



The Leeds
Teaching Hospitals
NHS Trust

ppm+

Clinical Genetics

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES

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For further information please contact:

 leadsth-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 [Click Here](#) to view the User Guide.

For further information please contact:

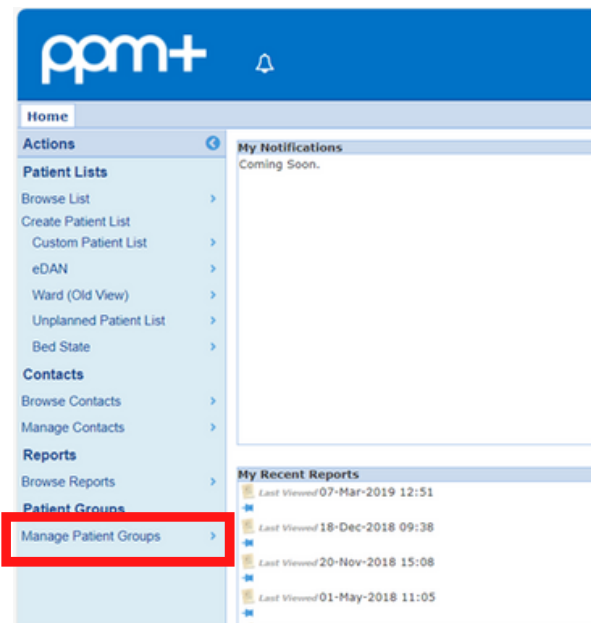
 leedsth-tr.ImplementationTeam@nhs.net or  0113 206 0599

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.

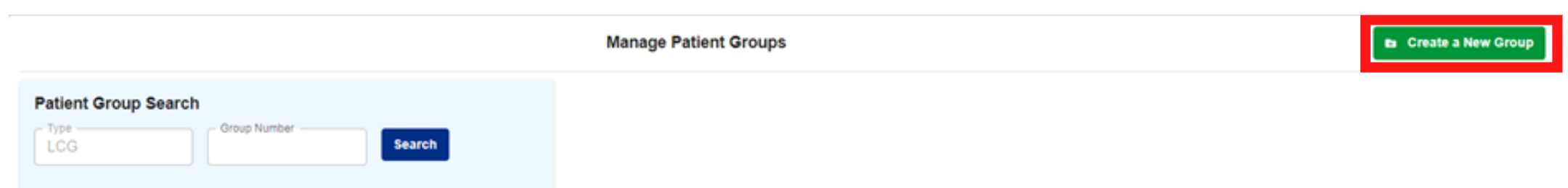
1

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



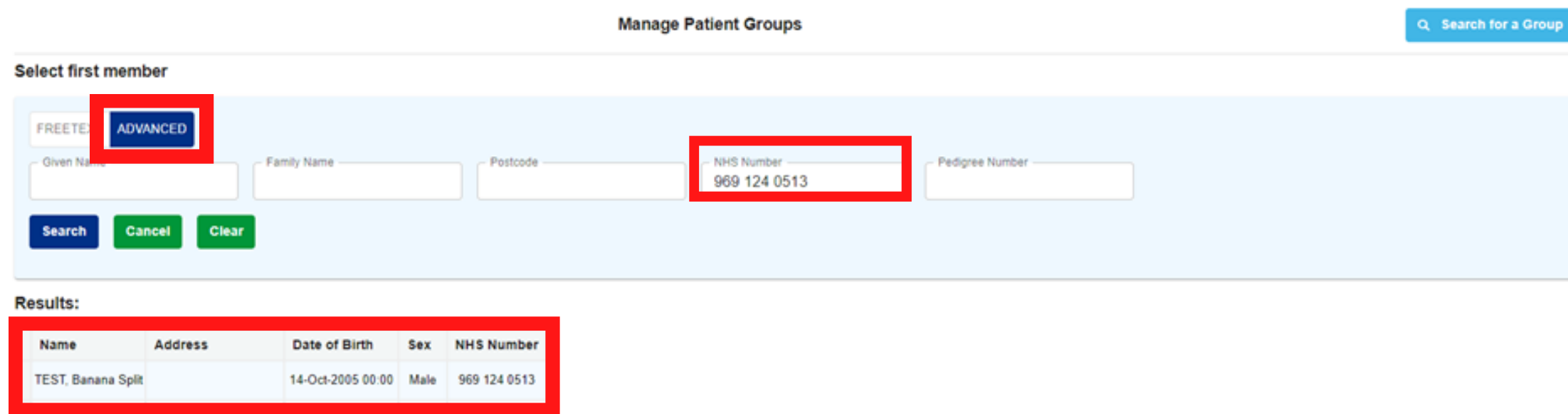
2

Select **Create a New Group**.



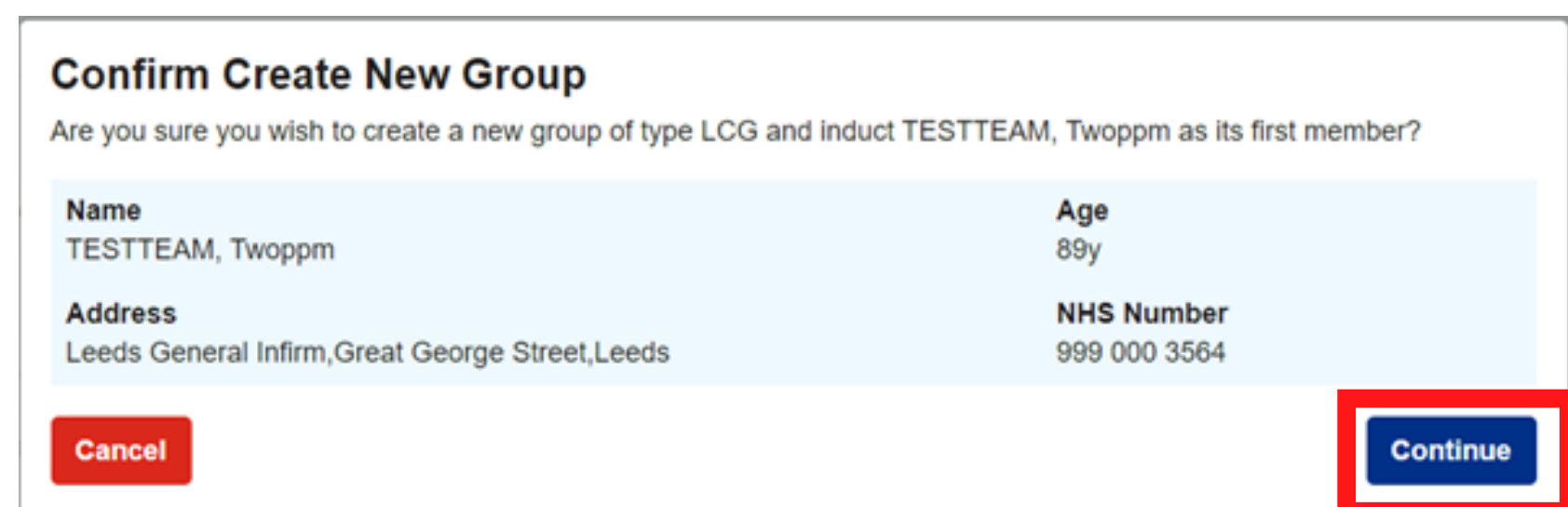
3

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



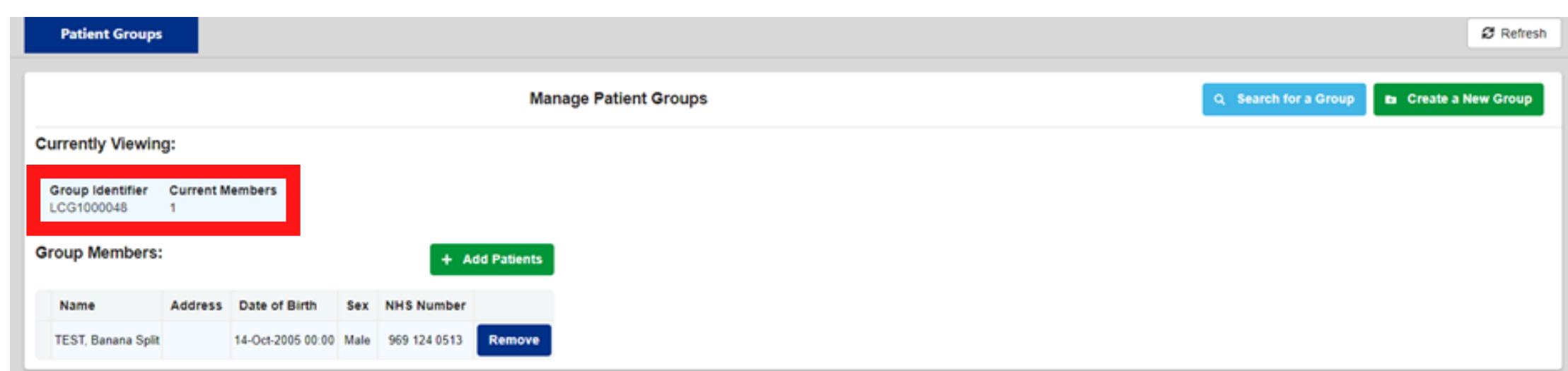
4

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**.



