ppm+

Clinical Genetics

USER GUIDE

NHS

The Leeds
Teaching Hospitals
NHS Trust

Contents page

For further information please contact:

✉ **leedsth-tr.ImplementationTeam@nhs.net or**   📞 **0113 206 0599**

How To Create 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 a contact in PPM+.
Please <u>Click Here</u> 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.**
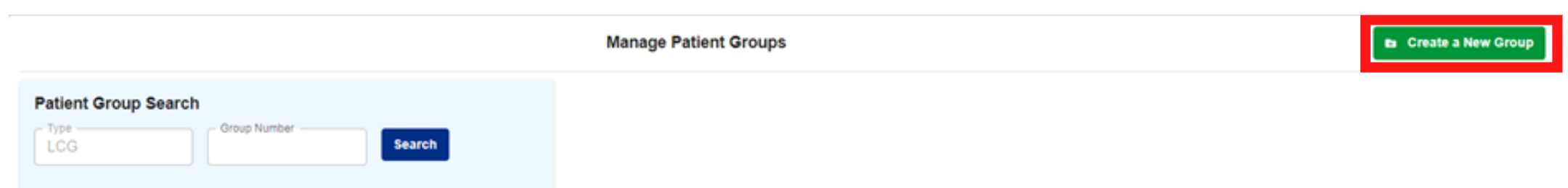
1 To create a **LCG Patient Group**, from the left hand side panel, **Select Manage Patient Groups.**
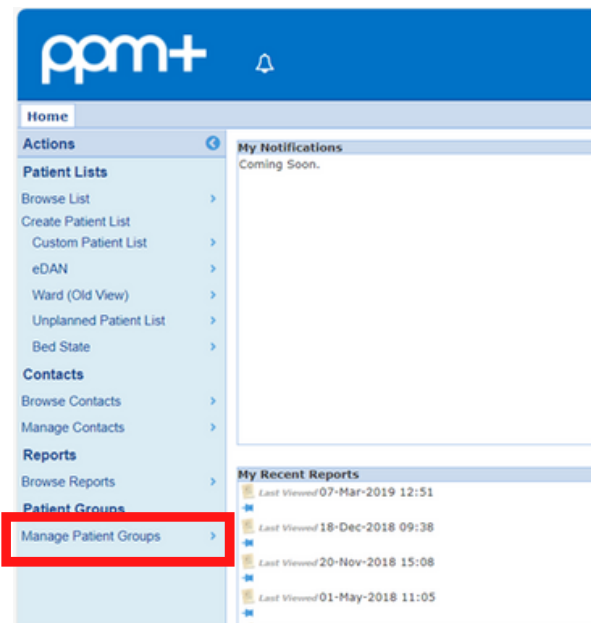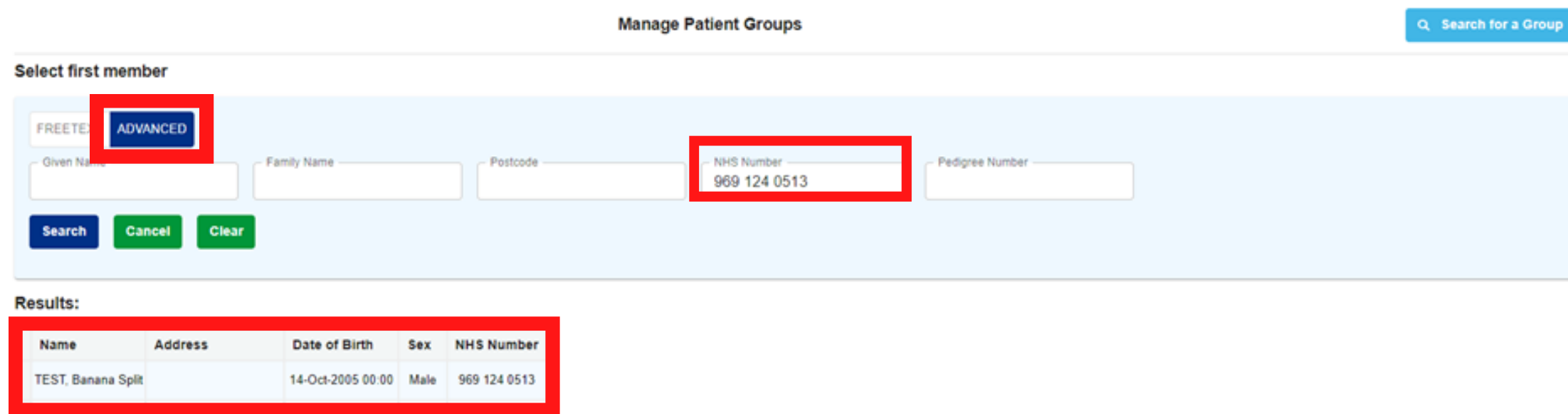
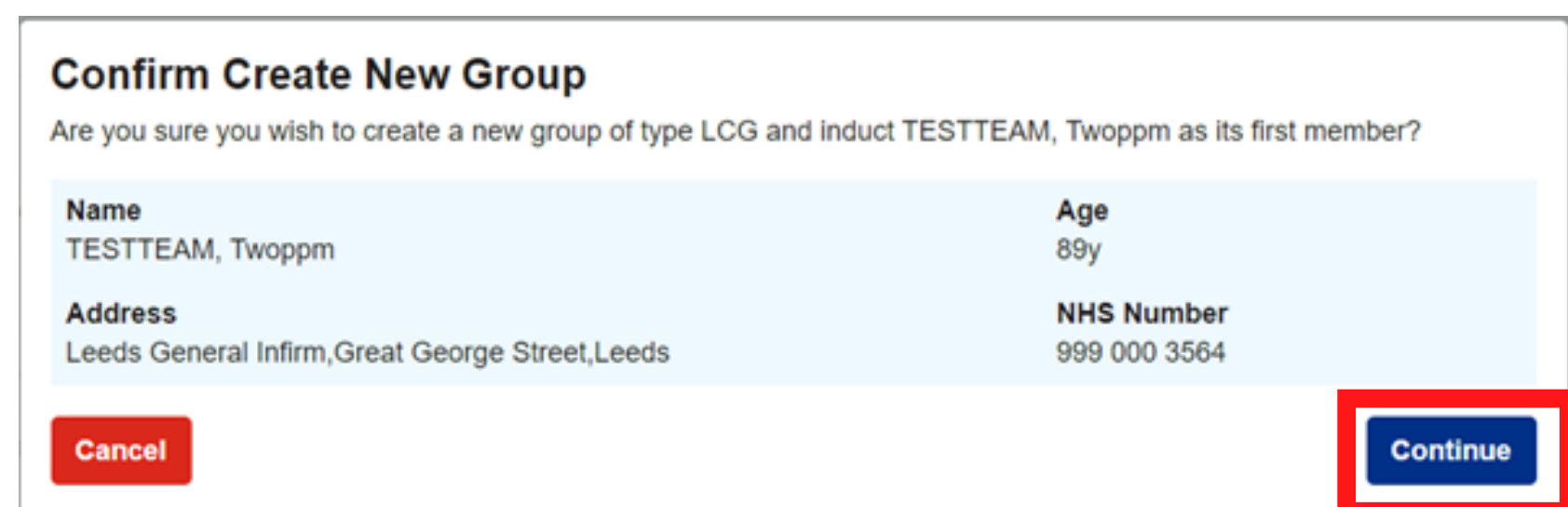**2** Select **Create a New Group.**

3 Select **The Advanced Tab**, enter the **Patient's NHS Number** and click **Search**. Then Select the **Patient.**
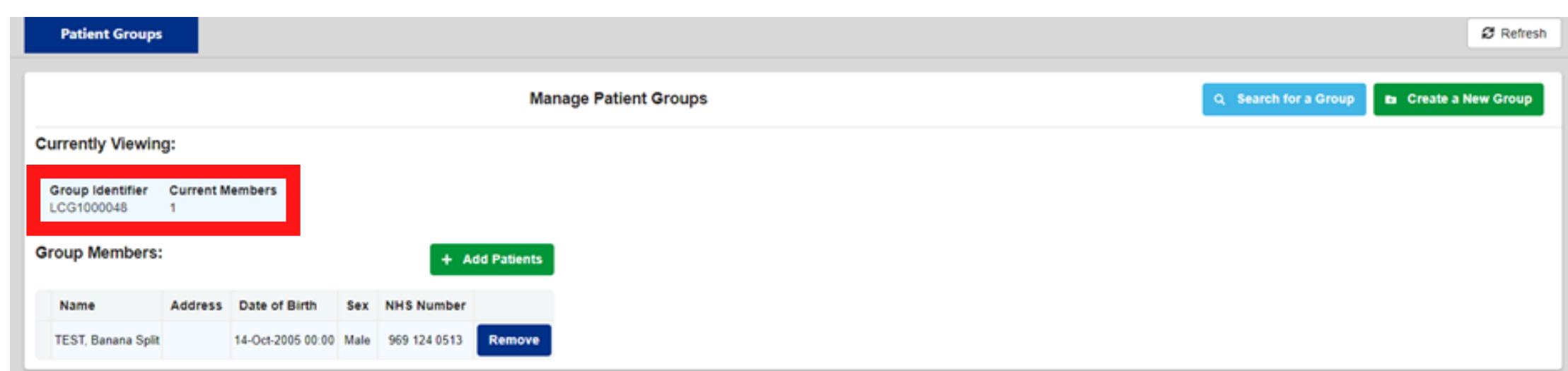
4 You will be presented with a box asking you to confirm you wish to create a new group of type LCG and add your patient as the first member? **If correct, select Continue.**

