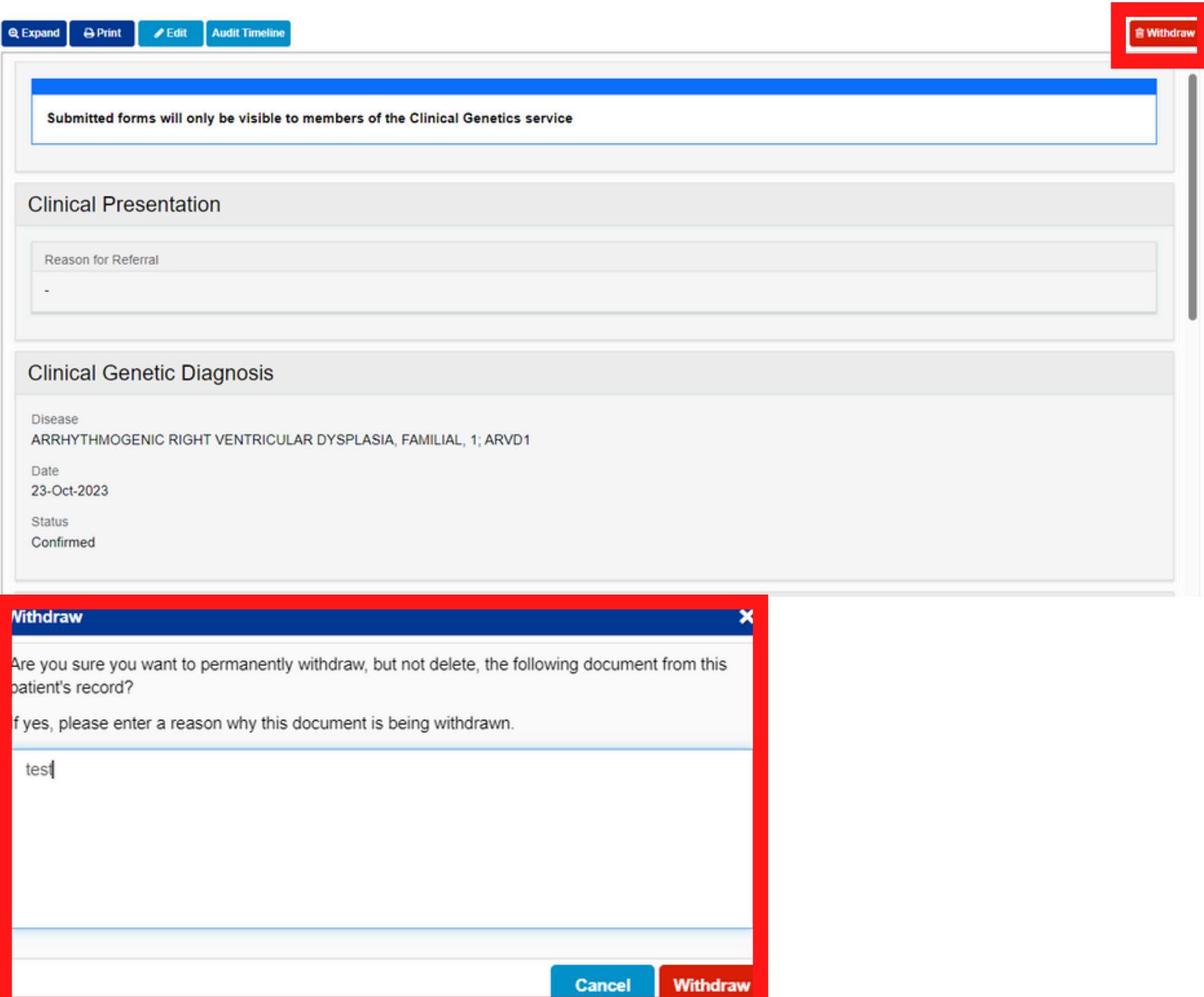
Click on the **Audit Timeline Button**, if you need to view the audit trail for the eForm. A timeline of the eForm will appear.



This screenshot is identical to the one above, showing the eForm interface with the 'Edit' button highlighted. The 'Audit Timeline' button is also highlighted with a red box. The form sections and data entries are the same as in the previous screenshot.

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**.

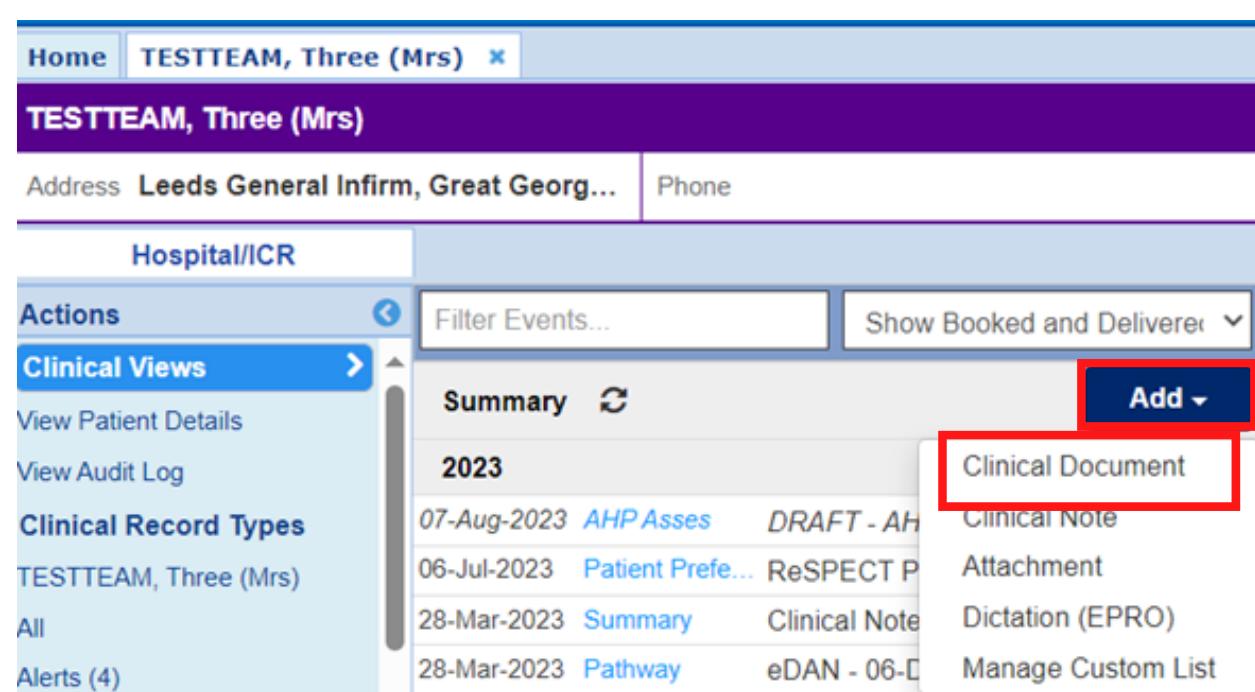


The screenshot shows the eForm interface with the 'Withdraw' button highlighted with a red box. A confirmation dialog box is overlaid on the page, titled 'Withdraw'. It contains the text: 'Are you sure you want to permanently withdraw, but not delete, the following document from this patient's record? If yes, please enter a reason why this document is being withdrawn.' A text input field contains the text 'test'. At the bottom of the dialog are 'Cancel' and 'Withdraw' buttons, with the 'Withdraw' button also highlighted with a red box.

Clinical Genetics Clinical Note

1

In the Single Patient View **Select 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.



3

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

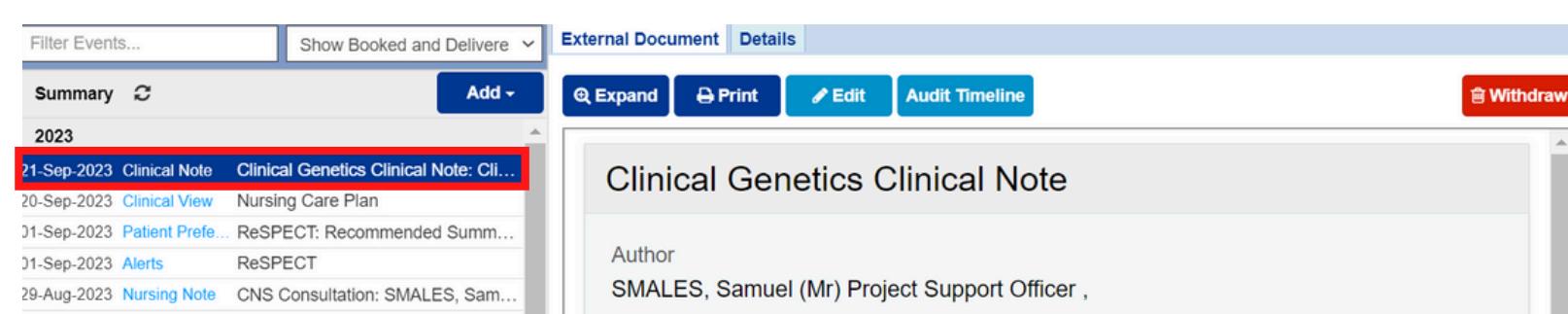
You can also attach an image to the **Clinical Genetics Clinical Note**. Please [click here](#) for the guide for on how to attach an Image.

Once completed select **Submit**.