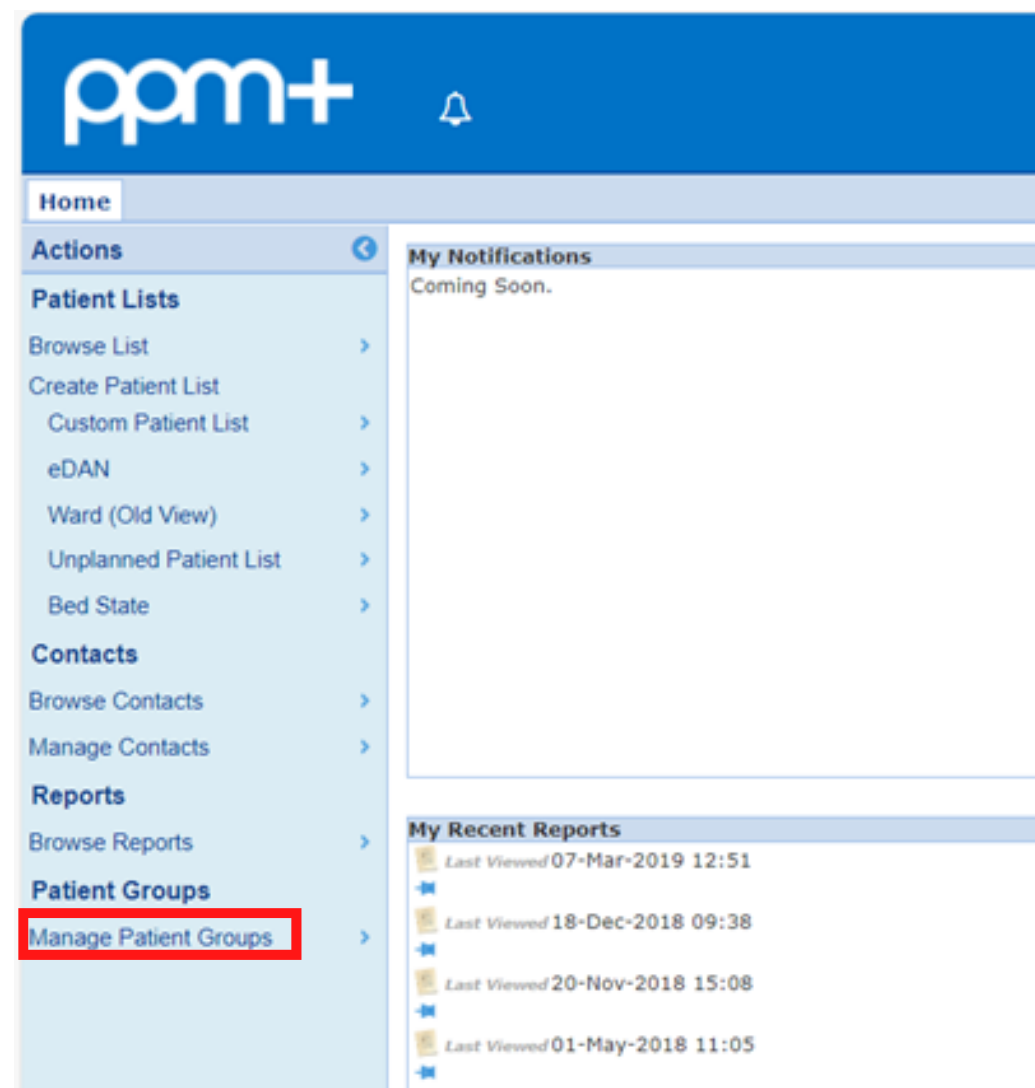
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Adding an Additional Patient to a Leeds Clinical Genetics (LCG) Patient Group

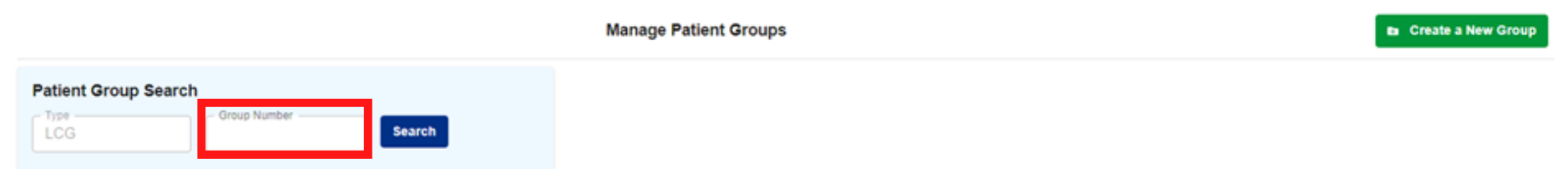
1

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



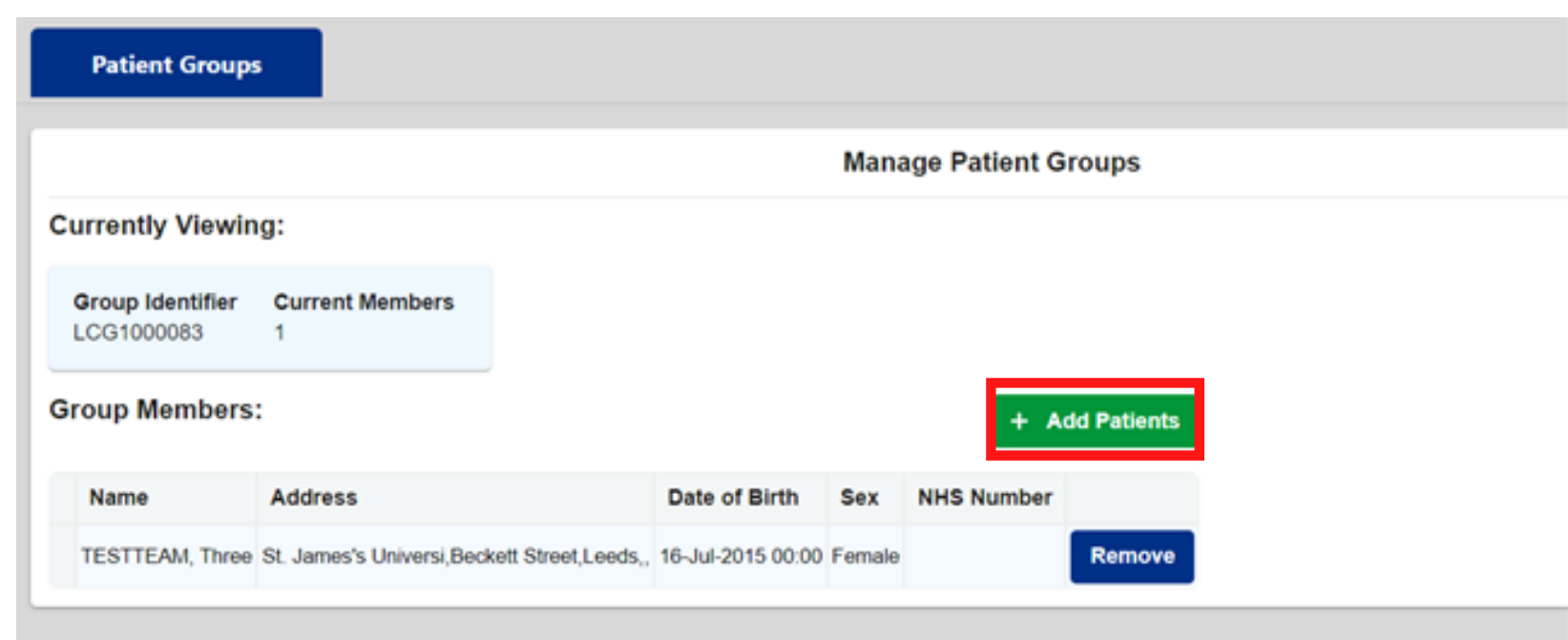
2

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



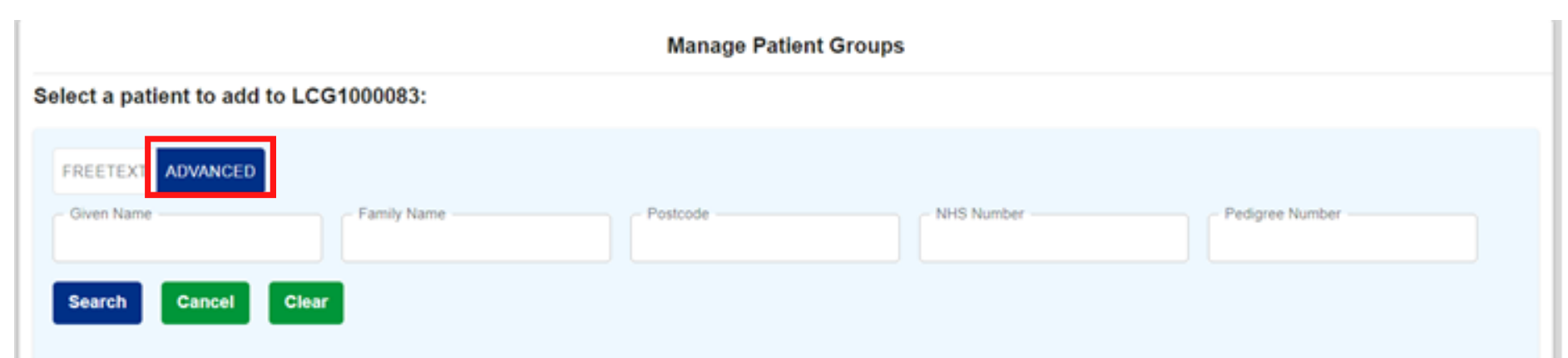
3

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



4

Click on the **Advance Tab**.