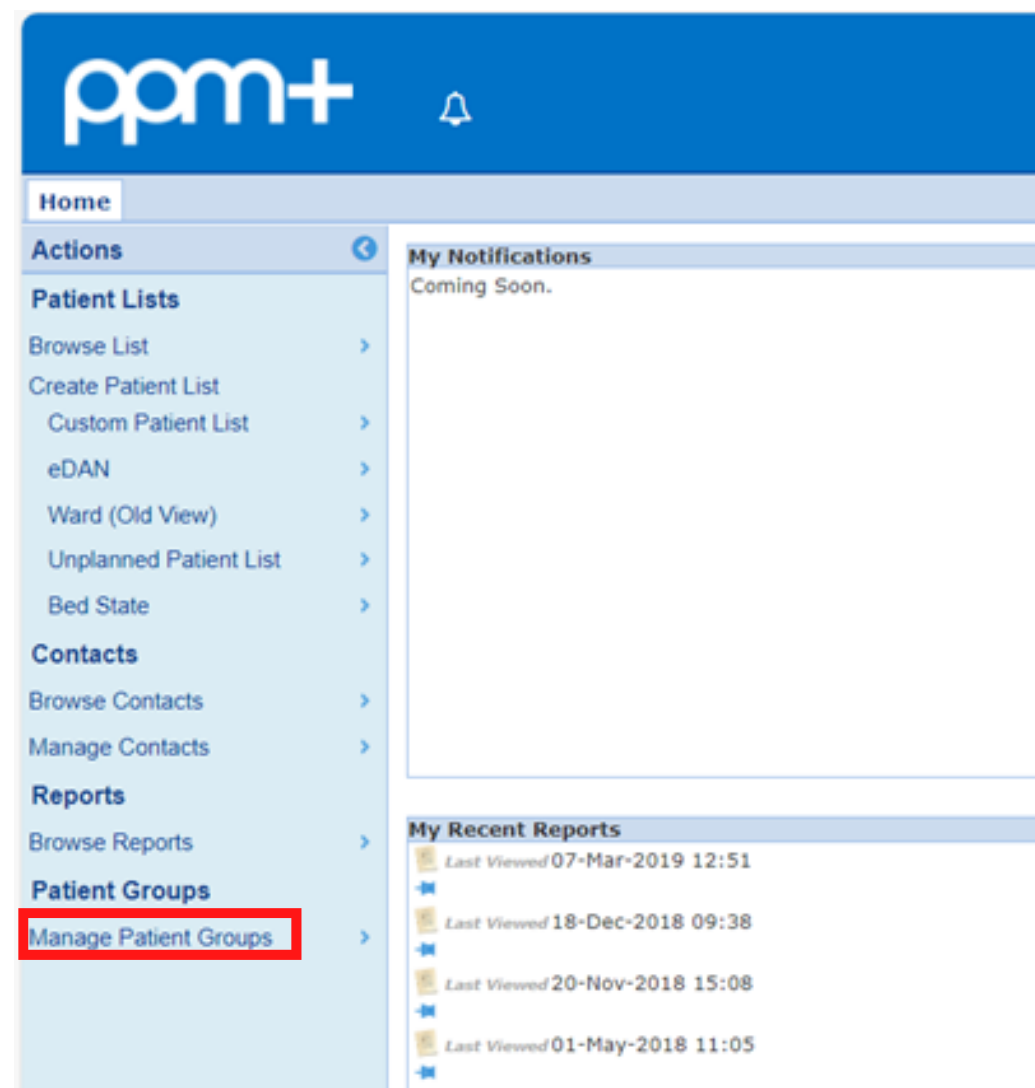**5** The Patient Has now been **Assigned a Group.**

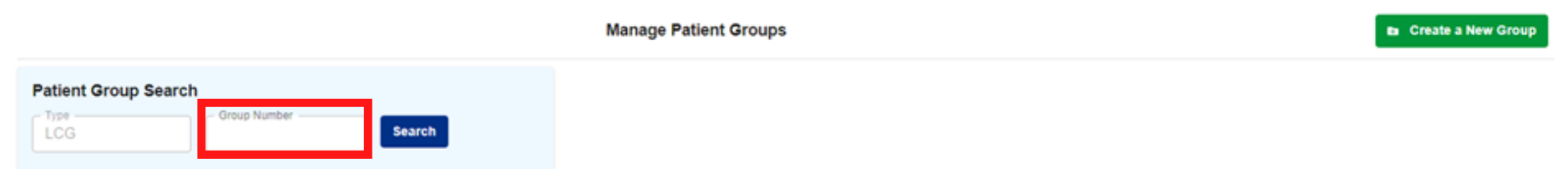# Adding an Additional Patient to a Leeds Clinical Genetics (LCG) Patient Group

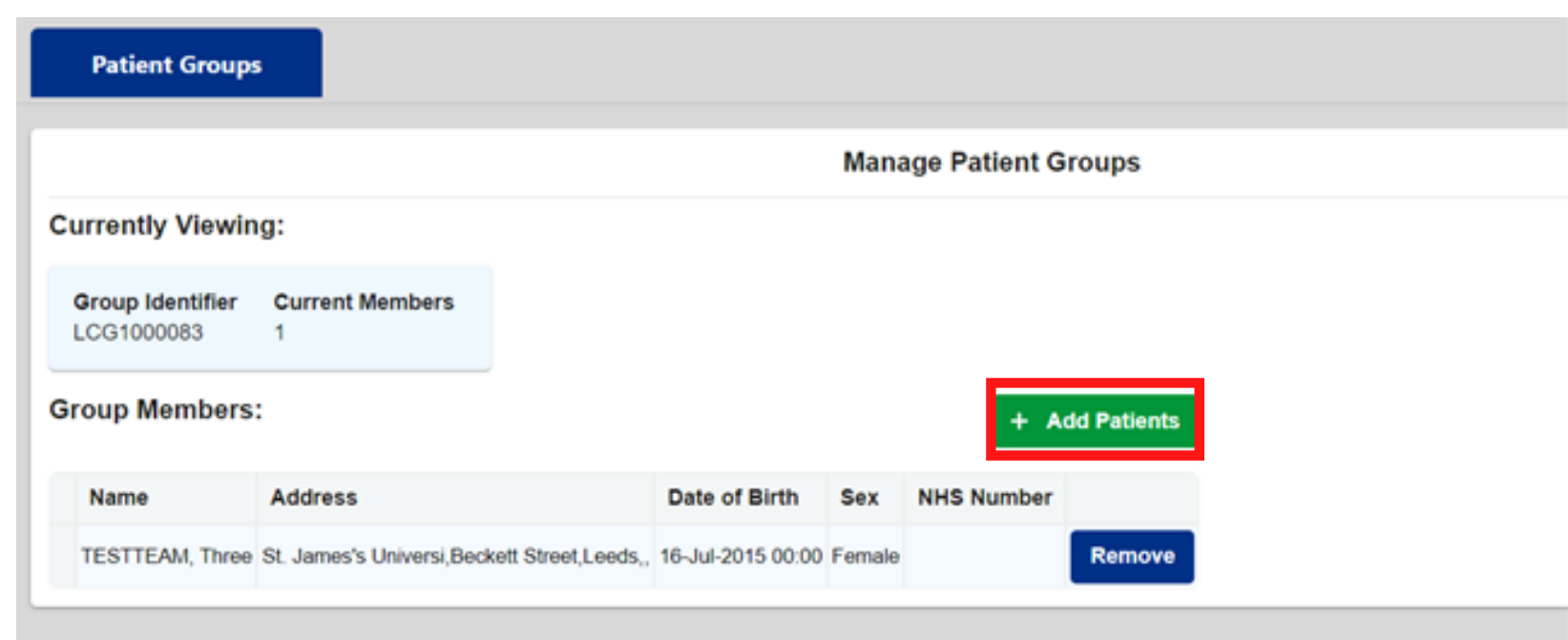**1** On the **PPM+ Homepage**, On the left hand side panel **Select Manage Patient Groups**.