The form includes fields for Author (LONG, Hayden (Mr) Digital System Support Officer, Acute Internal Medicine), Date of activity (21/11/2023), Time of activity (08:21), Profession (Select...), Specialty (Clinical Genetics), Type of note (General), Subject, Notes, and an 'Attach an Image' section with a 'Yes' button.

4

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

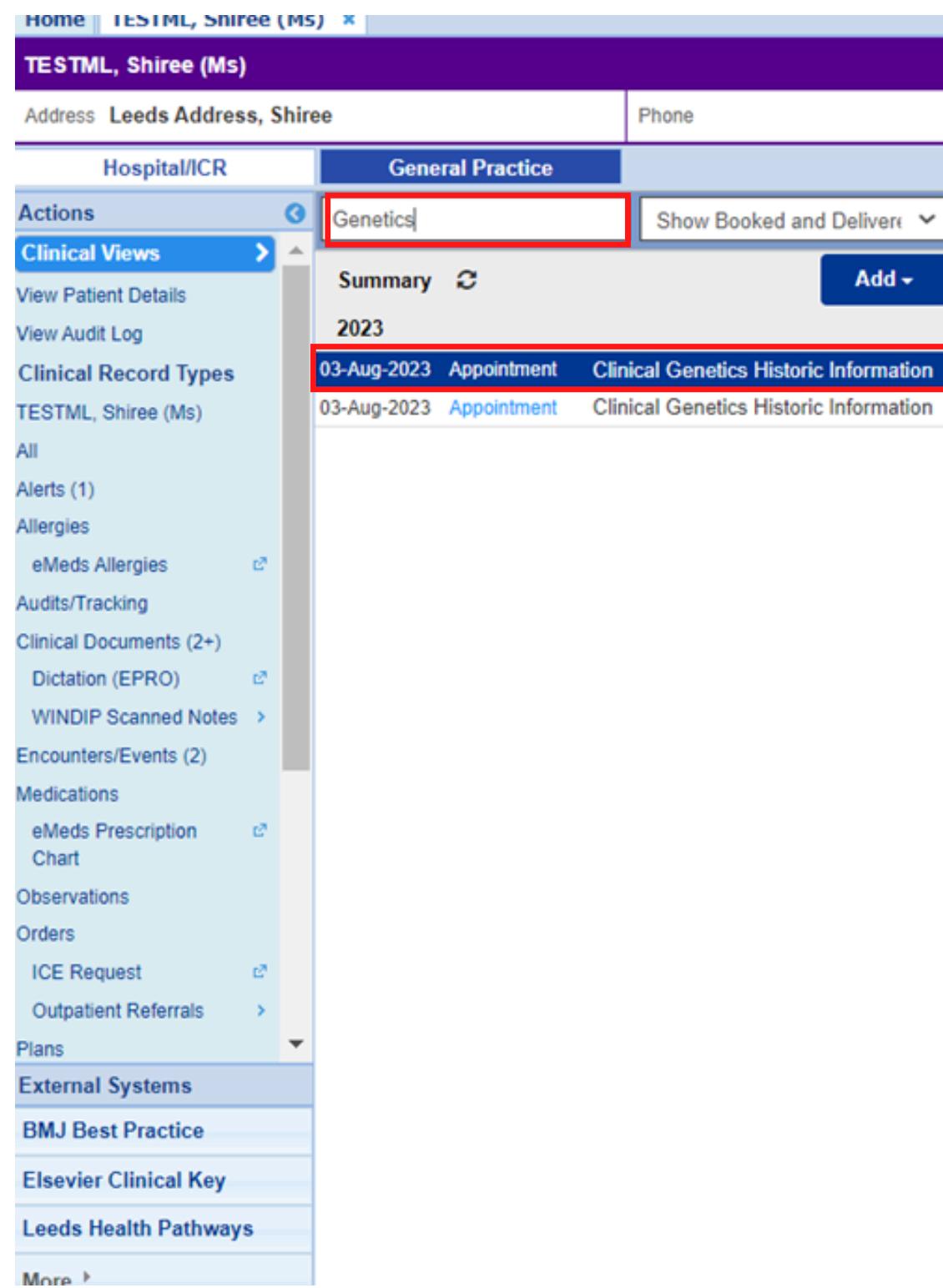


Please note, the **Clinical Genetics Clinical Note is only visible to Clinical Genetics team members**. If you want to add any information to a Clinical Note which is visible to all PPM+ users, please complete a Clinical Note - [Click Here](#) on how to complete a Clinical Note.