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☎ 0113 206 0599

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

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

Results:

Name	Address	Date of Birth	Gender	NHS Number
TESTC, Mica	Leeds Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdffffffe	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 LCGxxxxxxx. If correct, select **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 Sfsddddddde, Richmond Hill Abcde, LS9 8NP Sdffffffe NHS Number: 959 361 7434

Cancel Continue

7

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

Patient Groups x

Manage Patient Groups

Currently Viewing:

Group Identifier: LCG1000084 Current Members: 2

Group Members:

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

+ 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.

ppm+ Patient [dropdown] Advanced Search

Home AUTOMATION, One x

AUTOMATION, One

Address Phone GP

Current Location TEST EPR ZZZ (Born 19-Sep-1971 (52y) Sex Male NHS No 999 000 3351 PAS No 9030945 Allergies: see GP tab or eMeds

For further information please contact:

leedsth-tr.ImplementationTeam@nhs.net or

0113 206 0599

9

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

Phone
Other Phone Numbers

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

PAS No: 9030945
Allergies: see GP tab or eMeds

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:

[+ Add Patients](#)

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

[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 Sf5dddddde, Richmond Hill Abcde,LS9 8NP Sdttttte	NHS Number	959 361 7434

[Cancel](#) [Continue](#)

1 of 1

For further information please contact:

leedsth-tr.ImplementationTeam@nhs.net or [0113 206 0599](tel:0113 206 0599)

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

For further information please contact:

leedsth-tr.ImplementationTeam@nhs.net or [0113 206 0599](tel:01132060599)

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

1

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

Address	Phone	GP	PAS No. 9037263
Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS...			
Usual Address Leeds Sfsdtdtdtdde Richmond Hill Abcde LS9 8NP Sdfttdtdde Skipton Dstfttdtdde	Other Phone Numbers	GP Details View full GP Details	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: [+ Add Patients](#)

Name	Address	Date of Birth	Sex	NHS Number	
TESTC, Mica	Leeds Sfsdtdtdtdde, Richmond Hill Abcde, LS9 8NP Sdfttdtdde, Skipton Dstfttdtdde	21-Aug-2019 00:00	Female	959 361 7434	Remove
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?

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

Cancel

Continue

For further information please contact:

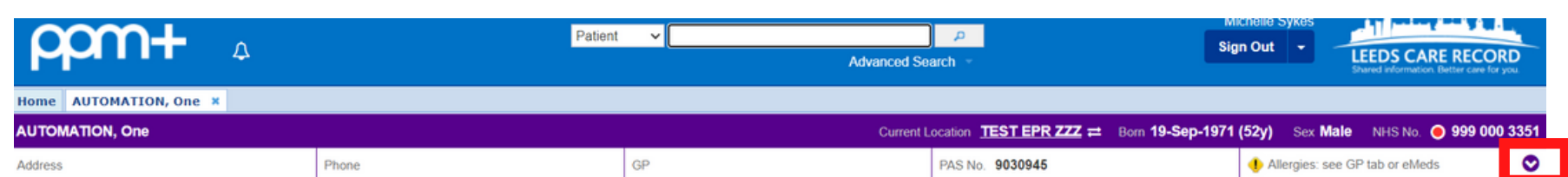
✉ leedsth-tr.ImplementationTeam@nhs.net or ☎ 0113 206 0599

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 x

[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

For further information please contact:

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Viewing a LCG Patient Group History

1

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

The screenshot shows the 'Patient Group History' tab selected in the patient's profile. The 'View Patient Group History' button is highlighted in yellow.

Address	Phone	GP	PAS No.	Allergies
LS9 7TF				see GP tab or eMeds
Usual Address LS9 7TF	Other Phone Numbers	GP Details View full GP Details	Other Identifiers Patient Groups LCG 1000081 View Patient Group History	

2

The **Patient Group History** is now Visible

The screenshot shows the 'Patient Group History' table with the following data:

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		

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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 [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' interface. At the top, there is a search bar containing 'Clinical genetics', which is highlighted with a red box. Below the search bar are two dropdown menus: 'Show All' and 'Sort By Favourites'. Underneath, there is a section titled 'In Progress (Drafts)' with the text 'There are no draft documents'. Below that is the 'Add New Document' section, which contains two rows of document options. The first row is 'Clinical Genetic Disease' with a star icon and the text 'Histocompatibility And Immunogenetics'. The second row is 'Clinical Genetics Clinical Note' with a star icon and the text 'Clinical Note'. At the bottom left of the interface 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 previous one, but with a red box highlighting the star icon next to the 'Clinical Genetic Disease' document option in the 'Add New Document' section.

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3

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

Clinical Genetic Disease

TEST, Alpha (Dx)

Born: 01-Oct-1980 Sex: Female NHS No.

Submitted forms will only be visible to members of the Clinical Genetics service

Clinical Presentation

Reason for Referral

Search...

+ 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.

Clinical Genetic Diagnosis

Disease

Search...

Date

dd/mm/yyyy

Status

Provisional

Confirmed

Refuted

6

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

Clinical Genetic Diagnosis

Disease

ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1

Phenotype MIM number

Date

dd/mm/yyyy

Status

Provisional

Confirmed

Refuted

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 0113 206 0599

7

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

Disease

ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1

Phenotype MIM number

Date

22/10/2023

22-Oct-2023

Provisional

Confirmed

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.

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.

+ Add

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☎ 0113 206 0599

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

3-METHYLCROTONYL-CoA CARBOXYLASE 2 DEFICIENCY, MCC2D

Status

Present

Absent

+ Add

13

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

+ Add

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☎ 0113 206 0599

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**.

Hospital/ICR		
Actions <ul style="list-style-type: none"> Clinical Views 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+) 		
Filter Events...	Show Booked and Delivered	
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,

For further information please contact:

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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.

Hospital/ICR

Actions

Filter Events... Show Booked and Delivered

Clinical Views

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,

2

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

Expand Print Edit Audit Timeline Withdraw

Submitted forms will only be visible to members of the Clinical Genetics service

Clinical Presentation

Reason for Referral

Clinical Genetic Diagnosis

Disease

ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1

Date

23-Oct-2023

Status

Confirmed

3

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

Expand Print Edit Audit Timeline Withdraw

Submitted forms will only be visible to members of the Clinical Genetics service

Clinical Presentation

Reason for Referral

Clinical Genetic Diagnosis

Disease

ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1

Date

23-Oct-2023

Status

Confirmed

For further information please contact:

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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**.

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 is a blue header 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 hyphen. The 'Clinical Genetic Diagnosis' section displays the following information: Disease: ARRHYTHMOGENIC RIGHT VENTRICULAR DYSPLASIA, FAMILIAL, 1; ARVD1; Date: 23-Oct-2023; 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?' and 'If yes, please enter a reason why this document is being withdrawn.' The dialog box has a text input field with the text 'tes' and buttons for 'Cancel' and 'Withdraw'.

For further information please contact:

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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 Delivered

Clinical Views

View Patient Details

View Audit Log

Clinical Record Types

TESTTEAM, Three (Mrs)

All

Alerts (4)

Summary Add

2023

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

06-Jul-2023 Patient Prefe... ReSPECT P Clinical Note

28-Mar-2023 Summary Clinical Note Attachment

28-Mar-2023 Pathway eDAN - 06-C Dictation (EPRO)

Manage Custom List

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 and **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

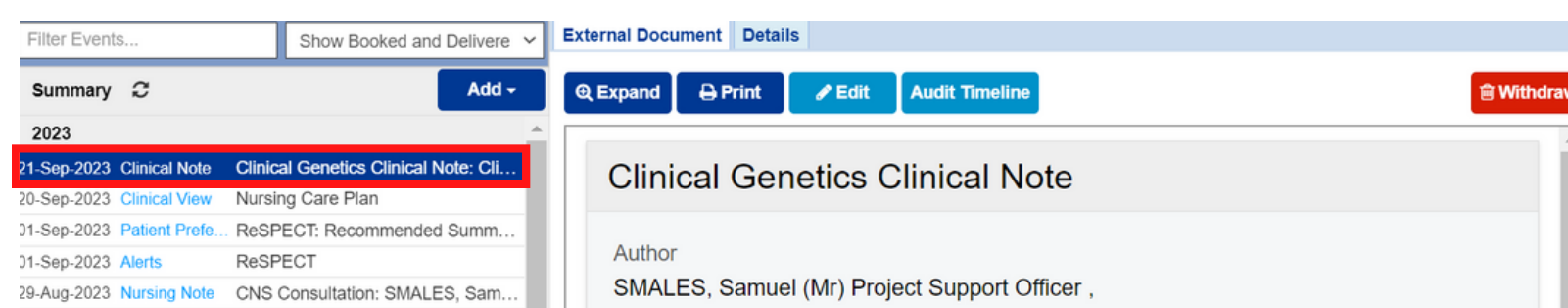
Discard Submit

For further information please contact:

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

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.