2 In the **Patient Group Search** field enter the **LCG Patient Group Number**, then click on **Search.**
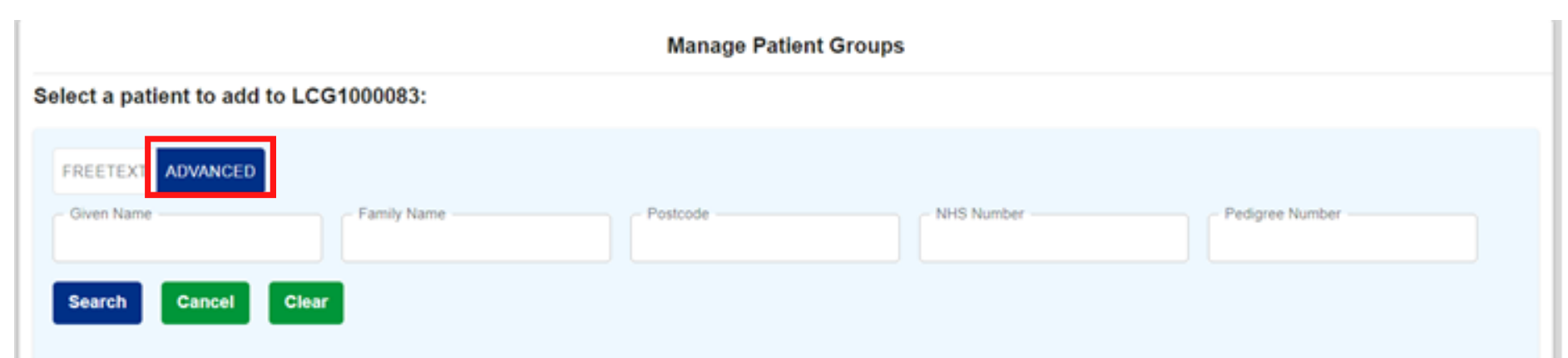
3 You will now see the **Patient Groups** form. Click on **Add Patients.**

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 LCGxxxxxxxxx. **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.

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

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

11 Click on the Advanced Tab.

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.

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**

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

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

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

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

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

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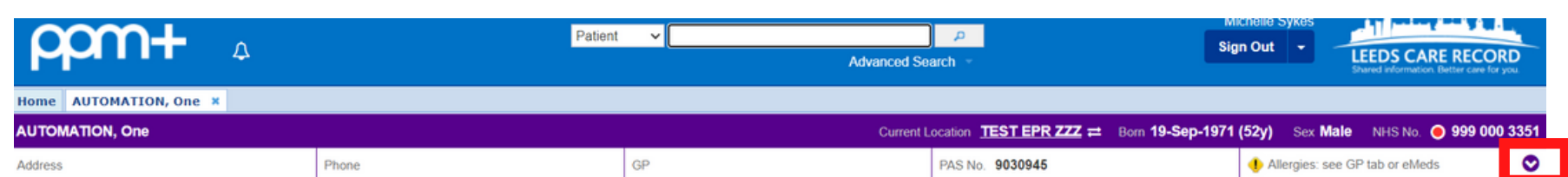
2 In the **Patient Group Demographics Banner,** Select The Patient Group LCG Number.

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

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Viewing a LCG Patient Group History

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

2 The **Patient Group History** is now Visible

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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 <u>Click Here</u> 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.**

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

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3 When the eForm opens, in the **Clinical Presentation** section use the search field to find the **Reason for Referral**.

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** or **Refuted**.

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...

Status
○ Present
○ Absent

+Add

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

Phenotype

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

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

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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.

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

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

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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**.

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.

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**.

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 and **Select Submit**

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4 The completed **Clinical Genetics Clinical Note** will be visible in the **Patient's Single Patient View**.
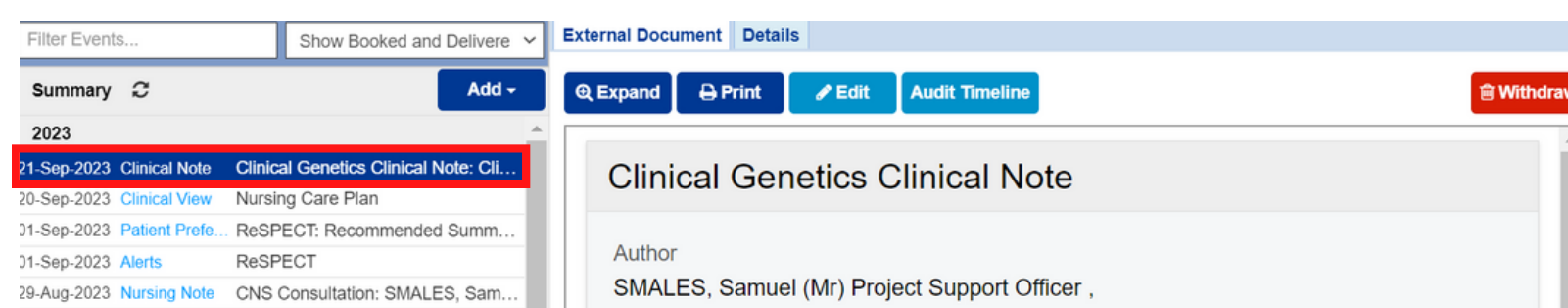
Please note, the **Clinical Genetics Clinical Note is only visible to Clinical Genetics team members.** If you want to add any information to a Clinical Note which is visible to all PPM+ users, please complete a Clinical Note - **Click Here** on how to complete a Clinical Note.

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.

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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.

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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.**

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

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

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.
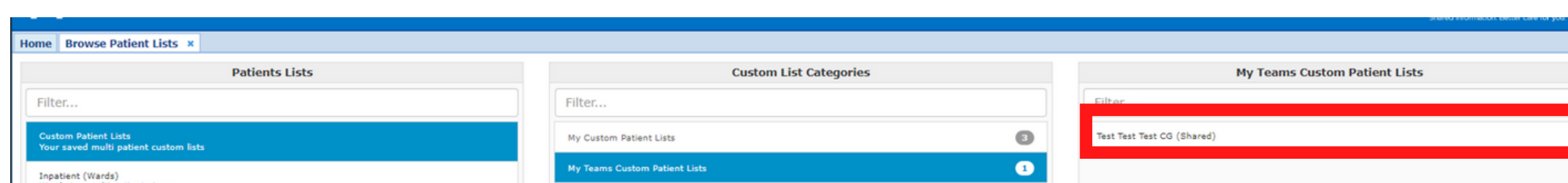
2

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.