Viewing Clinical Genetics Information Recorded in PPM+

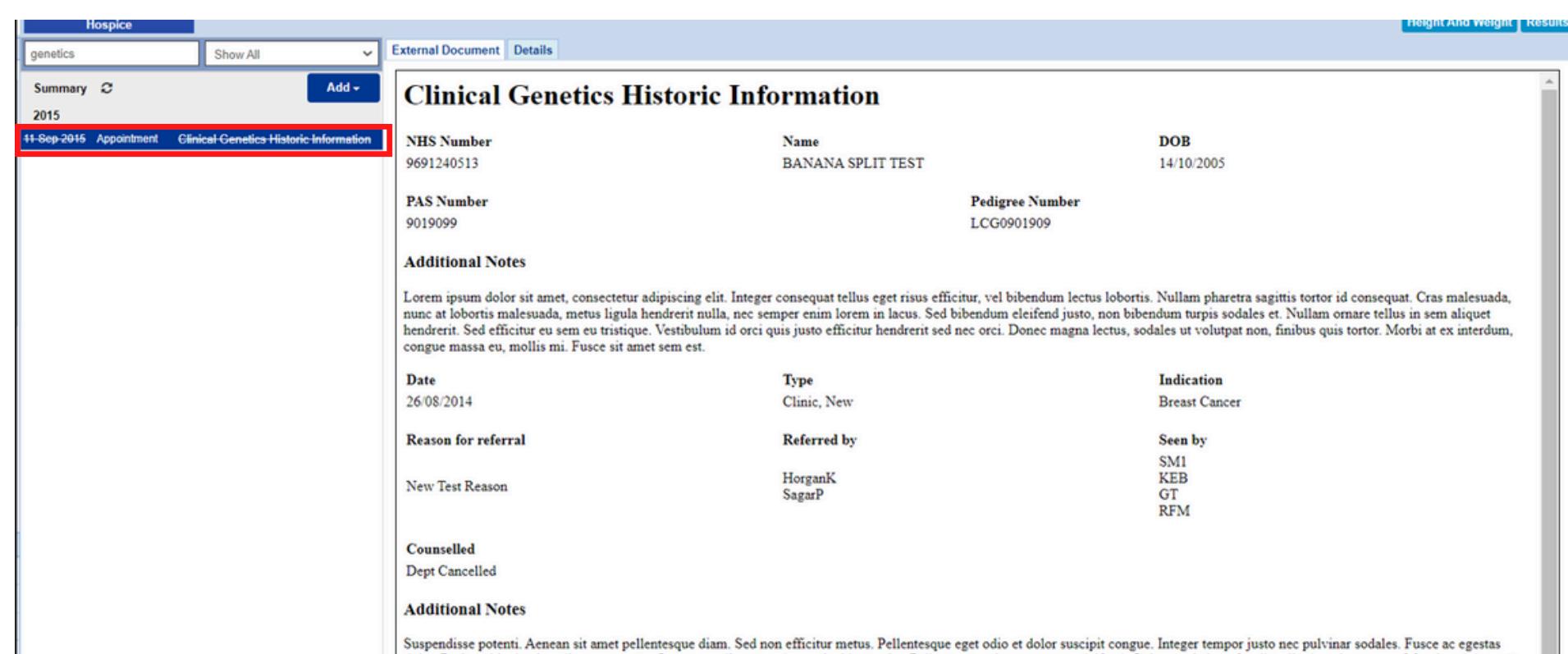
1

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



2

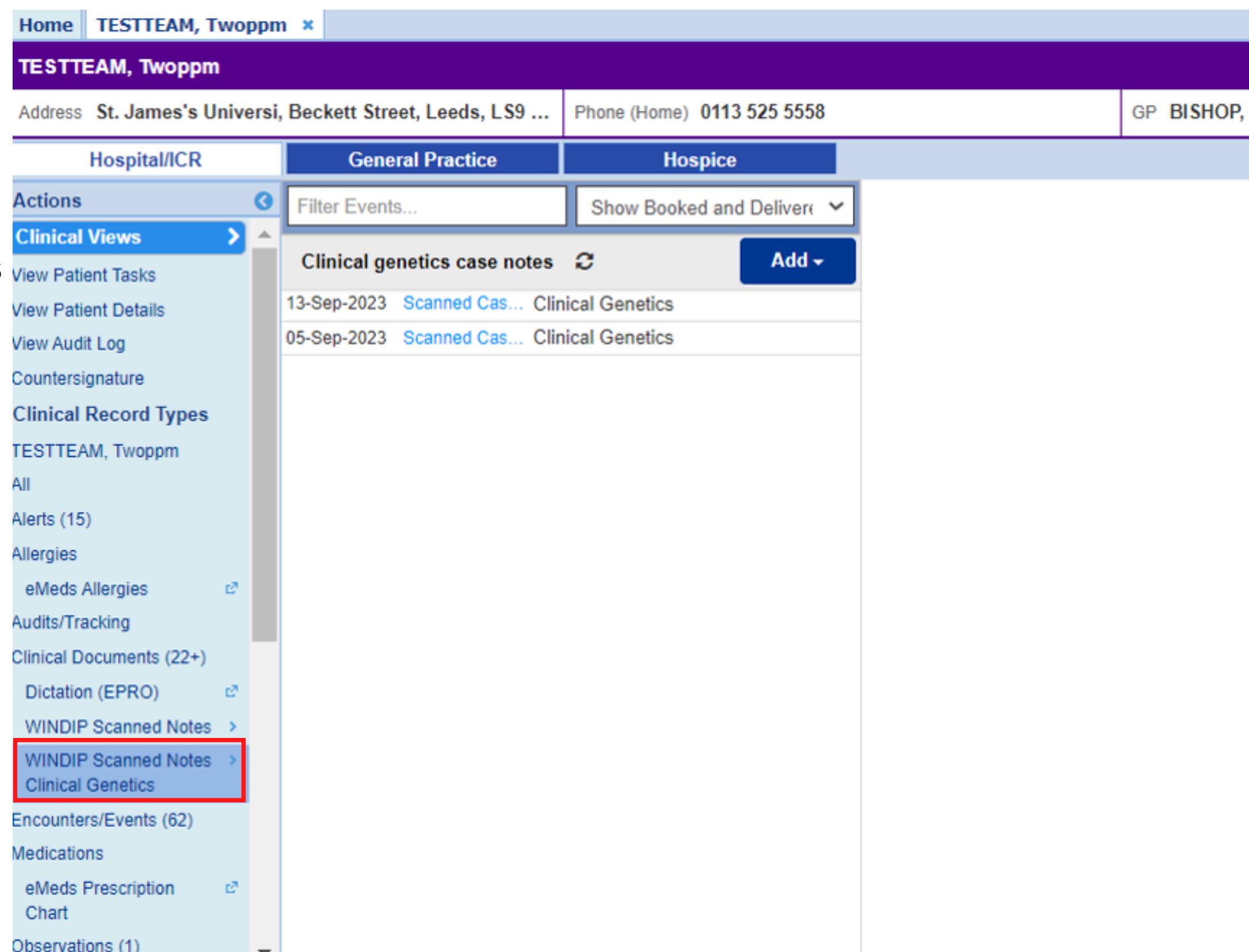
Select the document you want to view.



How To View WINDIP Scanned Documents in PPM+

1

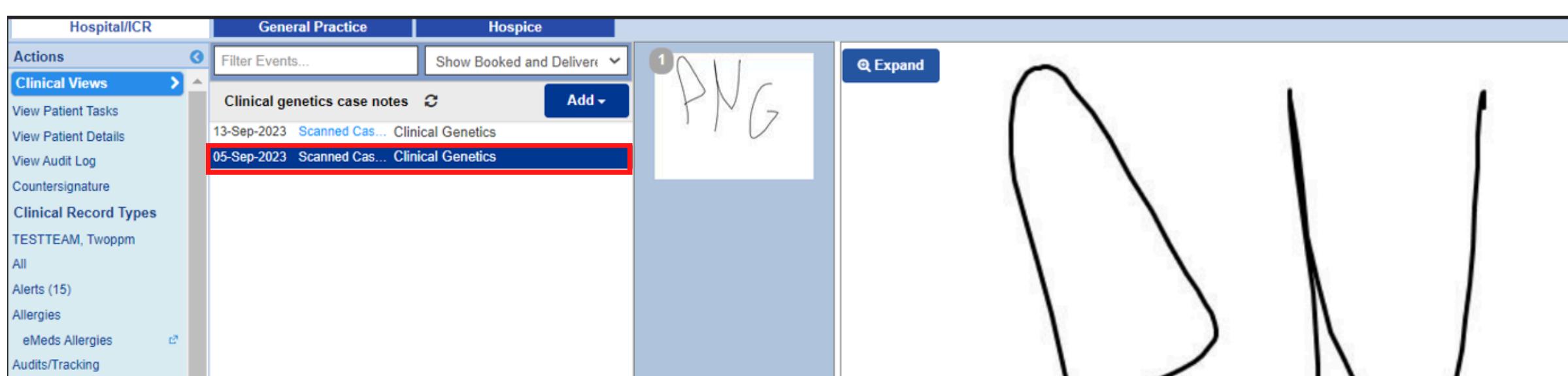
In the Single Patient View, Select WINDIP Scanned Notes Clinical Genetics.



The screenshot shows the PPM+ software interface. At the top, there is a header bar with 'Home' and 'TESTTEAM, Twoppm'. Below the header, there are three tabs: 'Hospital/ICR', 'General Practice', and 'Hospice'. The 'General Practice' tab is selected. On the left, there is a sidebar with 'Actions' and 'Clinical Views' expanded. Under 'Clinical Views', the 'WINDIP Scanned Notes' option is highlighted with a red box. The main content area shows a list of 'Clinical genetics case notes' with two entries: '13-Sep-2023 Scanned Cas... Clinical Genetics' and '05-Sep-2023 Scanned Cas... Clinical Genetics'. There is also a 'Clinical Genetics' button in the main content area.

2

Select the Document you wish to view.

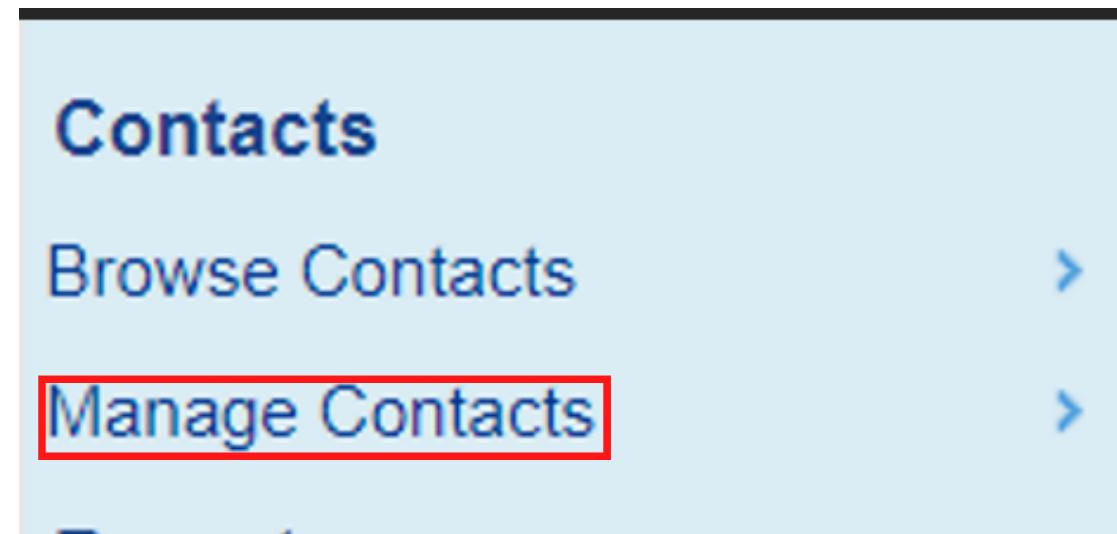


The screenshot shows the PPM+ software interface. The 'General Practice' tab is selected. In the main content area, a document is previewed. The document content is a scanned image of handwritten text 'PN'. There is a 'Q Expand' button next to the document preview.

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					
<input type="button" value="Search"/>					
Action	Name	Job Title	Type	Specialty	Code
	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	

4

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

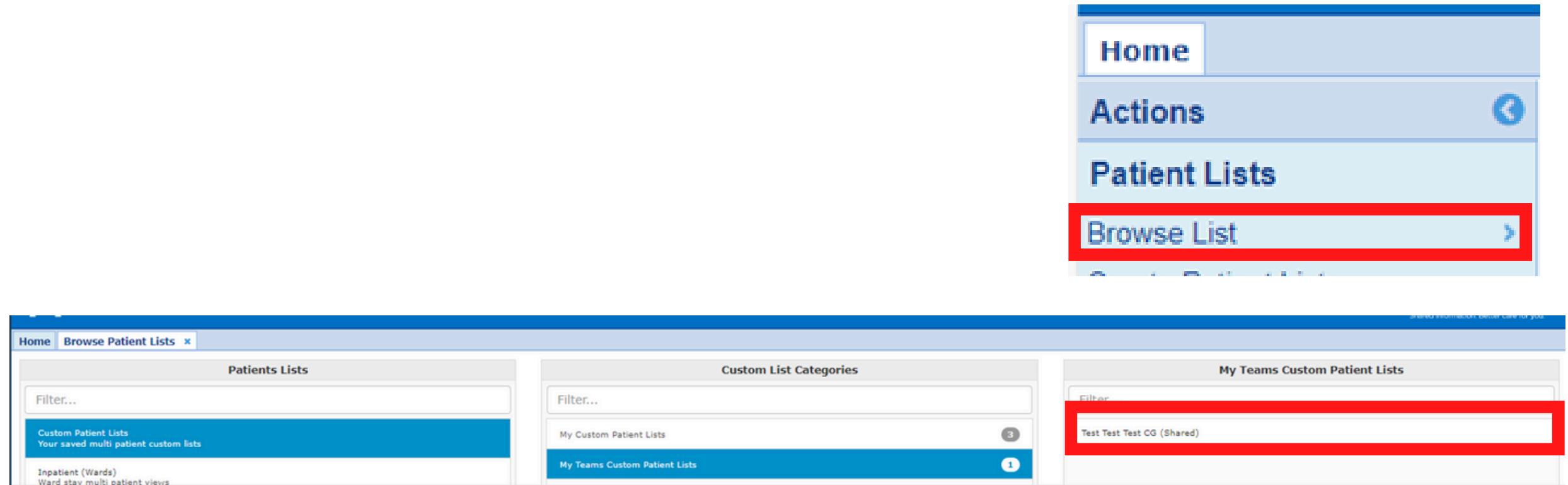
Team Details		Team Membership			
	Membership	Contact Name	From	Until	Core Member?
	Profile	AUTO_TESTCAT4_5, SJ (Mr) : St James's University Hospital (Admin)	21-Jun-2019		Core
		BARNETT, Jack (Mr) : St James's University Hospital (Other)	21-Jun-2019		Core
		MANTRI, Aparna : Patient Administration, Level 4, St James's Institute of Oncology (Admin)	21-Jun-2019		Core
		MARSHALL, Luke (Mr) : St James's University Hospital (Admin)	18-Jun-2019	12-Jul-2023	Core
		MCKENZIE, Jacob (Master) : St James's University Hospital (Admin)	21-Jun-2019		Core
		PULMONARY FUNCTION TESTS DEPARTMENT, Sdf (Sister) : St James's University Hospital (Other)	03-Jan-2023	04-Jan-2023	Core
		SMAI ES, Samual (Mr) : St James's University Hospital (Admin)	19-Jun-2023		Core