For further information please contact:

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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 patient TESTML, Shiree (Ms). The search bar contains 'Genetics'. The left-hand menu is expanded to show 'Clinical Views'. The main content area displays a list of documents for 2023, with '03-Aug-2023 Appointment Clinical Genetics Historic Information' highlighted.

2

Select the document you want to view.

The screenshot shows the details of the 'Clinical Genetics Historic Information' document. The document includes 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		
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, fimbis quis tortor. Morbi at ex interdum, congue massa eu, mollis mi. Fusce sit amet sem est.		
Date	Type	Indication
26/08/2014	Clinic, New	Breast Cancer
Reason for referral	Referred by	Seen by
New Test Reason	HorgnaK SagarP	SMI REB GT RFM
Counselled		
Dept Cancelled		
Additional Notes		
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. Donec varius vitae diam ac ornare. In non condimentum lac, a tincidunt enim. Ballanteus viverra semper eleifend. Quisquam tristique faucibus himla nisi conata. Mauris a dolor erat.		

For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net or

☎ 0113 206 0599

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+ interface for a patient named TESTTEAM, Twoppm. The left-hand navigation menu is open, and the 'WINDIP Scanned Notes Clinical Genetics' option is highlighted with a red rectangular box. The main content area displays 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'. The top navigation bar includes 'Home', 'TESTTEAM, Twoppm', and patient details like 'Address St. James's Universi, Beckett Street, Leeds, LS9 ...' and 'Phone (Home) 0113 525 5558'.

2

Select the Document you wish to view.

This screenshot shows the PPM+ interface with a scanned document selected. The document content is visible in the main area, showing the handwritten text 'ANG' and a large, stylized signature. The left-hand navigation menu is still open, and the 'WINDIP Scanned Notes Clinical Genetics' option is highlighted with a red box. The top navigation bar shows 'Hospital/ICR', 'General Practice', and 'Hospice' tabs.

For further information please contact:

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

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**.

The screenshot shows a search interface. At the top, there is a header 'Search Contact'. Below it is a text input field labeled 'Name / National Code' containing the text 'Clinical Genetics PPA Cancer'. A blue 'Search' button is positioned below the input field. Below the search area is a table with columns: Action, Name, Job Title, Type, Specialty, Code, and Address. The first row of the table is highlighted with a blue background and contains the following data: a blue arrow icon, 'Clinical Genetics PPA - Cancer', an empty field, 'Team', 'Clinical Genetics', an empty field, and 'Department of Clinical Genetics'.

3

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

This is a zoomed-in view of the table from the previous screenshot. The 'Action' column for the first row contains a blue arrow icon, and the text 'View Team' is highlighted with a red rectangular box.

4

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

The screenshot shows a 'Team Details' panel on the left with a 'Membership' tab selected and highlighted with a red box. To the right is a table titled 'Team Membership' with columns: Contact Name, From, Until, and Core Member?. The table contains the following data:

Contact Name	From	Until	Core Member?
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
SMALES, Samuel (Mr) : Beckett Wing, St James's University Hospital (Admin)	18-Jun-2023		Core

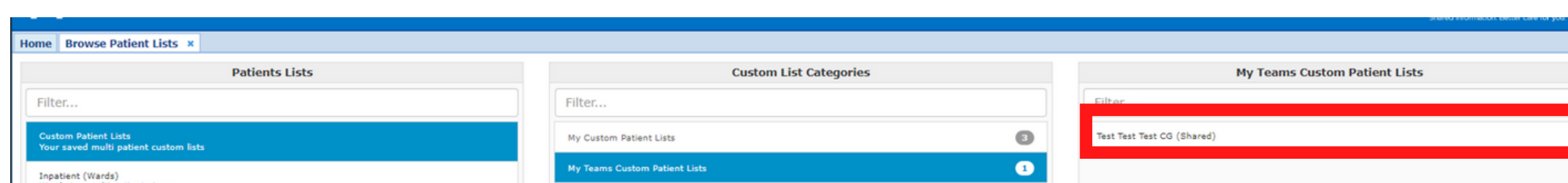
For further information please contact:

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

How to find a Teams Custom list

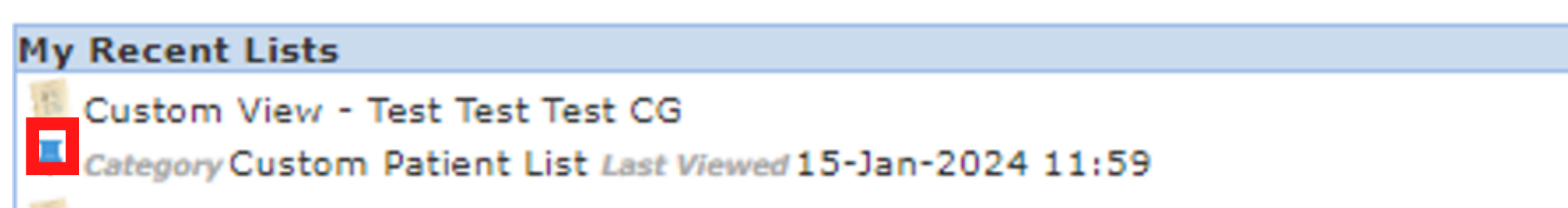
1

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.



For further information please contact:

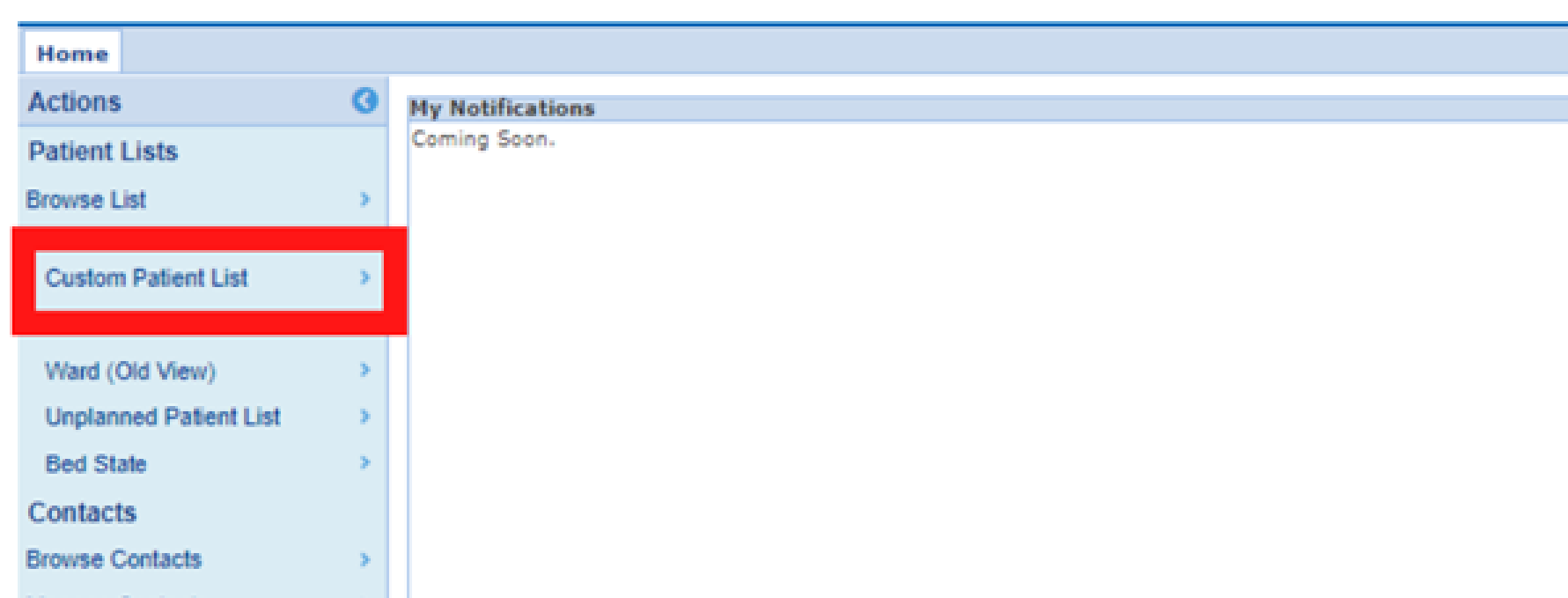
✉ leedsth-tr.ImplementationTeam@nhs.net or ☎ 0113 206 0599

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.