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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**.
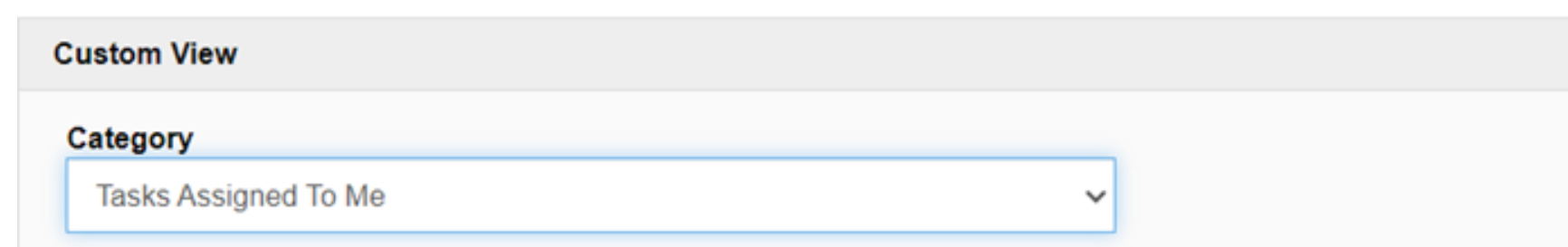
3 In the **Choose Filter Type** select Task By Name.
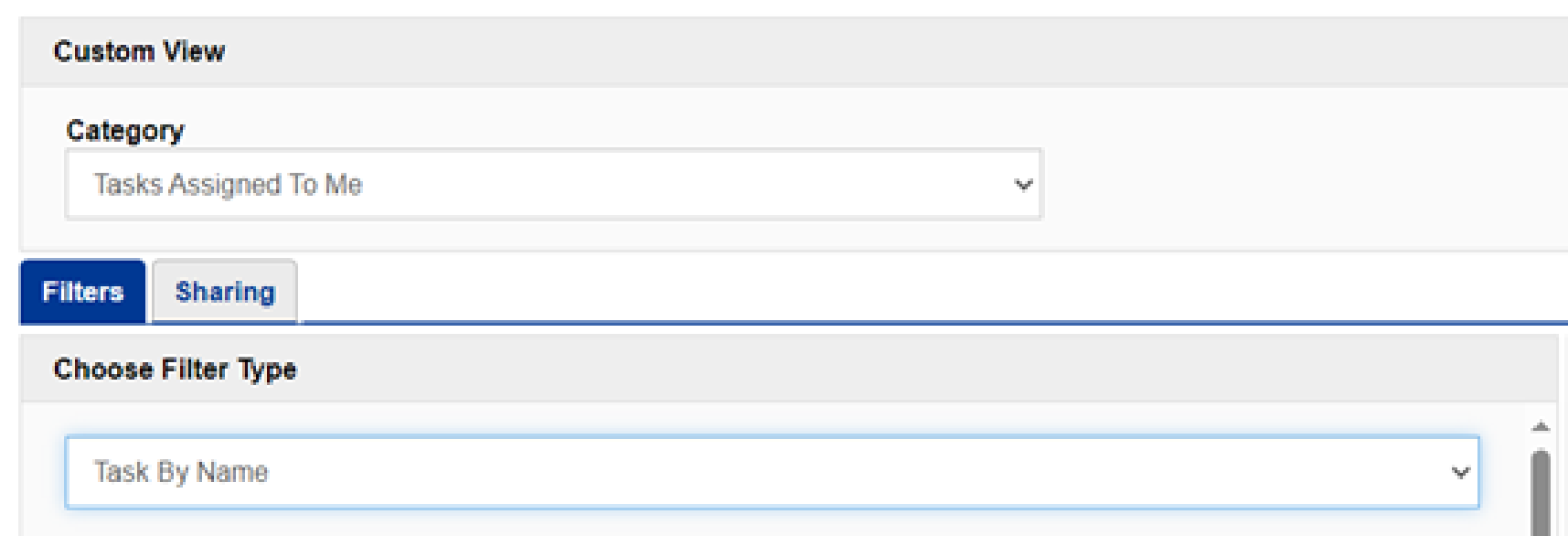
4 In the Name field give **Your list a unique name**
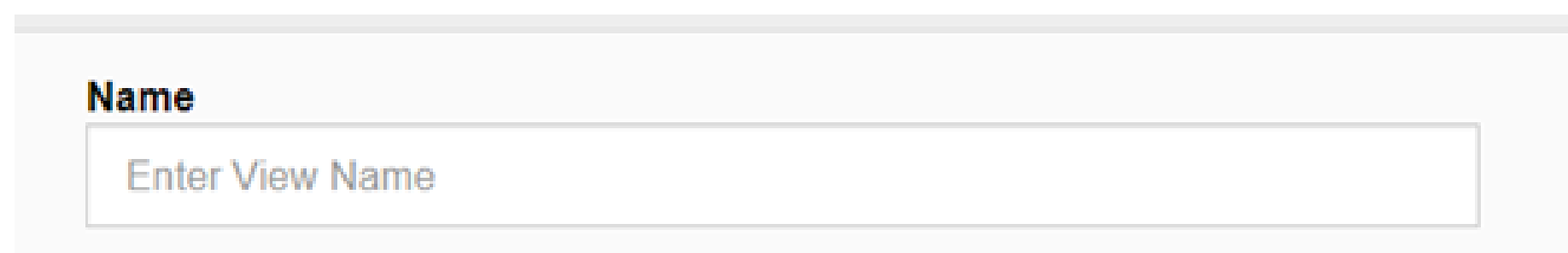
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5 **Select All Relevant Tasks** in the drop down list. You will see the selected **Tasks on the right side of the screen**.
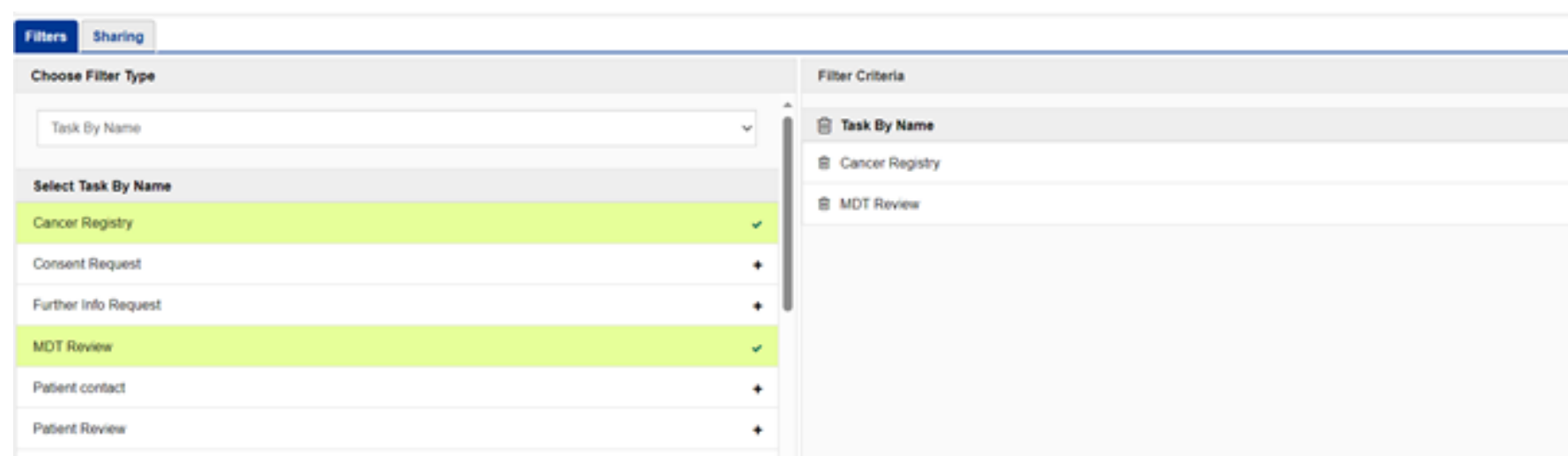
6 You can share your list if required by **Selecting the Sharing tab and searching for the person in the Search field.**
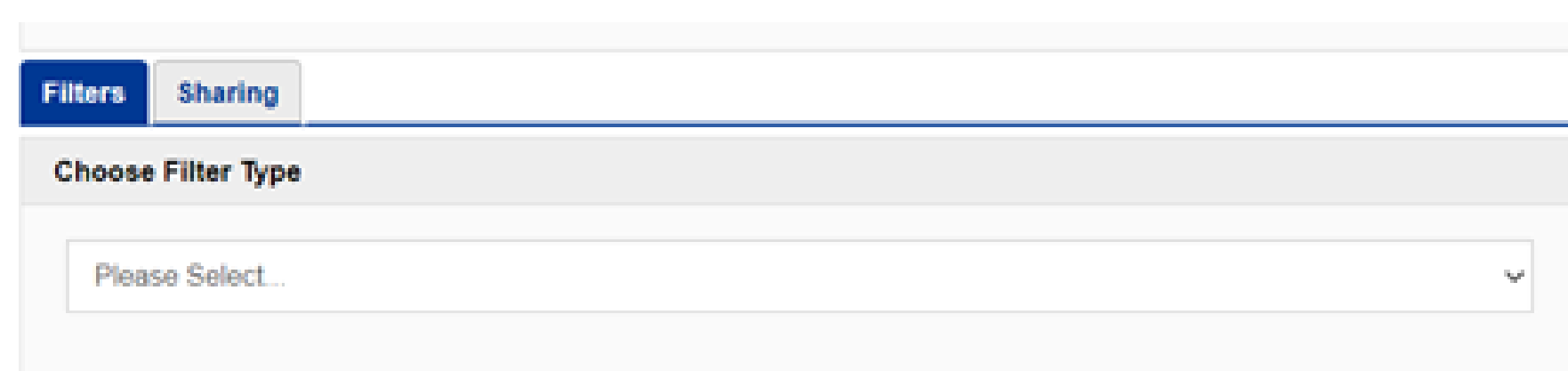
7 Now **Click Save**. Your list will now show

Save

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.