How to find a Teams Custom list

1

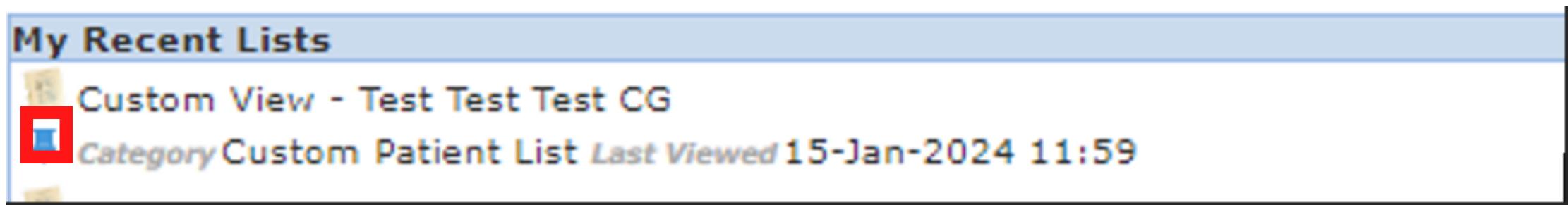
To find your teams list from the Home Screen **By Selecting Browse List,**

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.

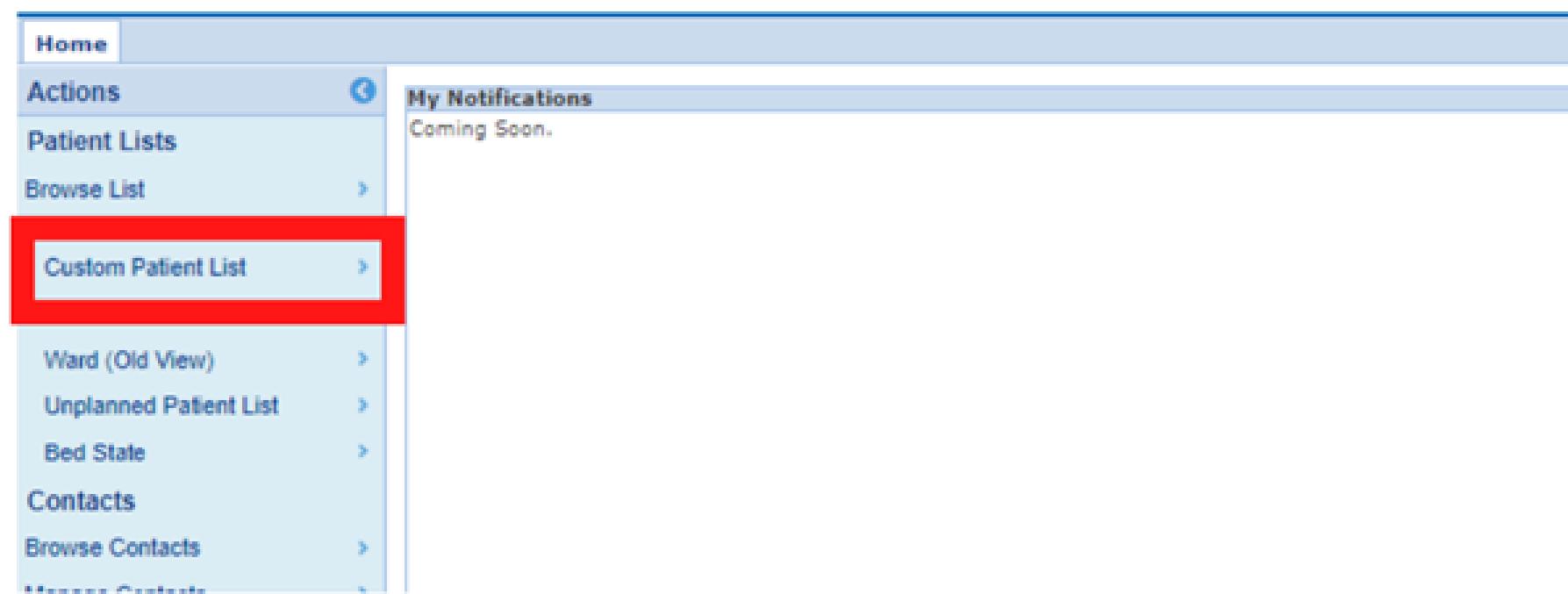


To Create a Custom List for Your Assigned Clinical Genetics Tasks

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.**

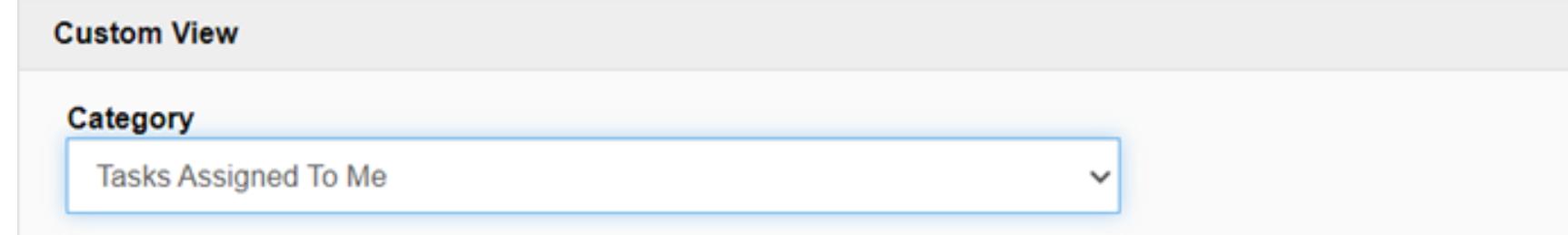
1

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



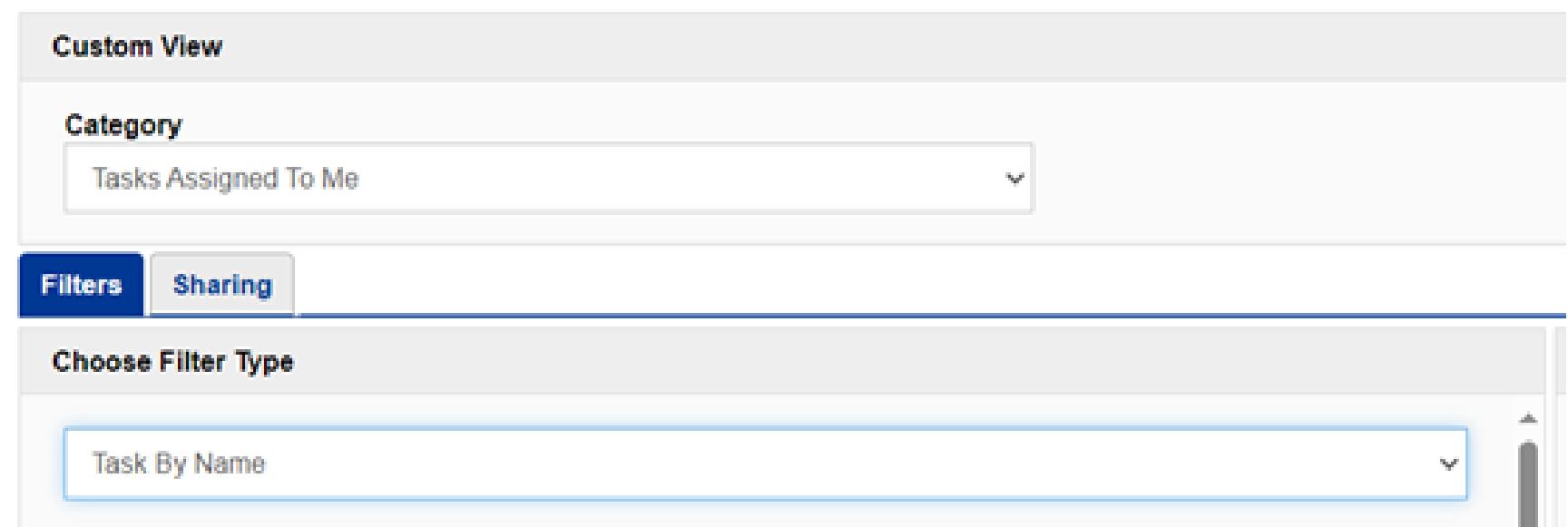
2

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



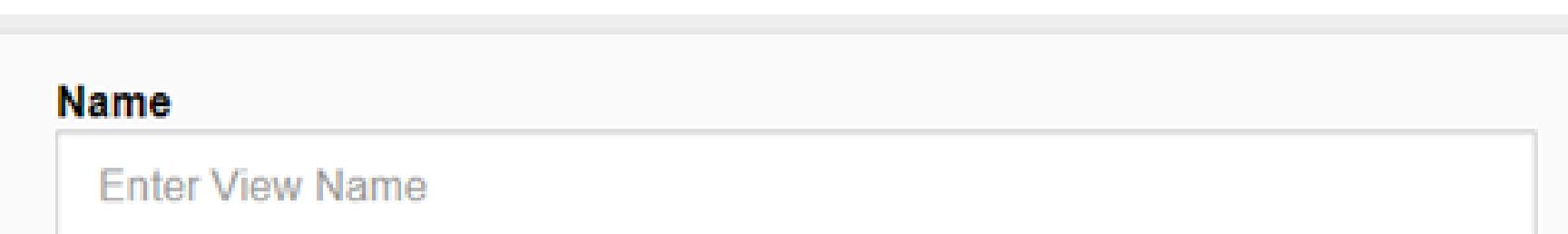
3

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



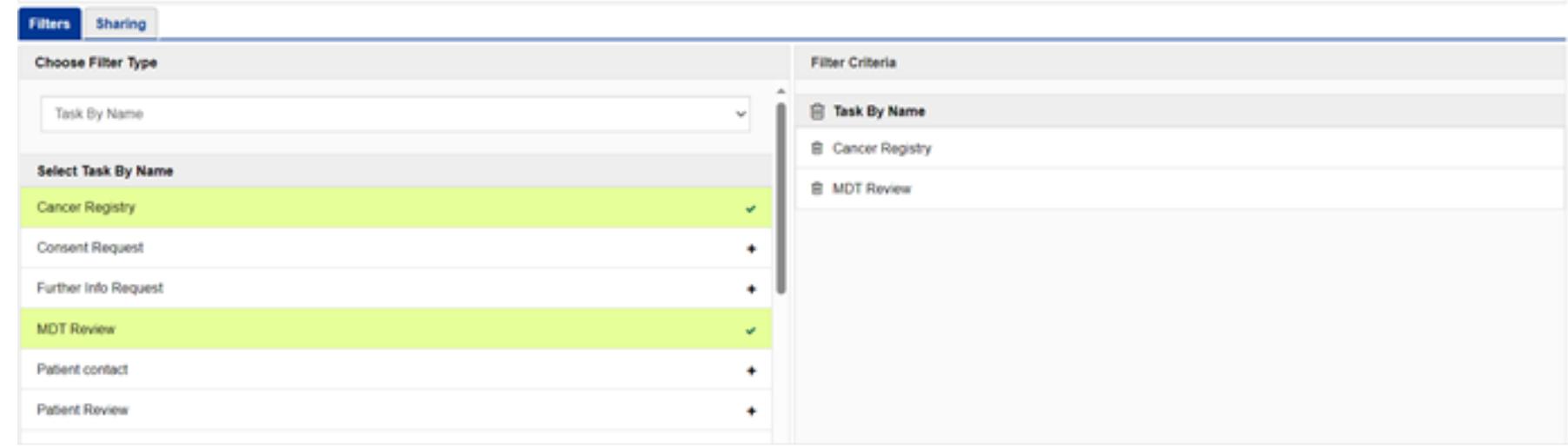
4

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