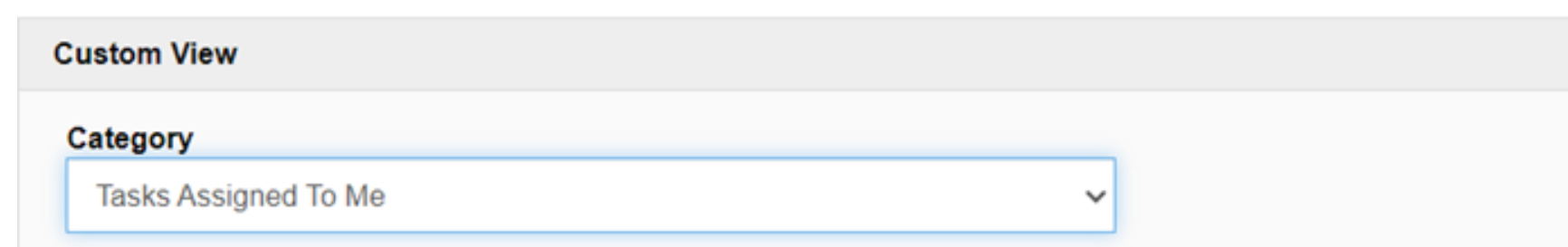
1

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



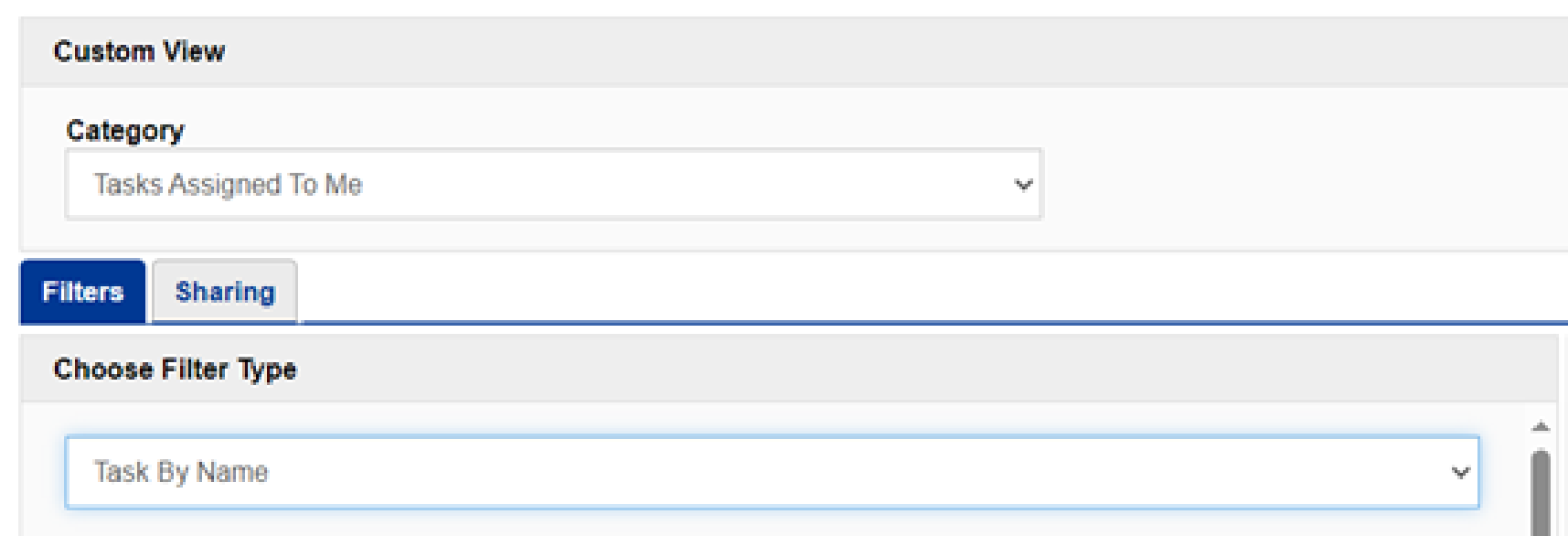
2

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



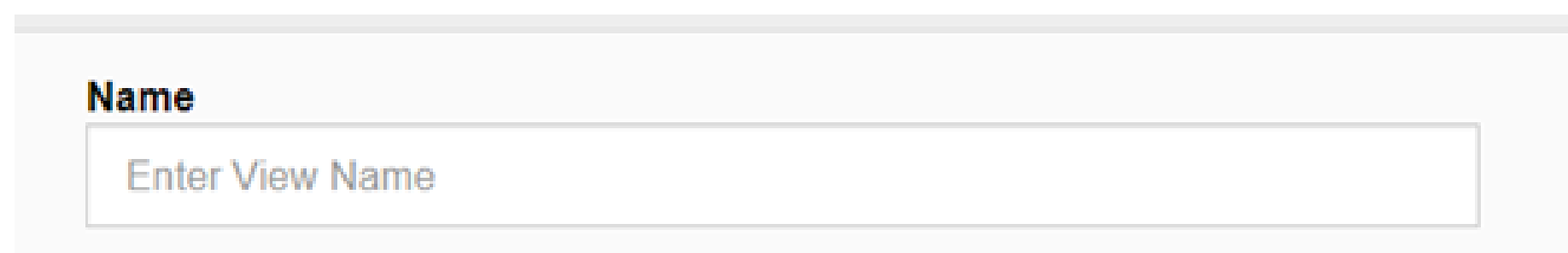
3

In the Choose Filter Type select Task By Name.



4

In the Name field give Your list a unique name



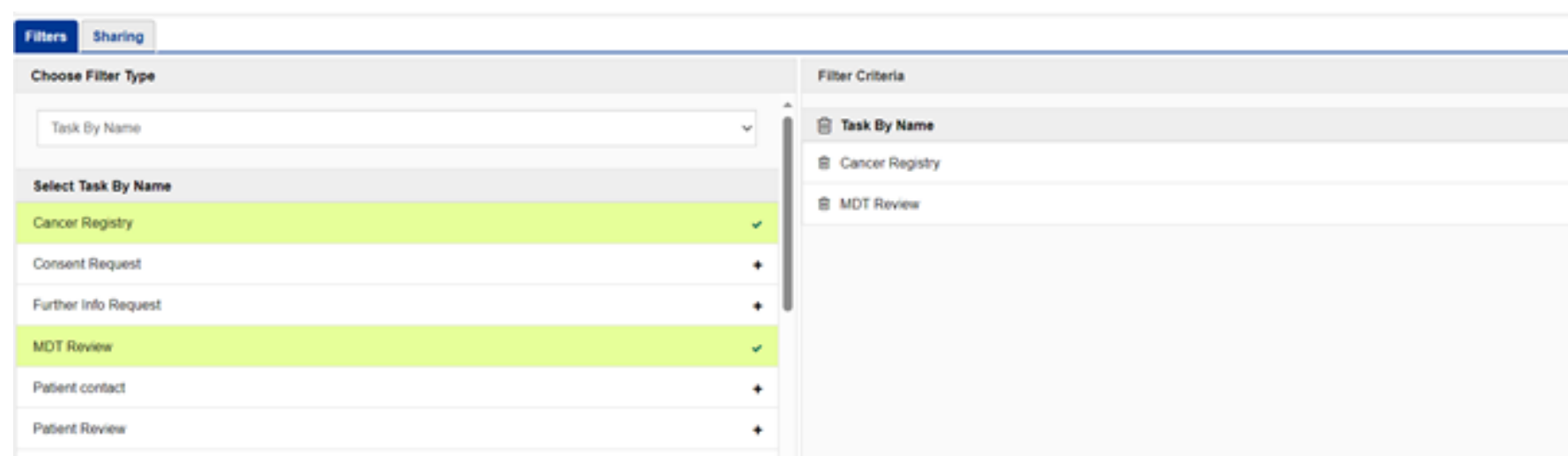
For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net or

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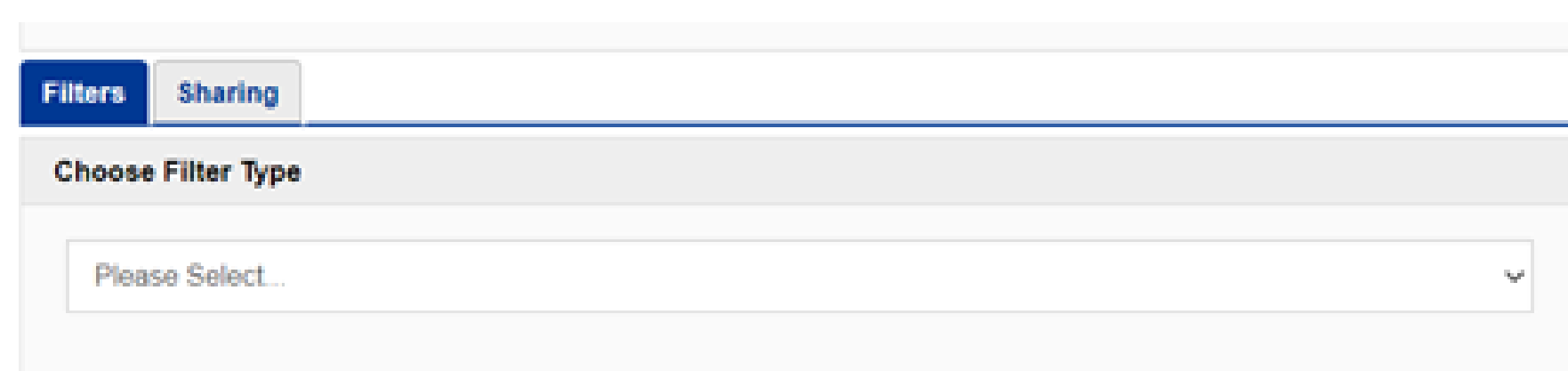
5

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

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.