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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.
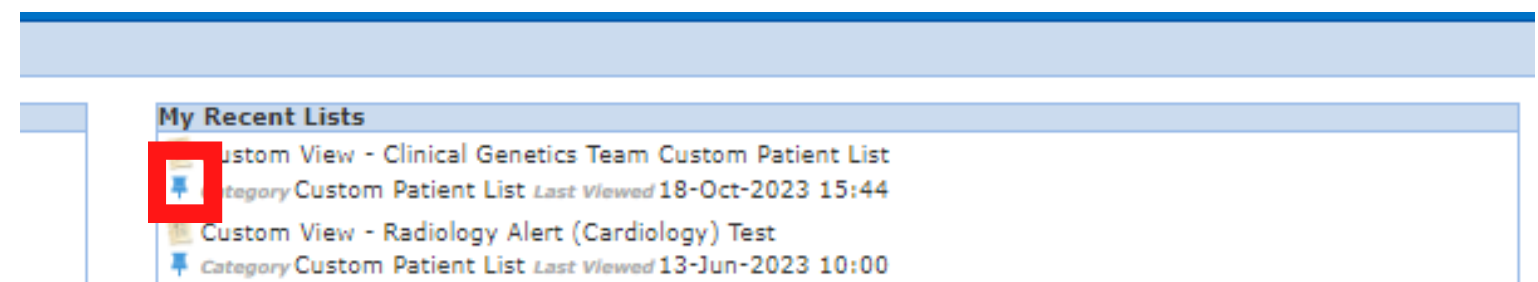
2 You can also find your list from the Home Screen **By Selecting Browse List,**
Custom Patient Lists, My Custom Patient Lists Then **Select the Required** List.
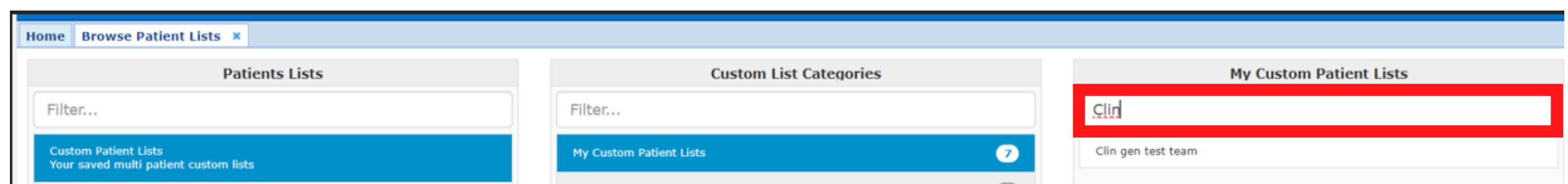
To find out more about creating, viewing and editing Custom Patient Lists by <u>Clicking Here</u>.

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

- **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. Later in this User Guide it will show the functionality of that particular column.
- **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
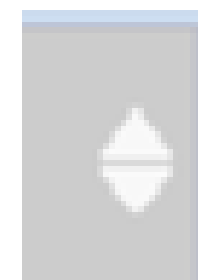
It is highly recommended to find the Patient and task you wish to view and action in the Custom Patient List and then navigate to the Patient's Single Patient View. Please follow the rest of the User Guide after this section.
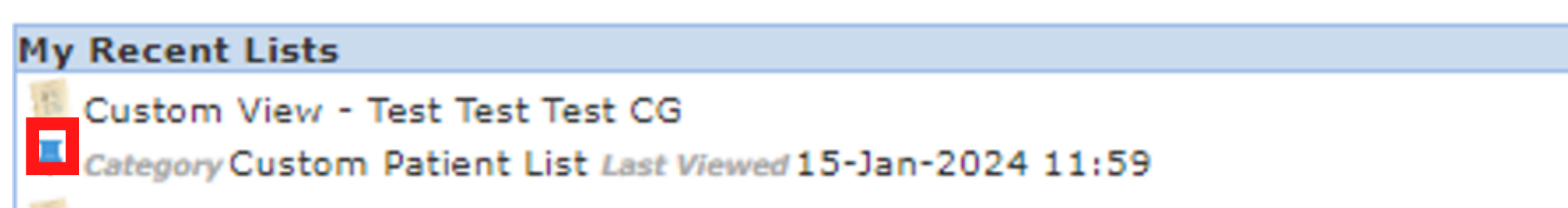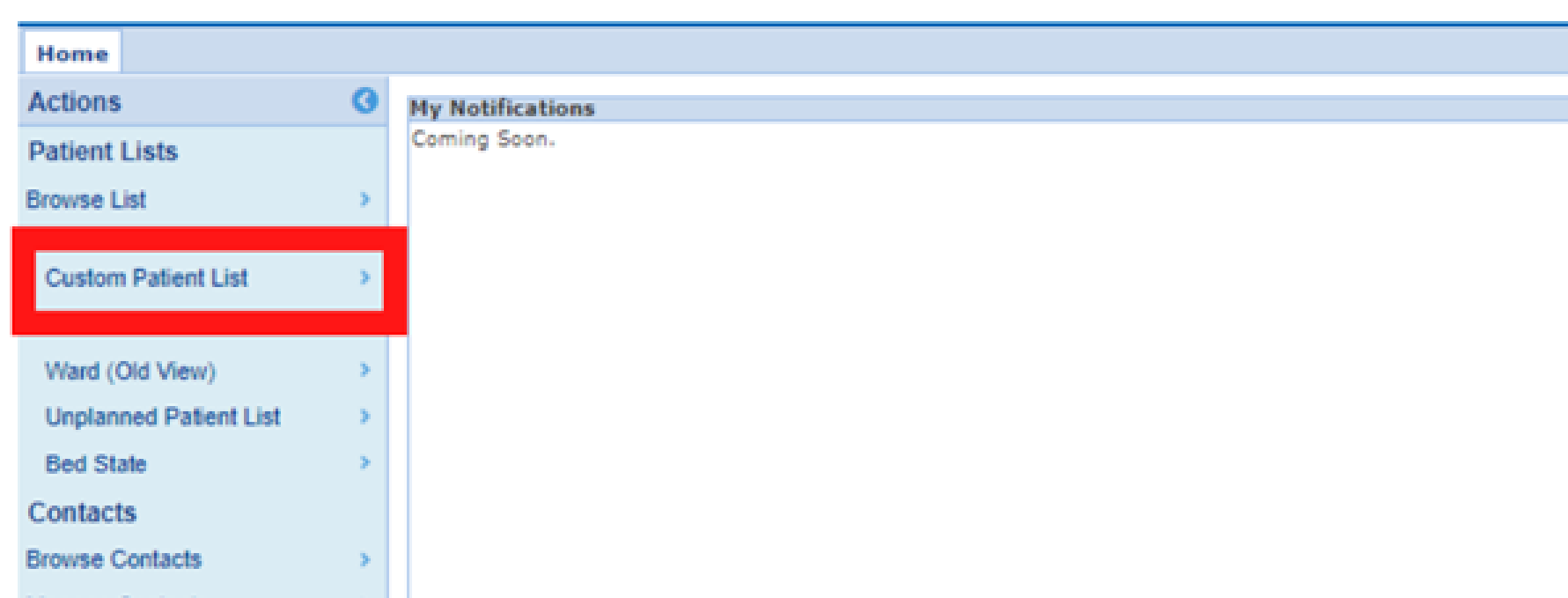
For further information please contact:
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Creating an Adhoc Task

You can **Add an Adhoc task** for a Patient by **Selecting 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.

Please note, you can only allocate a task to a member of staff who is a member of that Team and has their Team and Specialty recorded in their PPM+ Contact.

1 When in the **Add Document Screen**, type in filter section **Adhoc and then Select Create Adhoc Task.**

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

3 When the **eForm opens** in the **Team section, Click in the Select field** and **Select the required Clinical Genetics Team.**

4 To assign a task to a **specific member of that team**, in the **Assignee field**, start to type the surname of the required person. **Select the correct person**.

Please Note: You can only allocate a Task to a member of staff who is a member of the selected Clinical Genetics Team. The member of staff needs to have their Clinical Genetics Team and Speciality recorded in their PPM+ Contact.

5 In the **Task Name Section**, click within the **Select Field** and chose from one of the available tasks. For this example, we have selected Consent Request.

6 You need to select a **date and time** the **task is due** to be completed by. You can not put a **previous date and time**. Click within the **date and time fields** to edit.

7 In the **Task Details Section**, document the actions which need to be completed in order to complete the Adhoc Task

Task details

Steps to complete *

B I U ☰ ☰

Please receive consent from the patient

8 Once **finished**, Click on **Submit.**

Submit

Viewing, Completing and Editing an Adhoc Task via View Patient Tasks Dashboard

1 When you have found your **Patient of interest**, click on the **Blue square** next to their name and then click on **Single Patient View**.