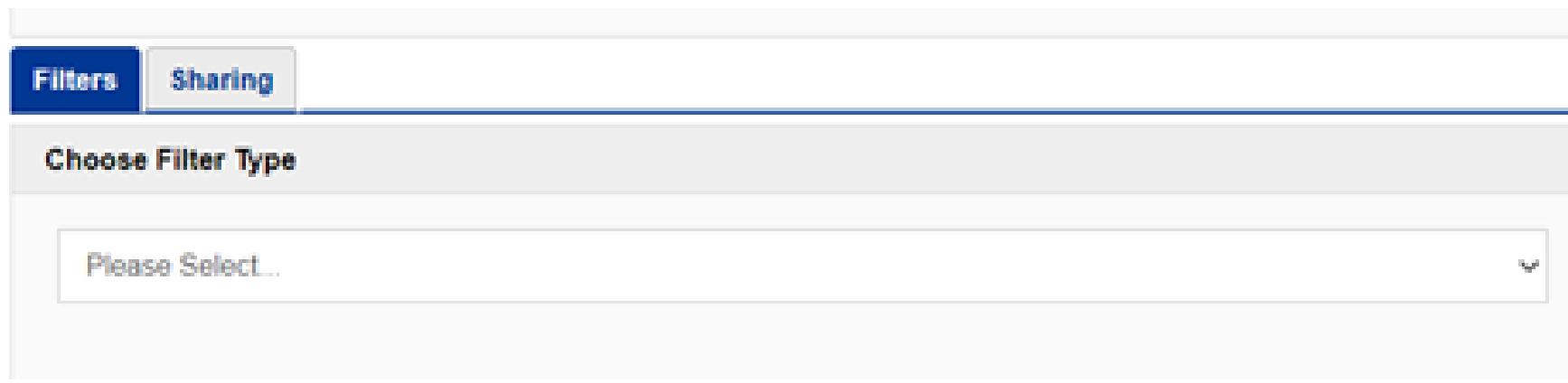
5

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



6

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



7

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

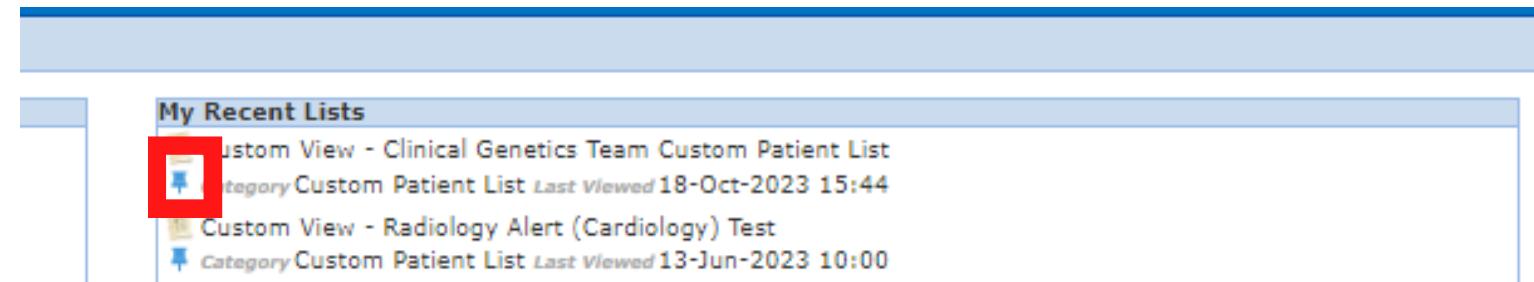
Please Note - If you are creating a list of tasks assigned to you and want to share your list with a colleague e.g a Consultant sharing a list of their tasks to their PA, please make sure the list has been shared with the relevant colleague within the sharing tab.

How to find your tasks assigned to me

Custom list

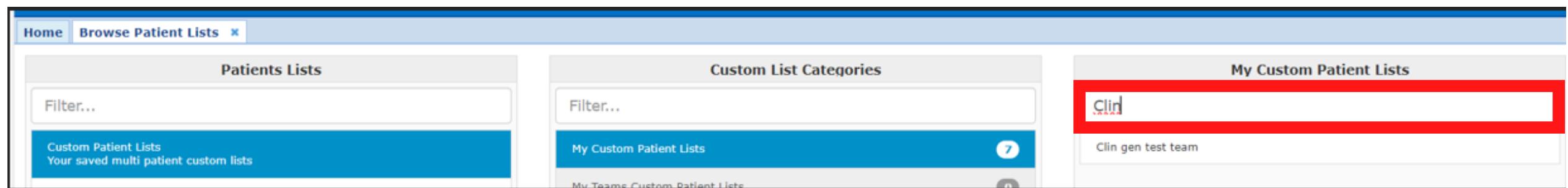
1

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**.



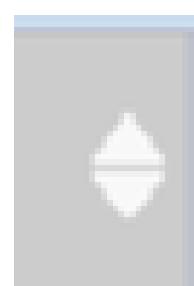
To find out more about creating, viewing and editing Custom Patient Lists by [Clicking Here](#).