For further information please contact:

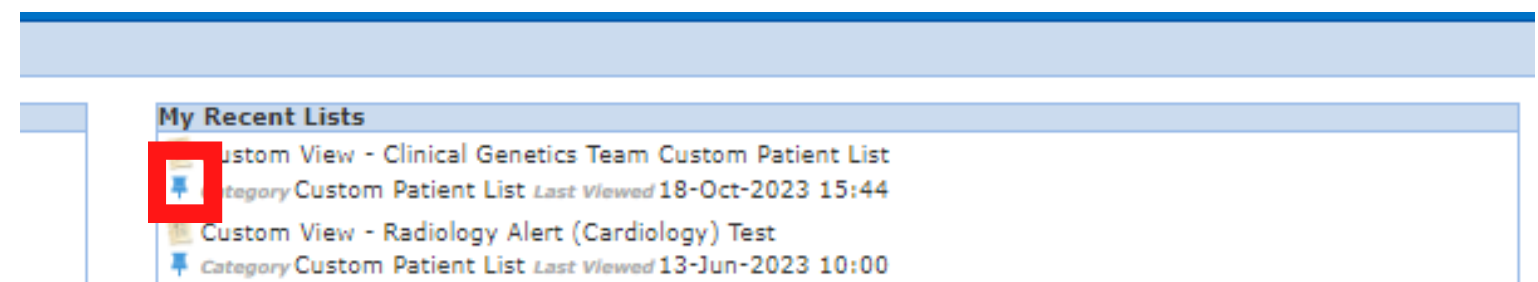
✉ leadsth-tr.ImplementationTeam@nhs.net or ☎ 0113 206 0599

How to find your tasks assigned to me

Custom list

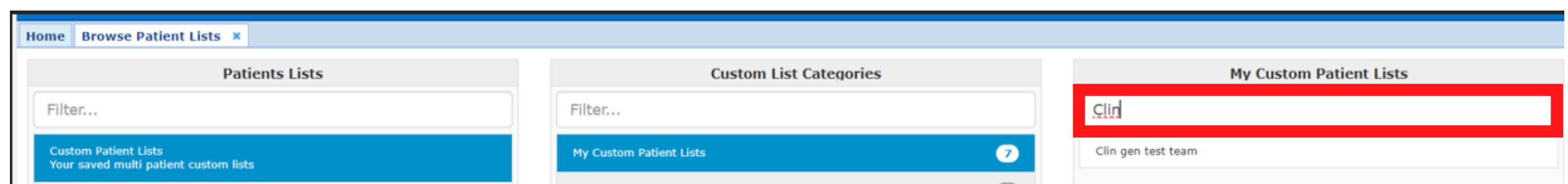
1

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](#).

For further information please contact:

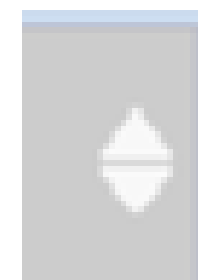
✉ leedsth-tr.ImplementationTeam@nhs.net or ☎ 0113 206 0599

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. 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:

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

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**.

The screenshot shows the 'Add Document' interface. The search filter is set to 'Adhoc'. Below the search bar, there are two dropdown menus: 'Show All' and 'Sort By Favourites'. The main content area displays 'In Progress (Drafts)' with the message 'There are no draft documents'. At the bottom, there is a section titled 'Add New Document' containing a button labeled 'Create Adhoc Task' with a star icon and a 'Tasks' link.

2

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

The left screenshot shows the 'Add Document' screen with the 'Create Adhoc Task' button highlighted by a red box, and a star icon next to it. The right screenshot shows the 'Add Document' screen with a list of eForms. The 'Create Adhoc Task' button is highlighted by a red box, and a star icon is next to it. The list of eForms includes: 'Criteria Led Discharge Assessment' (Medical Assessment), 'Deteriorating Patient Screening Tool (Sepsis / Non-sepsis) (Adult)' (Nursing Assessment Tool), 'Height and Weight Record' (Nursing Assessment Tool), 'Specialist Referral' (Referral), and '12-17 Safeguarding Risk Assessment' (Other Assessments).

3

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

The screenshot shows the 'Create task' form. The patient information is displayed at the top: 'EPSISING, One', '08-Feb-1996', 'Sex: Female', and 'NHS No.'. Below this, there is a 'Create task' section with a 'Select...' dropdown menu highlighted by a red box. The dropdown menu is open, showing 'Clinical Genetics Team' as the selected option. Below the dropdown, there is a 'Select...' dropdown menu for 'The type of the task to create'. At the bottom, there are fields for 'Due Date' (19/10/2023) and 'Due Time' (13:55).

For further information please contact:

✉ leadsth-tr.ImplementationTeam@nhs.net or

☎ 0113 206 0599

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.**

The screenshot shows the 'Create Adhoc Task' form for patient 'SEPSISING, One'. The 'Team' dropdown is set to 'Clinical Genetics Team'. The 'Assignee' dropdown is highlighted with a red box and contains the text 'TESTUSER, Muthu (Mrs) TA - Accident and Emergency'. Other fields include 'Task name' (set to 'Select...'), 'Due Date' (19/10/2023), and 'Due Time' (13:55).

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**.

The screenshot shows the 'Create Adhoc Task' form with the 'Task name' dropdown menu open. The 'Team' is 'Clinical Genetics Team' and the 'Assignee' is 'TESTUSER, Muthu (Mrs) TA - Accident and Emergency'. The dropdown menu lists several options, with 'Consent Request' highlighted. Other fields include 'Due Date' (19/10/2023) and 'Due Time' (13:55).

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.

The screenshot shows the 'Create Adhoc Task' form with the 'Due Date' and 'Due Time' fields highlighted in red. The 'Task name' is 'Consent Request'. The 'Due Date' is 19/10/2023 and the 'Due Time' is 15:55. The 'Team' and 'Assignee' fields are also visible.

For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net or

 0113 206 0599

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

For further information please contact:

 leadsth-tr.ImplementationTeam@nhs.net or  0113 206 0599

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**.



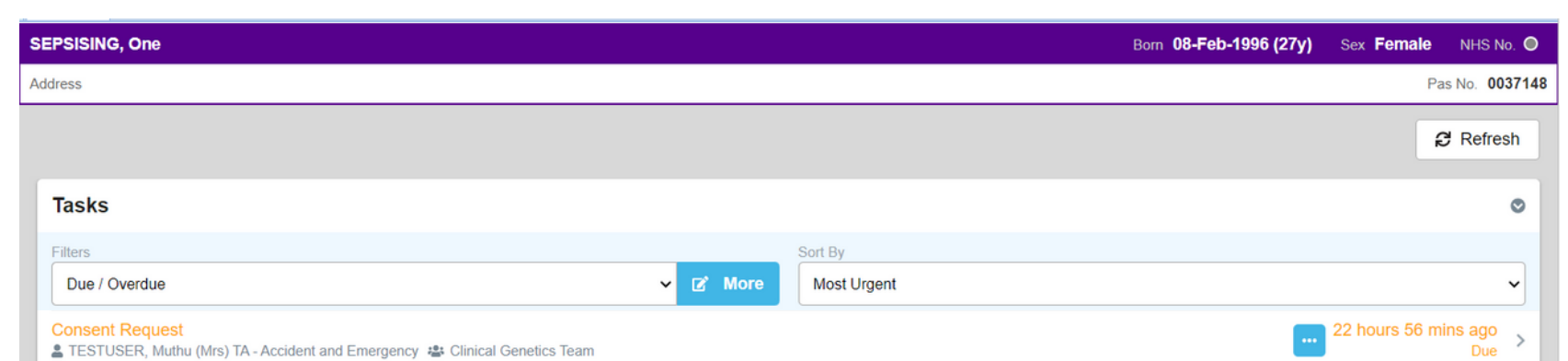
2

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



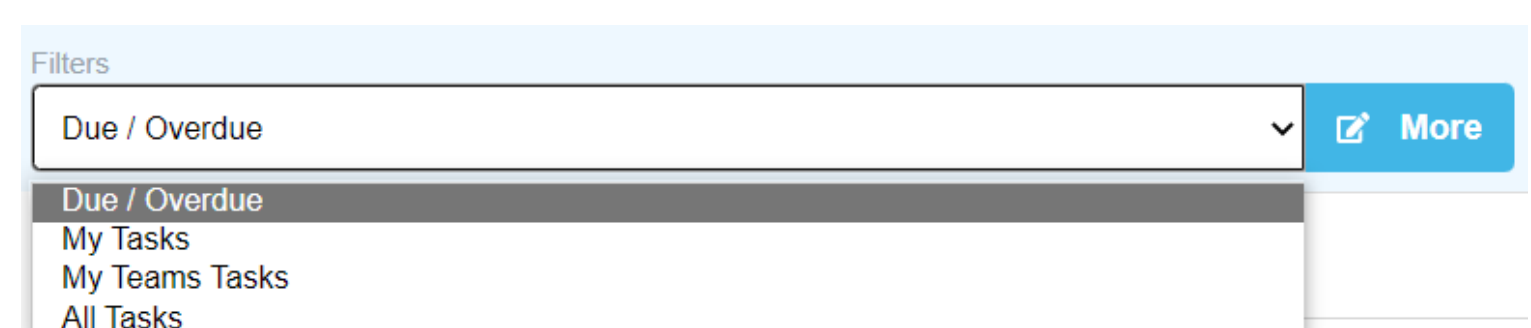
3

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**.