2 To view the **View Patient Tasks Dashboard**, click on **View Patient Tasks** via your Patient's Single Patient View

3 The **Patient Tasks Dashboard** will then open. You will initially only be able to see the Patient's Due/Overdue Tasks.
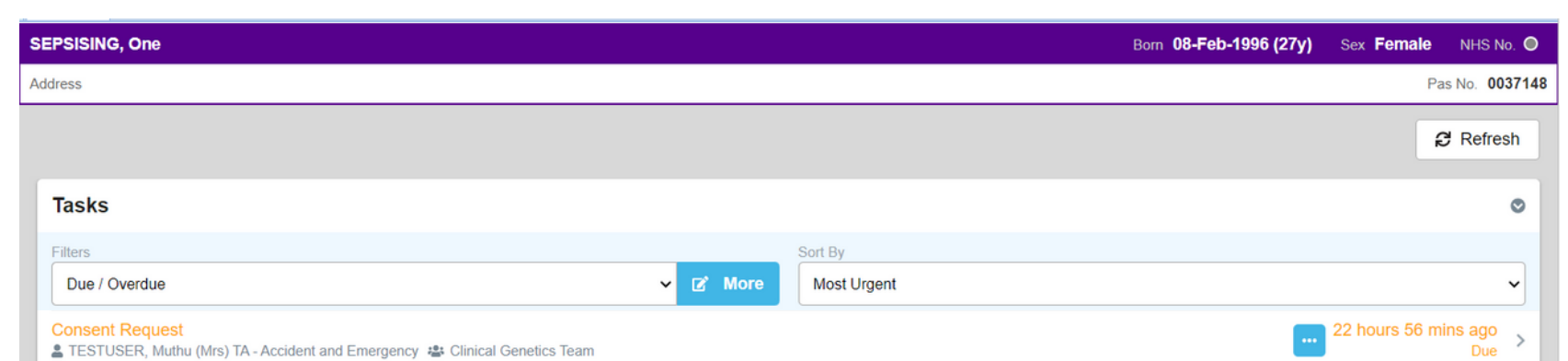
4 At the top of the **Task Dashboard**, you can filter it to **Due/Overdue tasks, My tasks, My Team Tasks or All Tasks**.
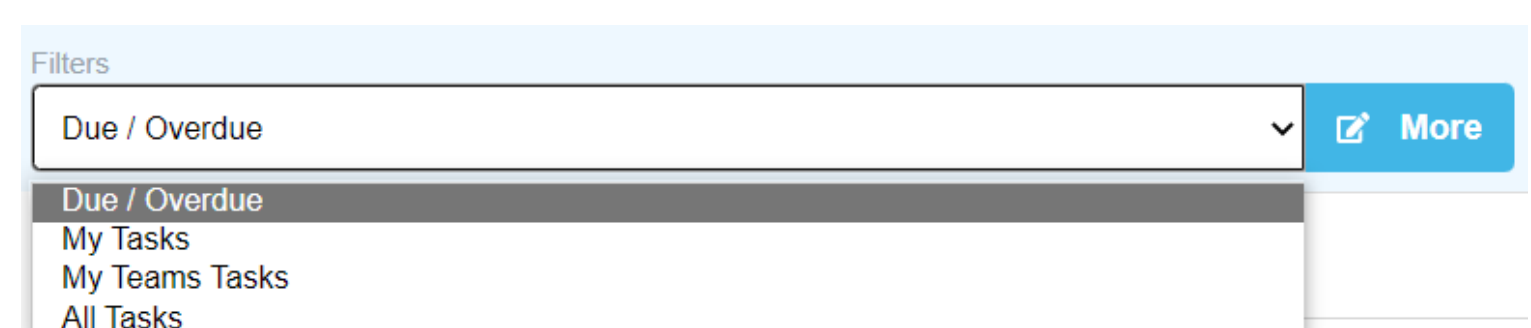
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5 At the top of the **Task Dashboard**, you can also sort the Tasks by **Most Urgent, Least Urgent, A-Z or Z-A**

If the Task is in Orange, it means it is **Due** and is **still within the 24 hours** of its due date and time. As soon it is 24 hours post its due date and time, the Task will turn Red and the Task is now **Overdue**. If the Task is in Black, it is not due yet but still can be completed.

6 To **complete the Task**, click on the **Task's name**.

7 Once you have completed all the appropriate steps detailed in the task, **Click on I have completed the steps outlined above**, Then **Click on Submit**. **You can see details of the Task at the top of the eForm.**

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8 When back on the **Patient Tasks Dashboard,** if you change the filter to **All Tasks** and then scroll down you can see your **completed task and upcoming due tasks for the Patient too**. You can view the **Timeline** for your **completed tasks.**
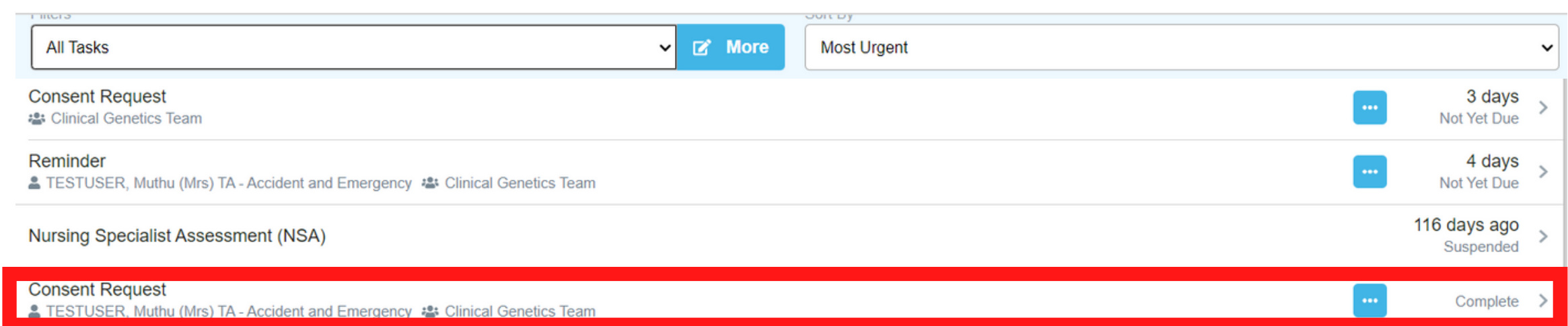
9 Clicking on the Blue square in the task's field gives options to **Edit**, **Close or View Tasks Timeline**.

Please note Close should ONLY be used if the task is no-longer required. It must NOT be used for completing the Task.
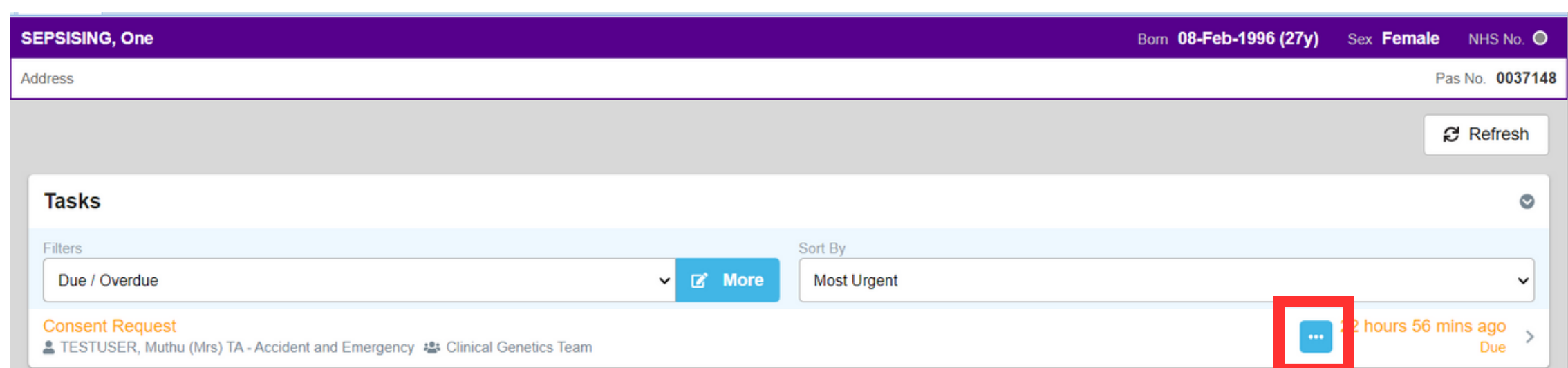
10 If you wish to Close the task, **Click on Close**. The **Close Task** window will open. **Document the reason for not completing the task.** Then click on **Submit**.
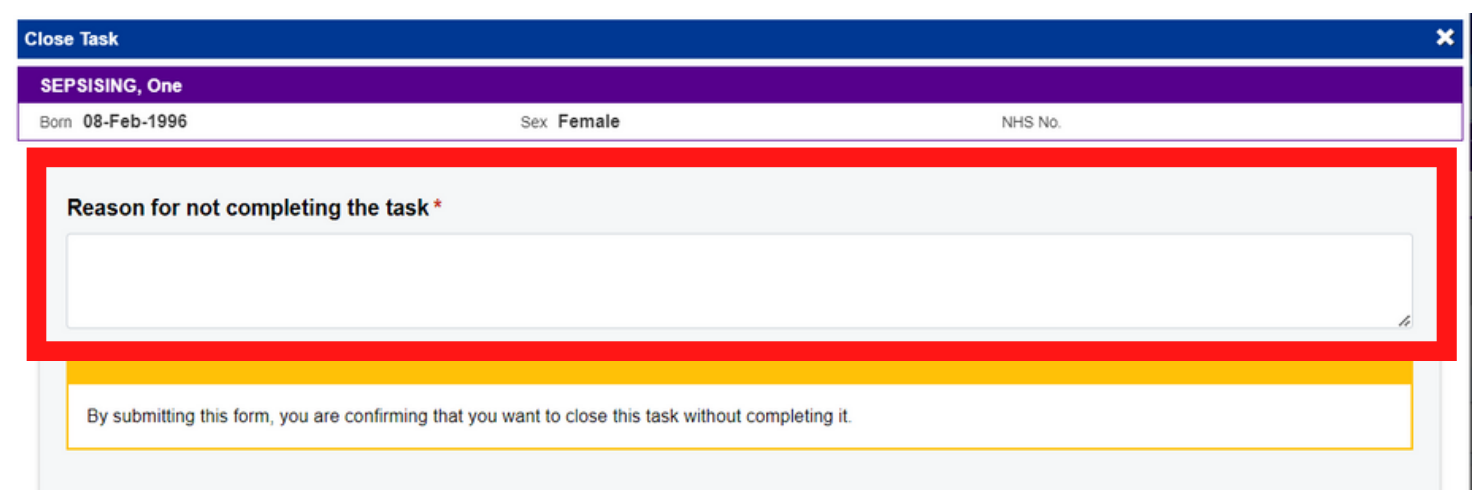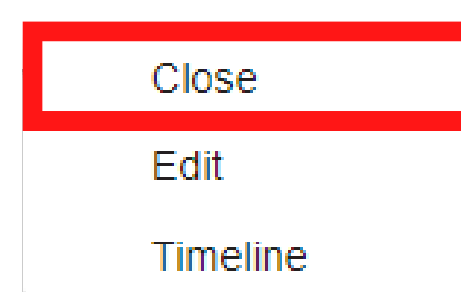
11 If you wish to reassign the task, click **Edit**. The **Edit Adhoc Task** eForm will open. Click within the **Assignee** section to change who the Task is assigned to. **Please note: You can only reassign the task to someone in the Team the task is already assigned to.**