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.**

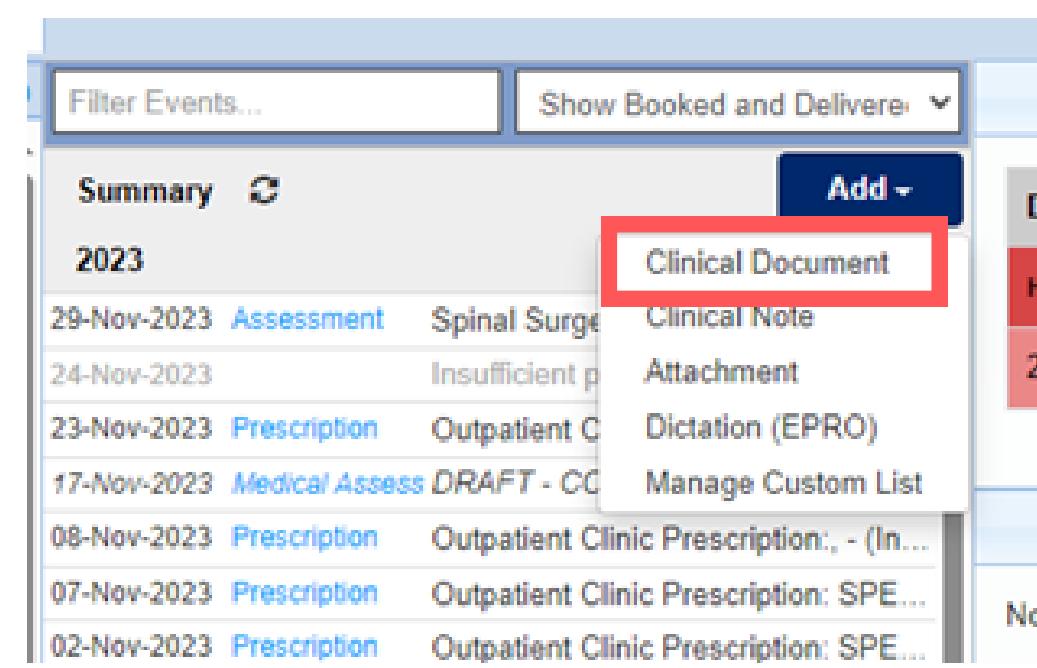
You can use the arrows at the top of a column to sort the list



Creating an Assign to Specific Team or User Adhoc Task

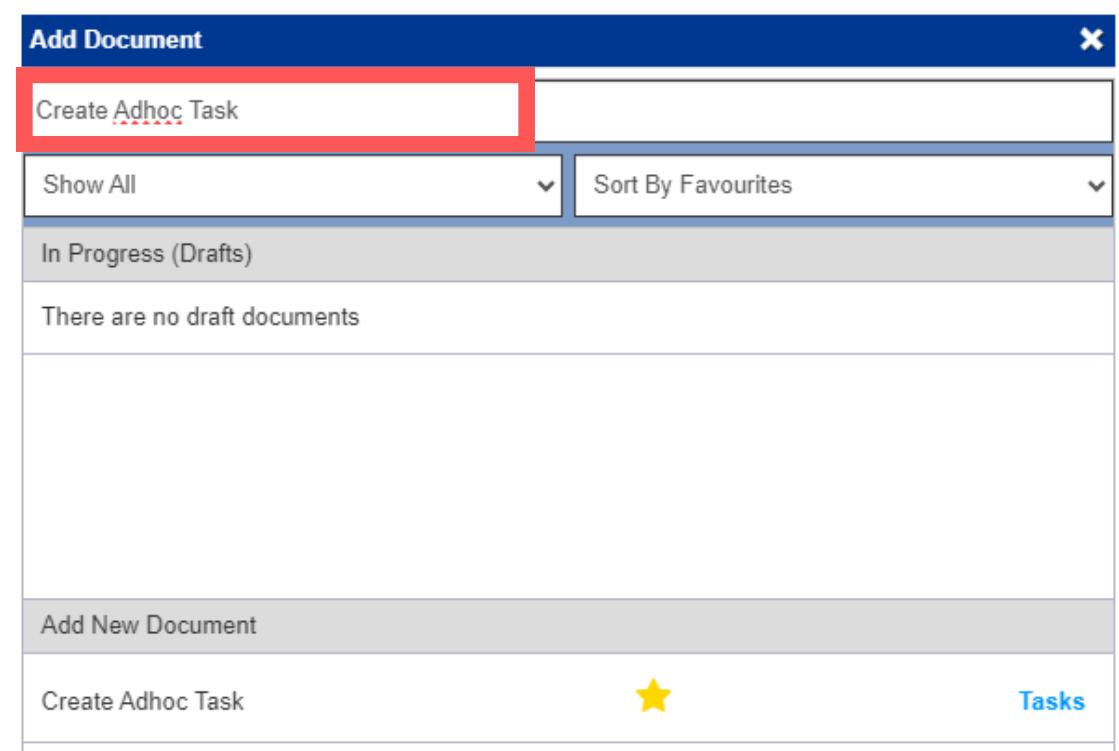
1

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



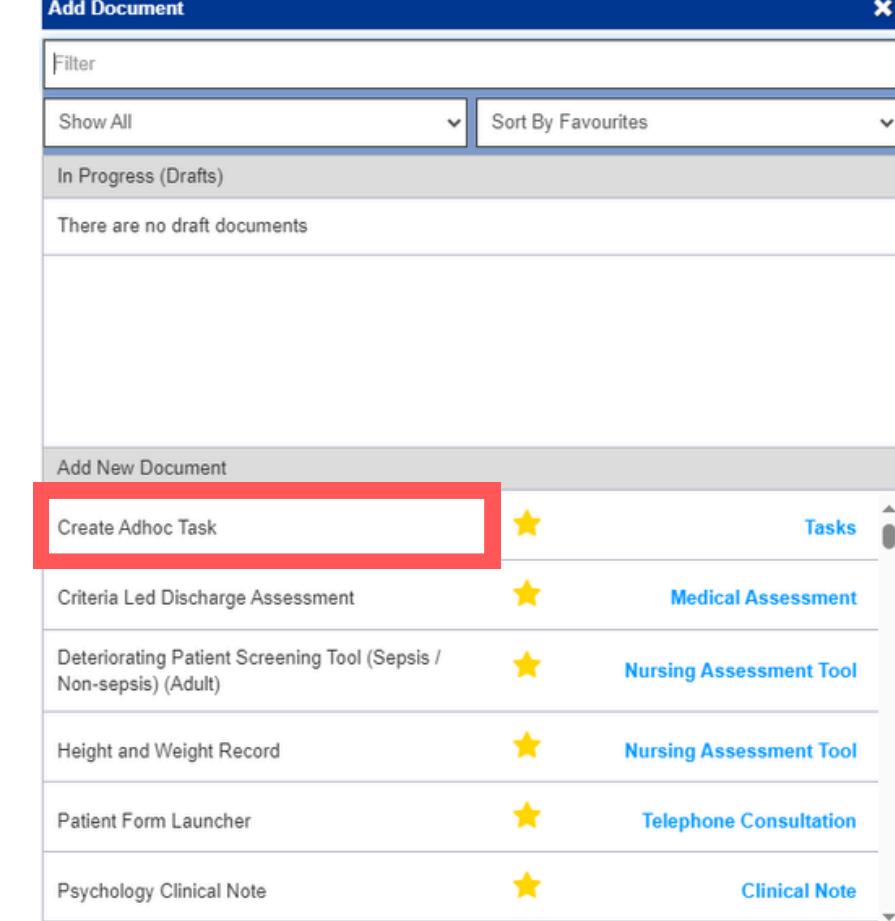
2

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**.

Ad Hoc Task Type *

Generic Assign to specific team or user

Team *

Select...

Clinical Genetics Appointments

Clinical Genetics Associates

Clinical Genetics Consultants

Clinical Genetics Counsellors

Clinical Genetics Medical Records

Clinical Genetics PPA - Cancer

Clinical Genetics PPA - Cardiac

Clinical Genetics PPA - General

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.

Team *

Clinical Genetics Appointments

The team the task will be assigned to. (Only teams set-up to receive Ad Hoc Tasks are listed. Please raise a support request if you would like your team adding in.)

Assignee

Search...

7

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

Task Name *

Select...

Assessment Required

Book Meeting

Book Transport

Cancer Registry

Confirm Start Date Of Social Care Provision

Consent Request

Contact Next Of Kin

Correspondence

8

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

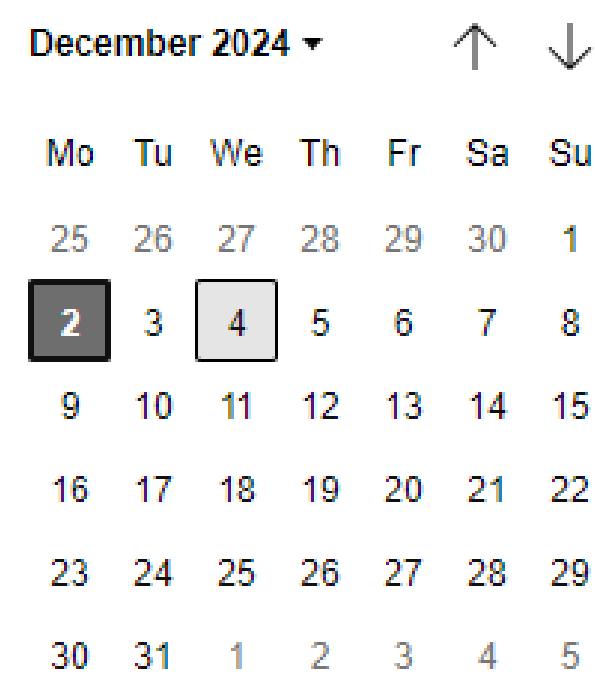
Click on an individual **field picker's icon** to amend that **Due Date** or **Time**, as required.

Due Date *
02/12/2024
02-Dec-2024
The datetime the task becomes 'Due' (Orange)

Due Time *
17:24

Overdue Date *
02/12/2024
02-Dec-2024
The datetime the task becomes 'Overdue' (Red)

Overdue Time *
17:24



9

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

Task Profession *

Admin & Clerical

Case Manager

Chaplaincy

Dietetics

Discharge Co-ordinator

Dispensary

Doctor - Consultant

Doctor - Other Resident

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**.