For further information please contact:

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

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.

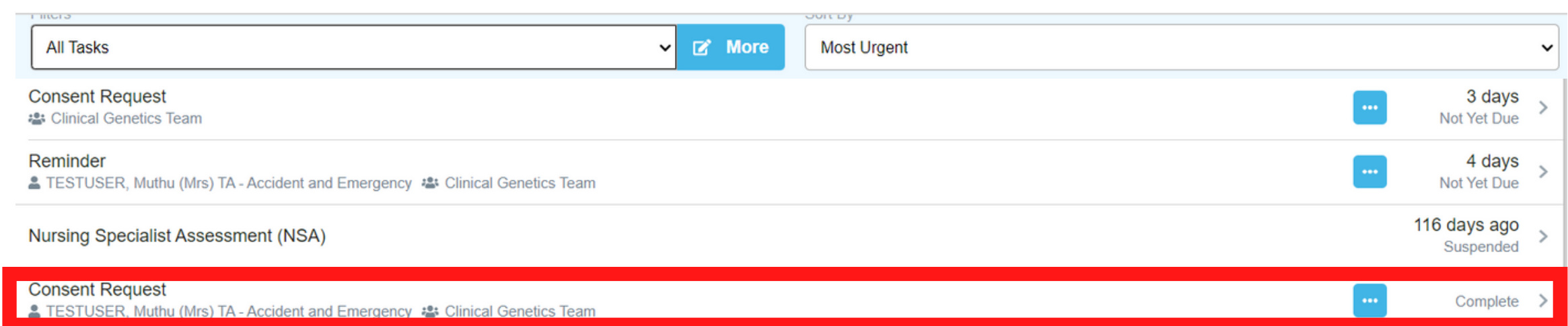
Submit

For further information please contact:

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

8

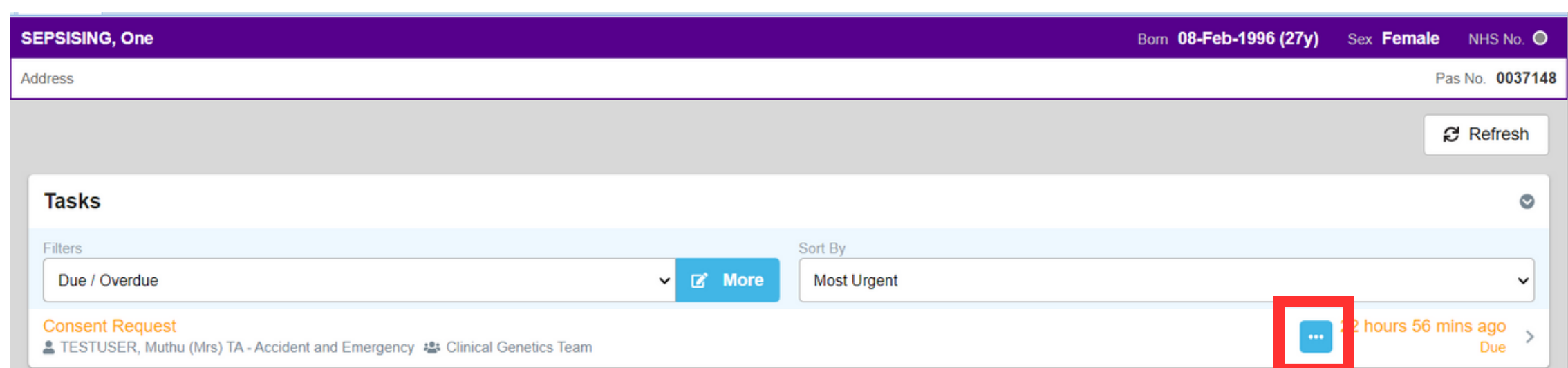
When back on the **Patient Tasks Dashboard**, if you change the filter to **All Tasks** and then scroll down you can see your **completed task and upcoming due tasks for the Patient too**. You can view the **Timeline** for your completed tasks.



9

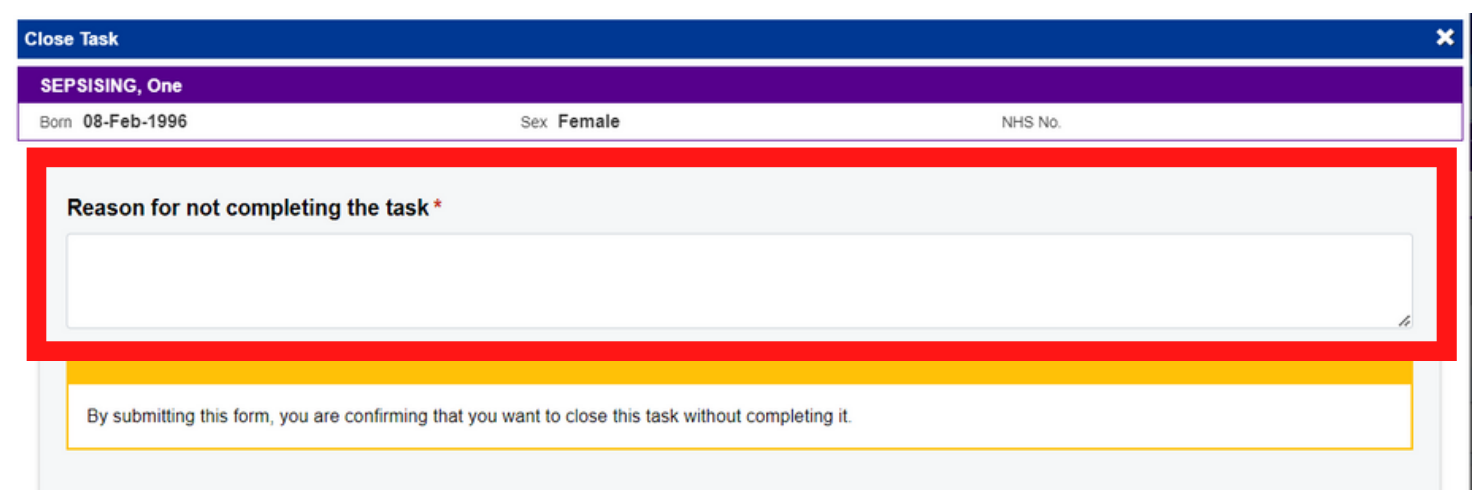
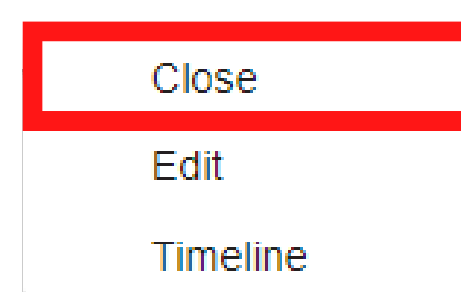
Clicking on the Blue square in the task's field gives options to **Edit, Close or View Tasks Timeline**.

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**.



For further information please contact:

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

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.**

Close
Edit
Timeline

Reassign Adhoc Task

SEPSISING, One
Born 08-Feb-1996 Sex Female NHS No.

Create task

Team *
Clinical Genetics Team
The team the task will be assigned to

Assignee
TESTUSER, Muthu (Mrs) TA - Accident and Emergency
The team member the task will be assigned to (optional)

Task name *
Consent Request
The type of the task to create

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.

Due Date *
09/02/2024
09-Feb-2024

Due Time *
09:25

Do you want to change the due date / time?
 I want to change the due date / time

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**.

Edit Adhoc Task

TEST, Banana Split
Born 14-Oct-2005 Sex Male NHS No. 969 124 0513

Edit Task Reason

Please enter a reason for editing this task

Author
COOKLAND, Drew (Mr) - (Admin - Clinical Geneti)

Date of activity *
09/02/2024
09-Feb-2024

Time of activity *
11:52
Format HH:mm

Profession *
Select...