12 You can also change the **Due Date** or **Due Time** by selecting the tick box below the options. Then changing the details in the available boxes.

13 If you make any changes via the **Edit Adhoc Task** eForm, you will need to fill out the **Edit Task Reason** at the bottom of the window before clicking **Submit**. Any items with a * will need to be filled out before proceeding and some are automatically entered and cannot be changed such as **Date of Activity**.

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

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14 In the **Task details Section** you can **add to the actions required** to complete the task if required for the new Assignee. Then, click on **Submit**.

Task details

Steps to complete *

B *I* U ≔ ≔

Please receive consent from the patient. Ring NOK

15 If you wish to view the Timeline for the task, Click on **Timeline**. The **Timeline** window will open. You can scroll through to see the complete history of that particular **Adhoc Task**.

Close

Edit

Timeline

< Tasks   Timeline
                    20 October 2023
Reassign Adhoc Task (Created)   15:32
👤 by SMALES, Samuel (Mr)
ⓘ   View
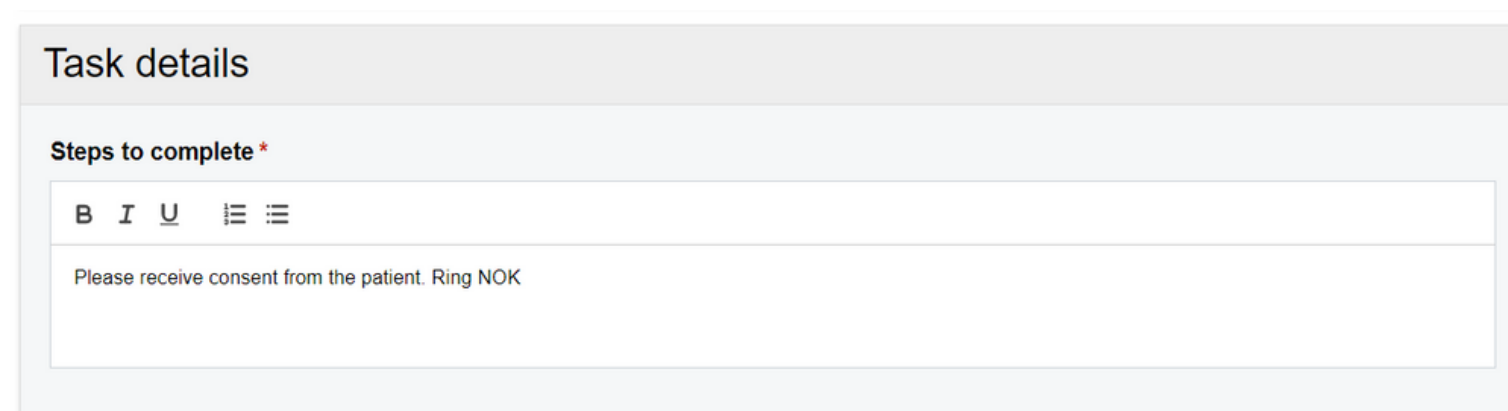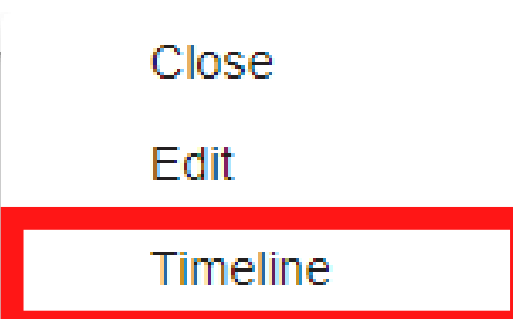   19 October 2023
                    15:55   Task Consent Request (Due)
                           👤 by PPM+ System User
                                      14:00
Task Consent Request (NotYetDue)

16 Some entries in the **Timeline** can be viewed in **more detail**. If the entry has **View** in it, you are able click on the word **View**. **The further information regarding that entry will displayed on the right hand side**.

Reassign Adhoc Task (Created)   15:32
👤 by SMALES, Samuel (Mr)
ⓘ   View

            19 October 2023
    15:55   Task Consent Request (Due)
           👤 by PPM+ System User

            14:00
Task Consent Request (NotYetDue)

Reassign Adhoc Task (Created) as it was on 20 October 2023 : 15:32

Create task

Team
Clinical Genetics Team

Assignee
TESTUSER, Muthu (Mrs) TA - Accident and Emergency

Task name
Consent Request

Due Date
19-Oct-2023

Due Time
15:55

17 Click on **Tasks** to **return** to the **Patient's Tasks Dashboard.**
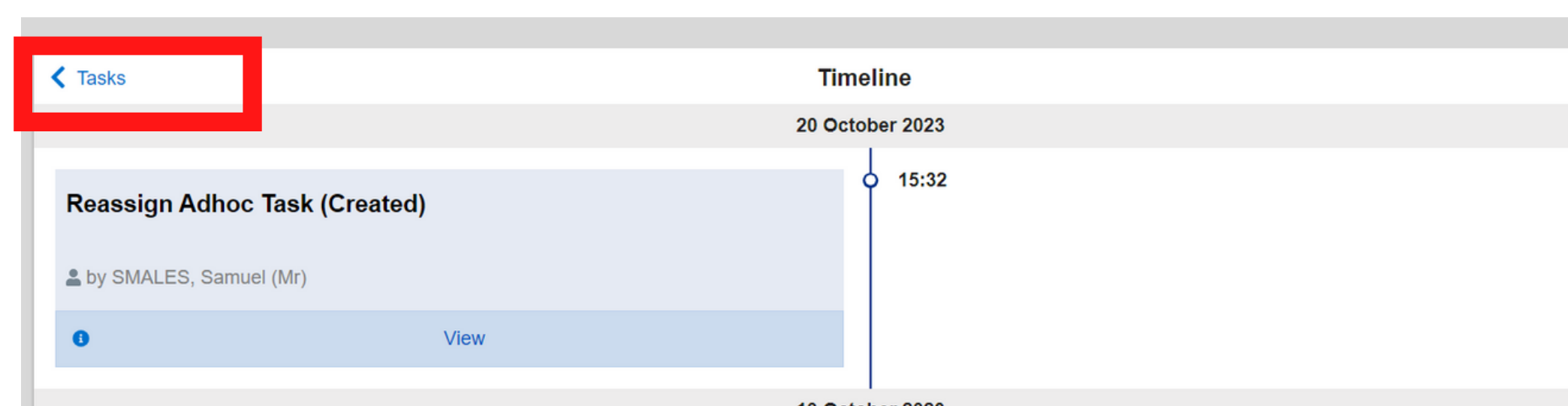
< Tasks   Timeline
                    20 October 2023
Reassign Adhoc Task (Created)   15:32
👤 by SMALES, Samuel (Mr)
ⓘ   View
                    19 October 2023

For further information please contact:
✉ leedsth-tr.ImplementationTeam@nhs.net or   📞 0113 206 0599

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. However, the options you can chose from for the **Adhoc Task,** are not as advanced in the **Custom patient List**.