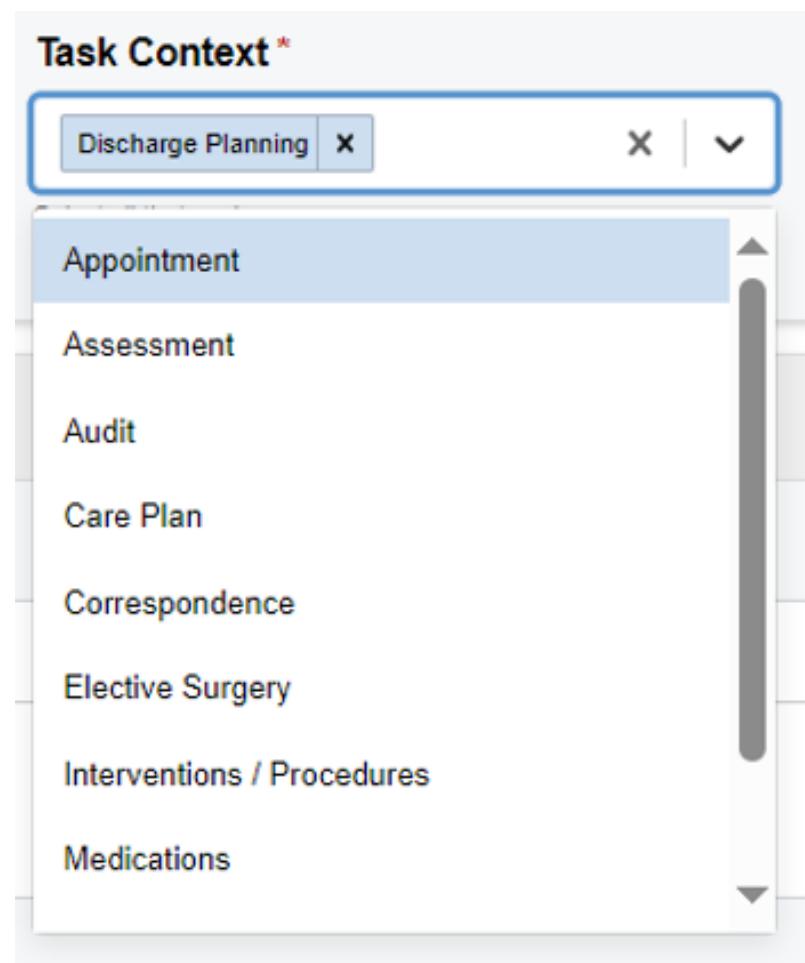
Task Profession *

Admin & Clerical

Select all that apply

11

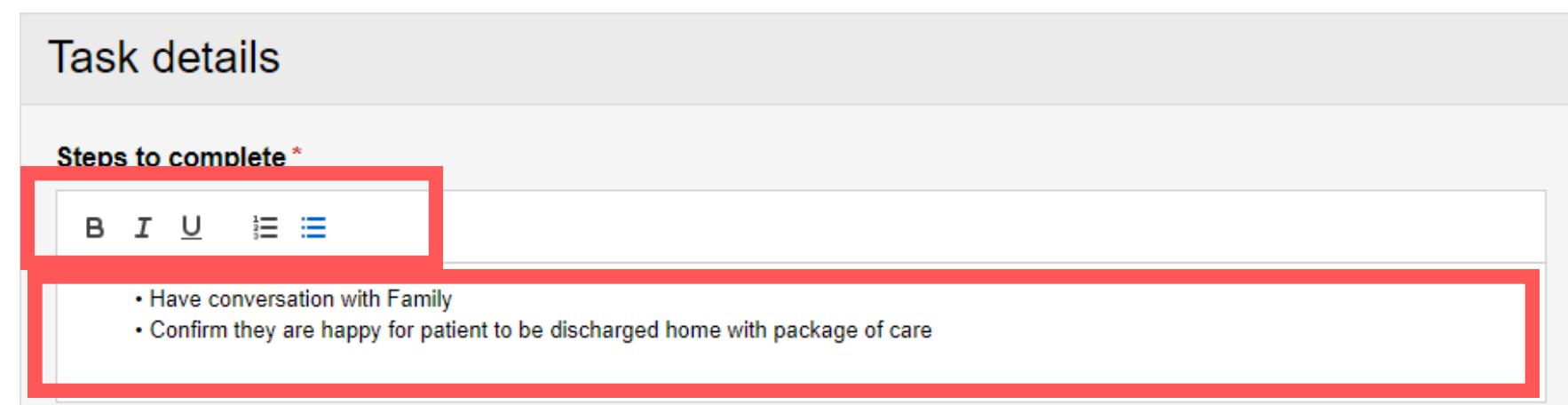
When you have chosen to add tasks to a specific team, the **Task Context** box can be edited by using the drop down box.



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 ▾	Print
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
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 Withouttof-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	Consultant
	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'.

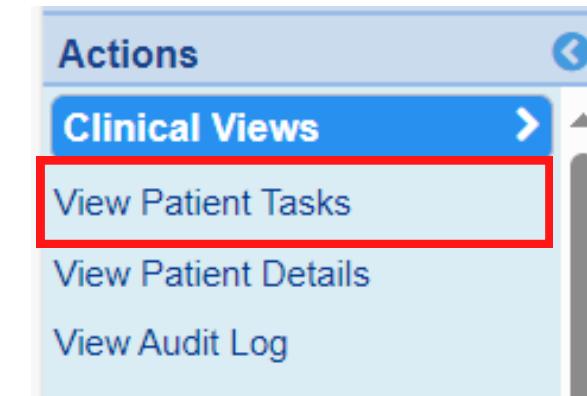
3

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	Actions
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
Bed Unassigned																			
	TEST EPR ZZZ		TESTCAF One	14y		448d 20h 11m	4 (4 overdue)		Medicine	449d			?	On Ward					
	TEST EPR ZZZ		TESTCAF Three	14y		445d 2h	4 (4 overdue)		Medicine	445d			?	On Ward					
	TEST EPR ZZZ		TESTCAF Two	14y		445d 2h 17m	4 (4 overdue)		Medicine	445d			?	On Ward					
	TEST EPR ZZZ		TESTCHECKWA Withouttof-Edited	24y		245d 23h 2m (WA)	1 (1 overdue)		MSA	Surgery	WA			On Ward			Check recent results, Complete...	IV acc Phi 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.

7

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

Discard

8

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

Submit

9

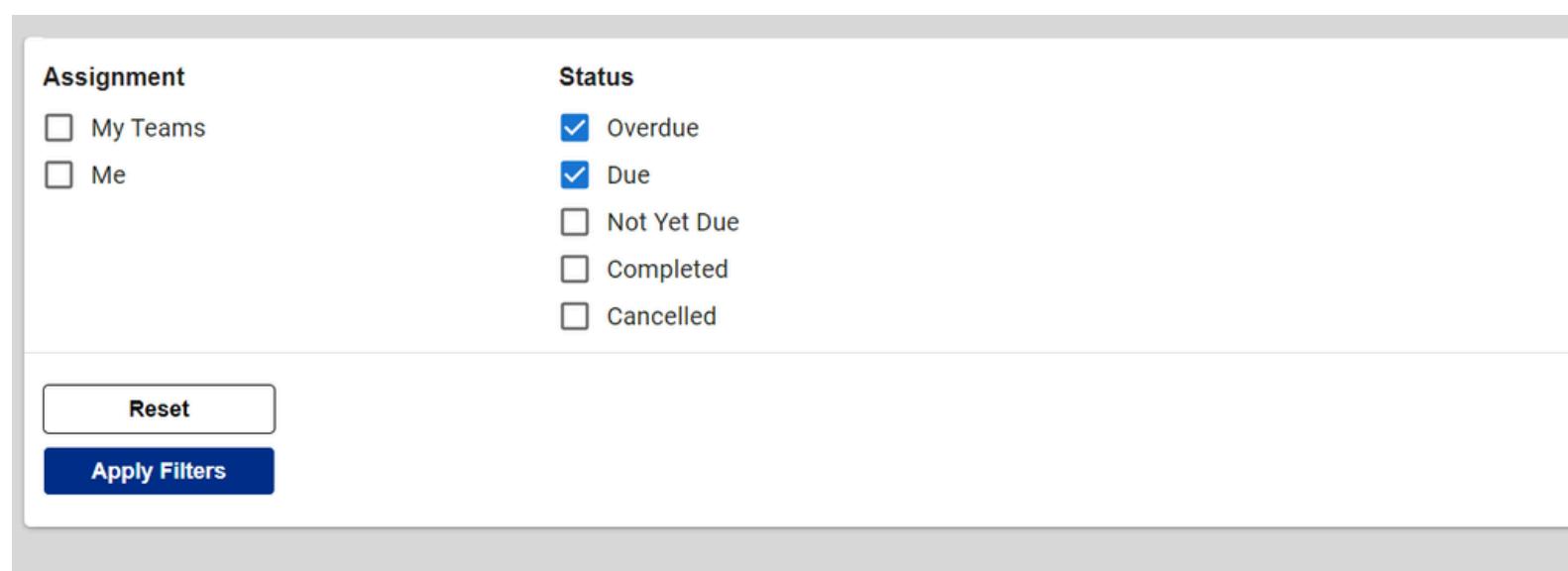
It is possible to filter the **tasks window display** you see in the **Patient's Task window** by clicking on **More**.

 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

11

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



12

When you are happy with the **filters** you have selected, click on **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:

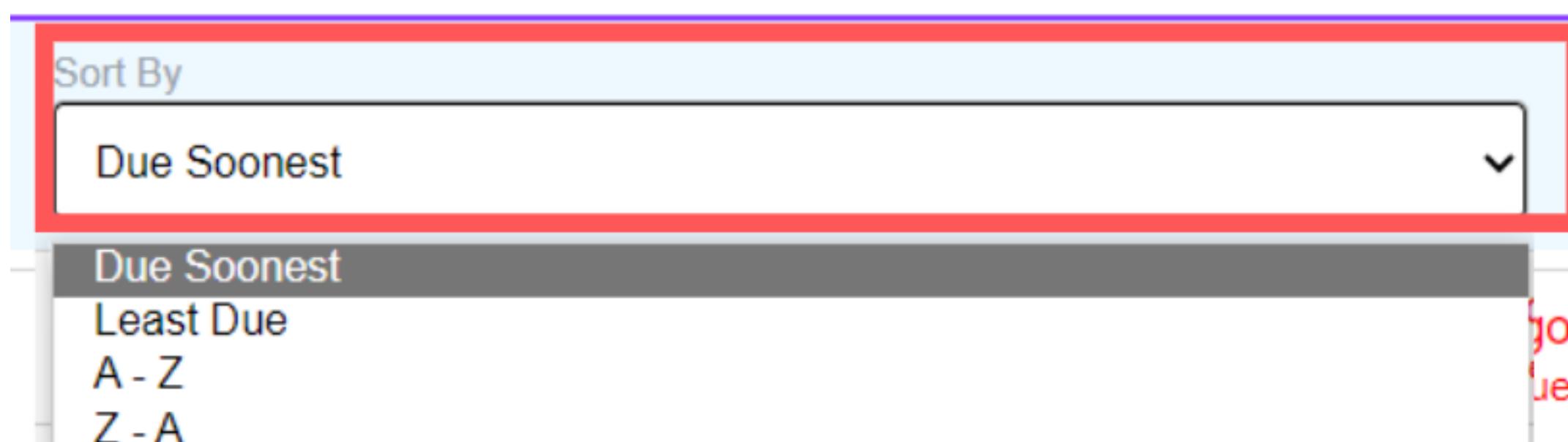
Height and Weight (Adult)	1 Day Ago >
Height and Weight (Adult)	... 1 Day Ago >
Height and Weight (Adult)	1 Day Ago >
Redacted	1 Day Ago >

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

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

14

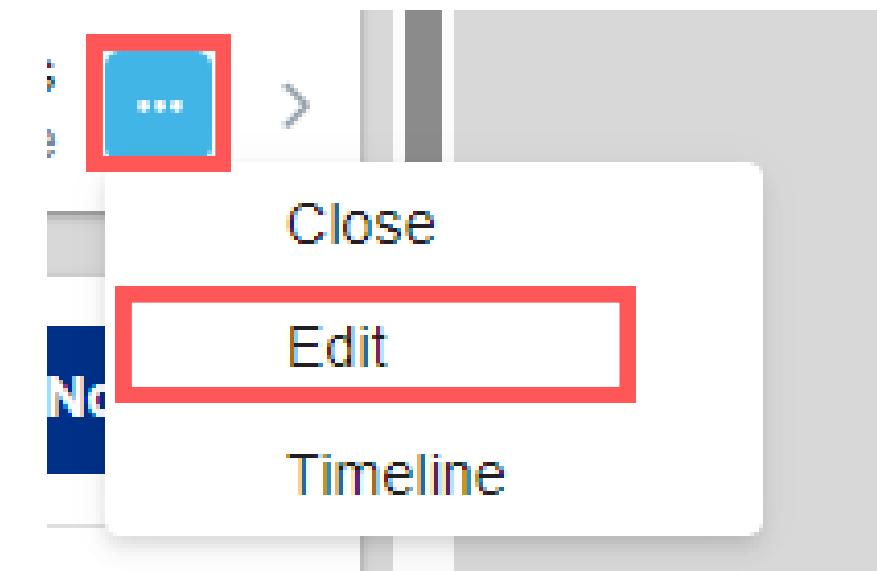
You can sort the **Task window** for your Patient by **Due Soonest, Least Due, A - Z and Z - A**. Click within the **Sort By** field to select how you wish to sort the **Task window**.



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 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**.

5

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

6

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

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**.

8

Then, click on **Submit**.

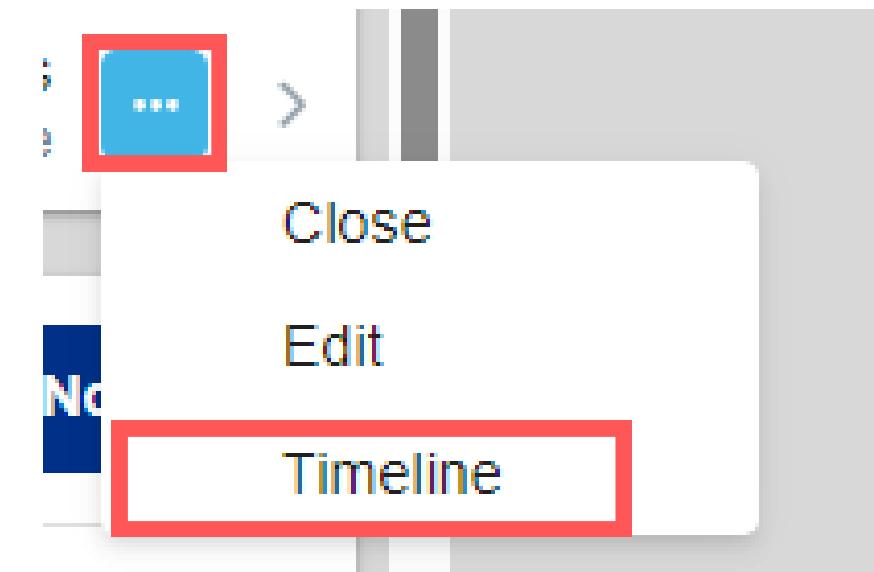
A green rectangular button with the word "Submit" in white, bold, sans-serif font. The button has a slight shadow and is centered horizontally.

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

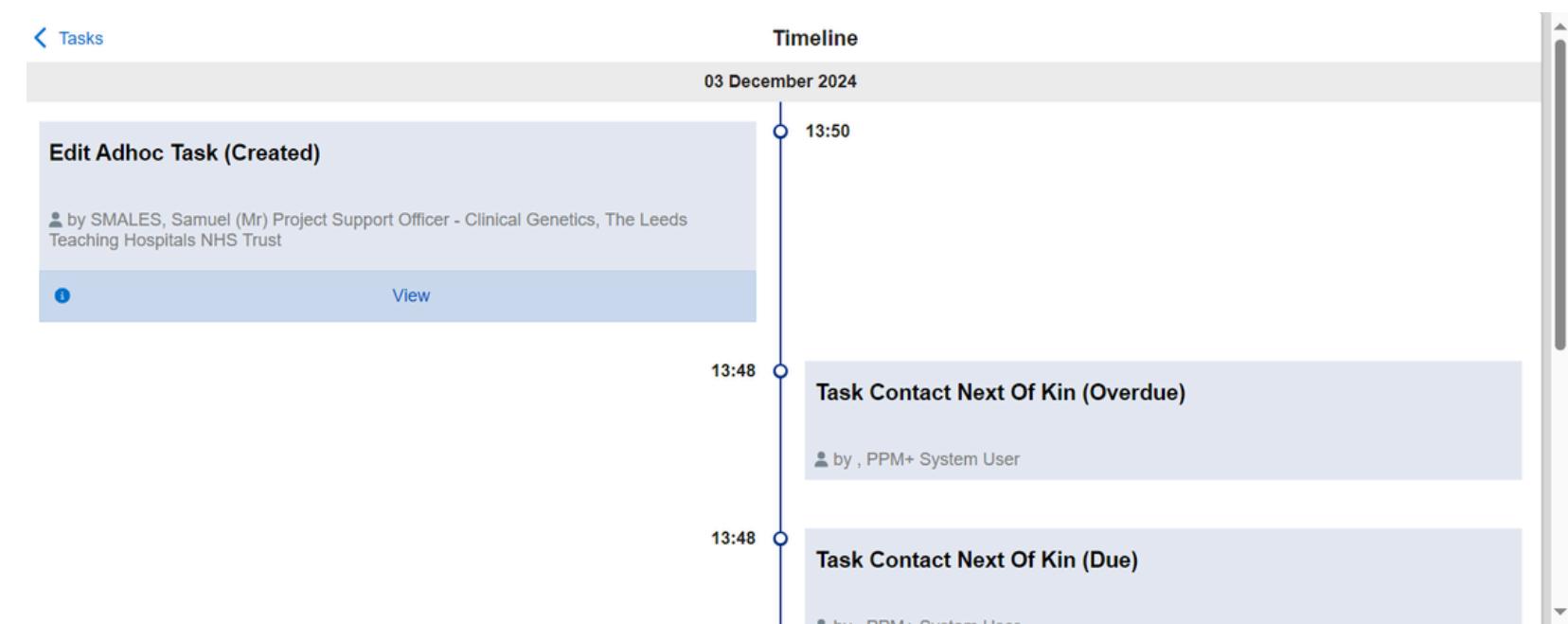
1

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**.

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 ⓘ										Select Columns
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 Mlc		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			

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.

1

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 ⓘ										Select Columns
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 Mlc		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

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](tel:x26655)



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



PPM+ Help Site: <https://www.ppm-support.leedsth.nhs.uk/>