1 In the **Clinical Genetics Custom Patient List**, **Click on the Task Column Cell** for your Patient. You will now see the **Task List for your patient. Select the Task** you want to complete **(in this example, it is MDT Review)** and **Click on it**.

2 Fill out the Relevant Information and **Click Submit.**

3 You can also Close the **Adhoc Task** by Clicking on the Blue Square next to the Adhoc Tasks name and then Click on Close.

Please note Close should ONLY be used if the task is no-longer required. It must NOT be used for completing the Task.
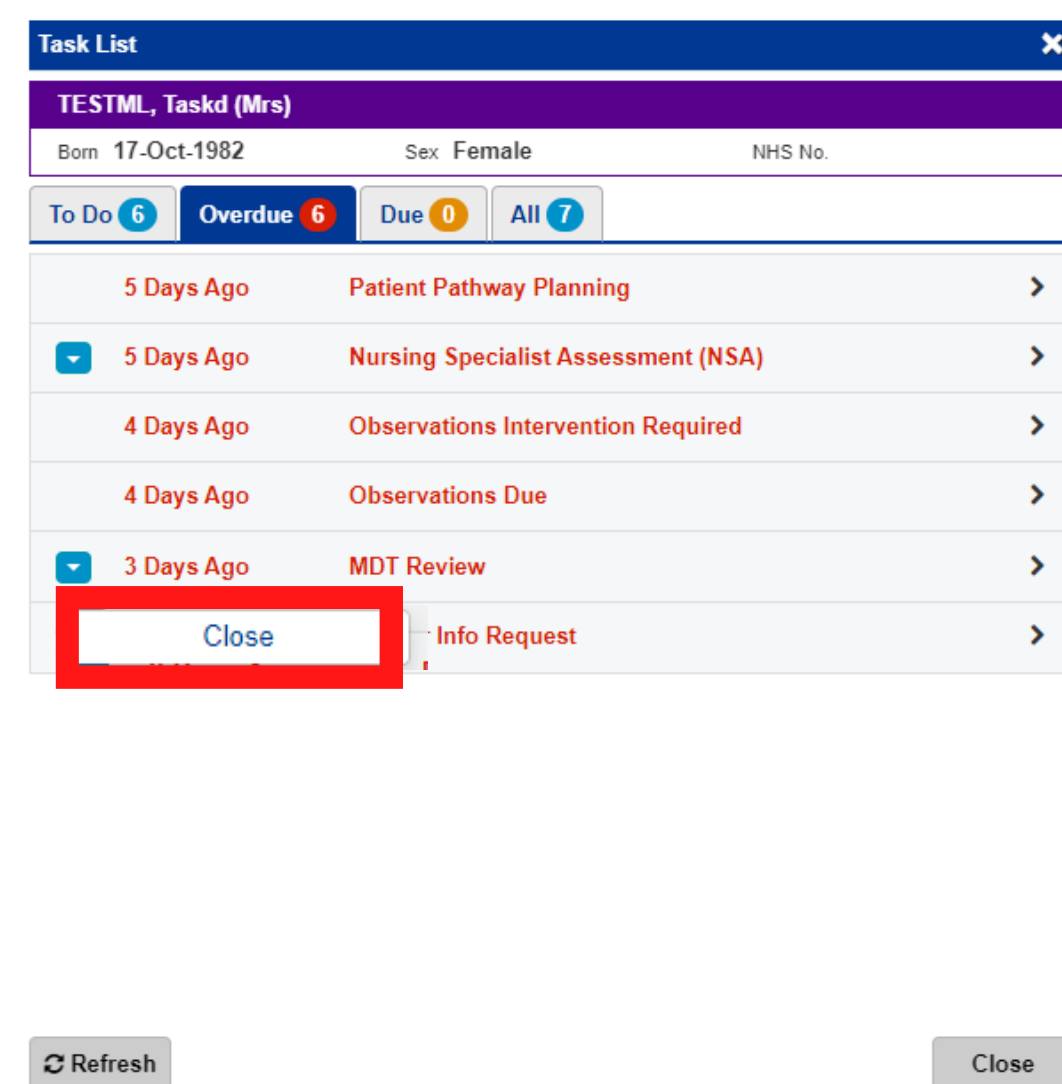
4 The **Close Task** window will open. Document the reason for not completing the task. Then, click on **Submit**.
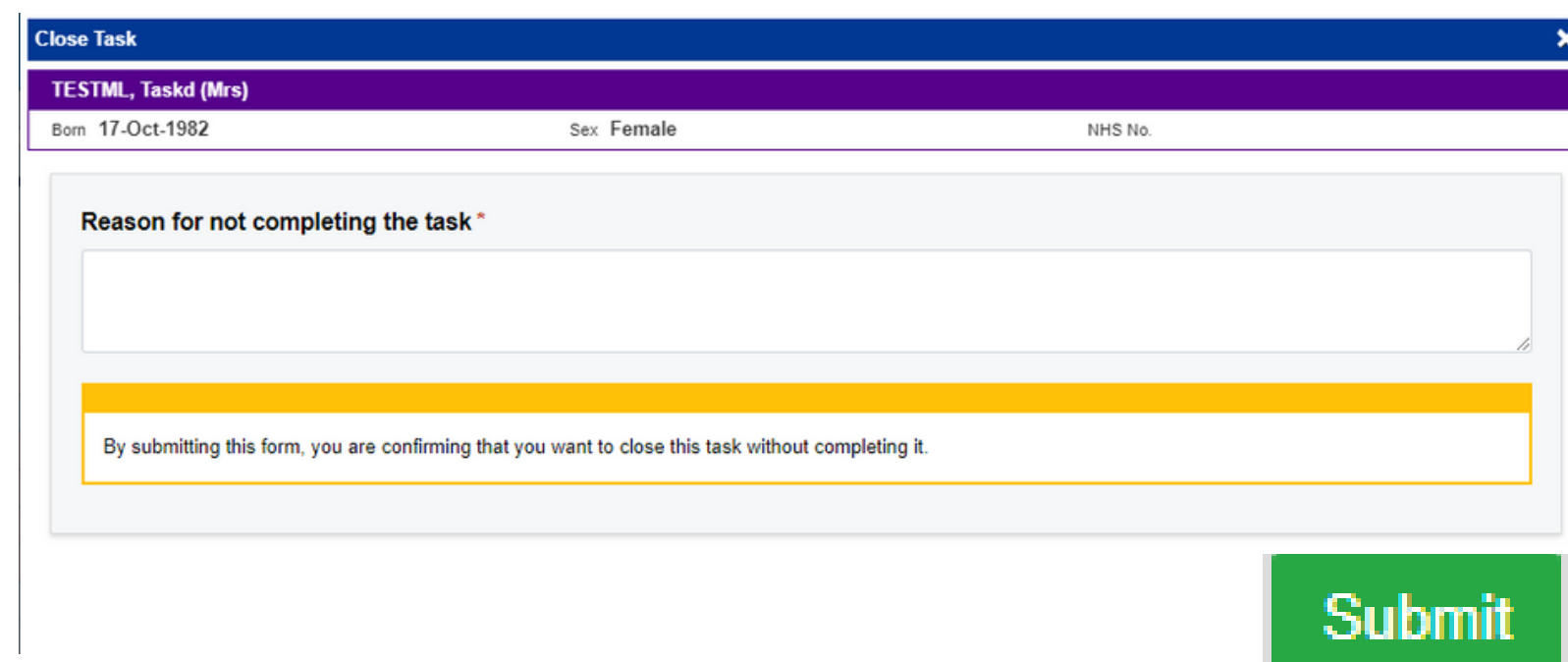
5 At the top of the **Task List** view, you can click between views of the **outstanding Tasks** for your **Patient** by clicking on the **tabs**.

For further information please contact:
leedsth-tr.ImplementationTeam@nhs.net or 0113 206 0599

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.

For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net or   📞 0113 206 0599

Useful contacts

Implementation Team

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

📞 Ext: 60599

✉️ leedsth-tr.ImplementationTeam@nhs.net

Informatics Service Desk

Please contact the **Informatics 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

If you would like to make a **Request For Work to PPM+**, **Click Here** to be taken to the required page on the Trust's intranet

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

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

For further information please contact:
✉️ **leedsth-tr.ImplementationTeam@nhs.net or** 📞 **0113 206 0599**