Specialty *
Clinical Genetics

Type of note *
Admin

Subject Line
The task 'Correspondence' created on '09/Feb/2024 09:25' has been changed.

Notes *
B I U

Discard Submit

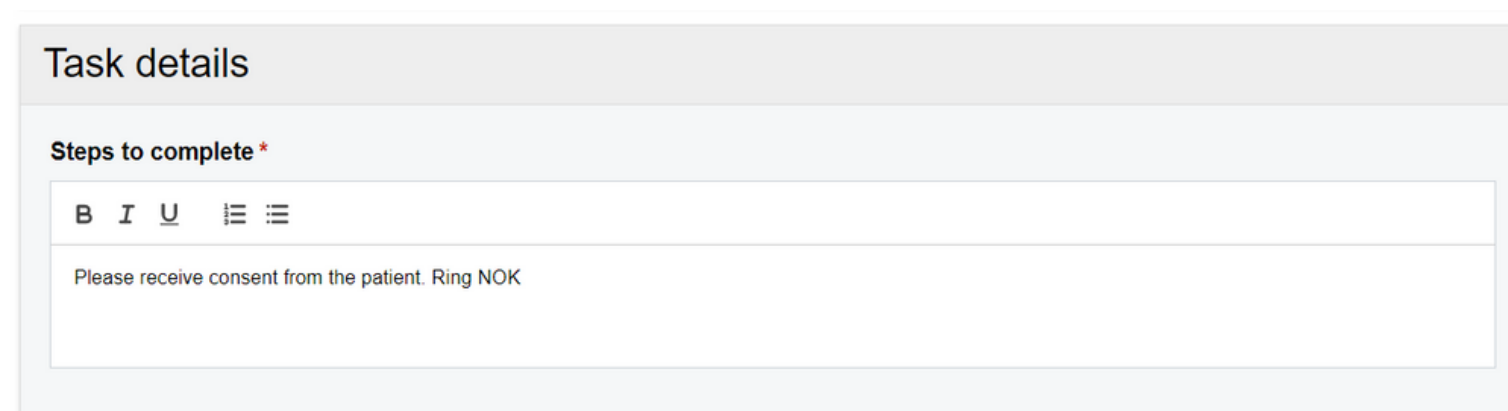
Please be aware, following submission the **'Edit Task Reason'** will only be visible on the Task's **Timeline**.

For further information please contact:

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

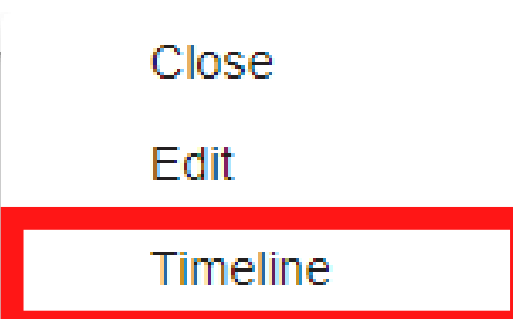
14

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**.



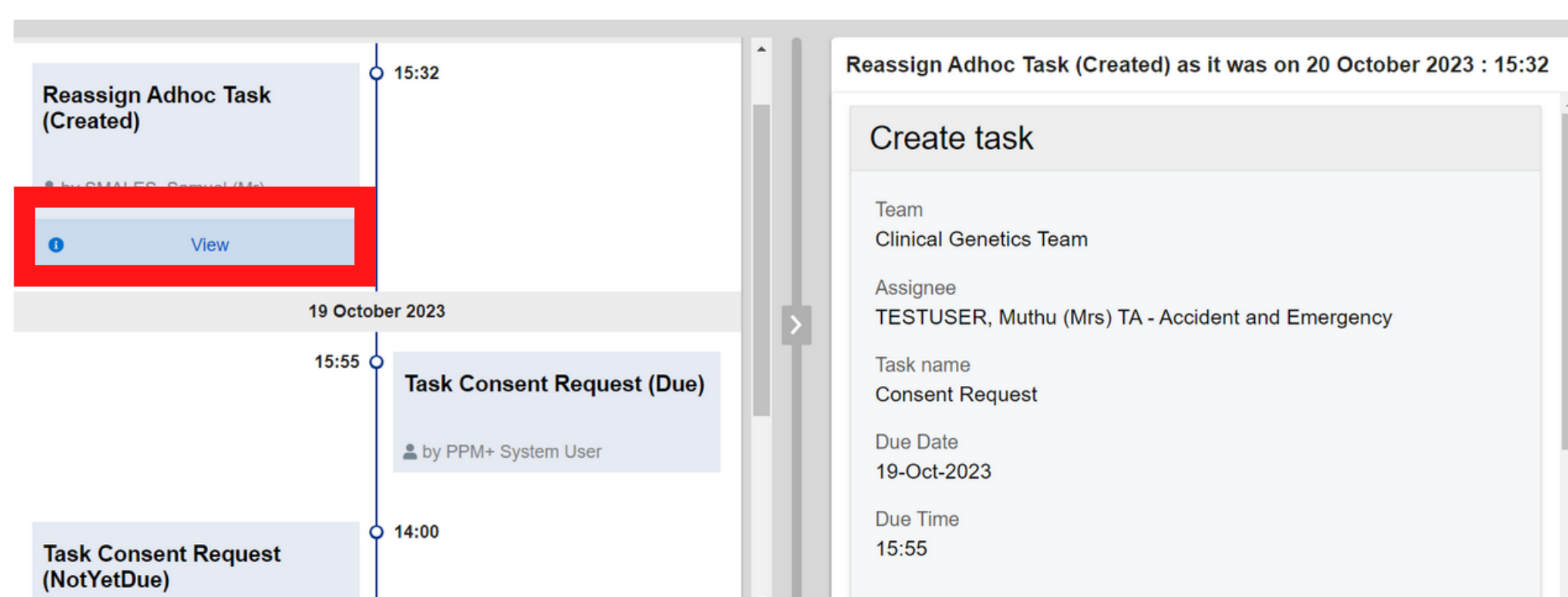
15

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**.



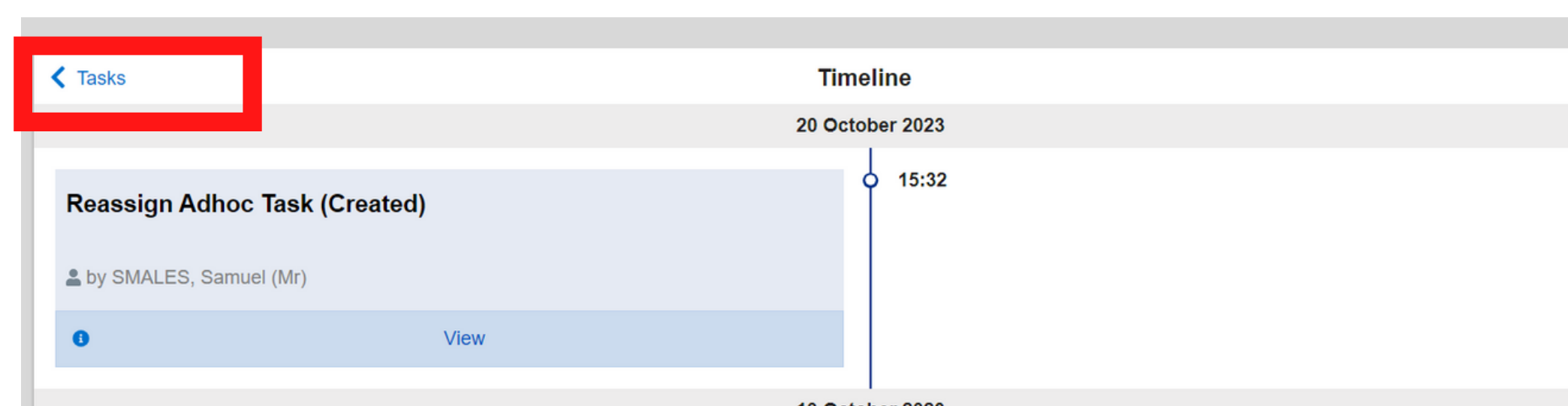
16

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**.



17

Click on **Tasks** to return to the **Patient's Tasks Dashboard**.



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**.

Clinical Genetics Team Custom Patient List									
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 14:46	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

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.

Task List

TESTML, Taskd (Mrs)
Born 17-Oct-1982 Sex Female NHS No.

To Do 6 Overdue 6 Due 0 All 7

- 5 Days Ago Patient Pathway Planning
- 5 Days Ago Nursing Specialist Assessment (NSA)
- 4 Days Ago Observations Intervention Required
- 4 Days Ago Observations Due
- 3 Days Ago MDT Review**
- 2 Days Ago Further Info Request

Refresh Close

2

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

Complete Adhoc Task

TESTML, Taskd (Mrs)
Born 17-Oct-1982 Sex Female NHS No.

Task details

Steps to complete
dsdsd

Complete Task

Have all appropriate steps been followed?*

No Yes

Submit

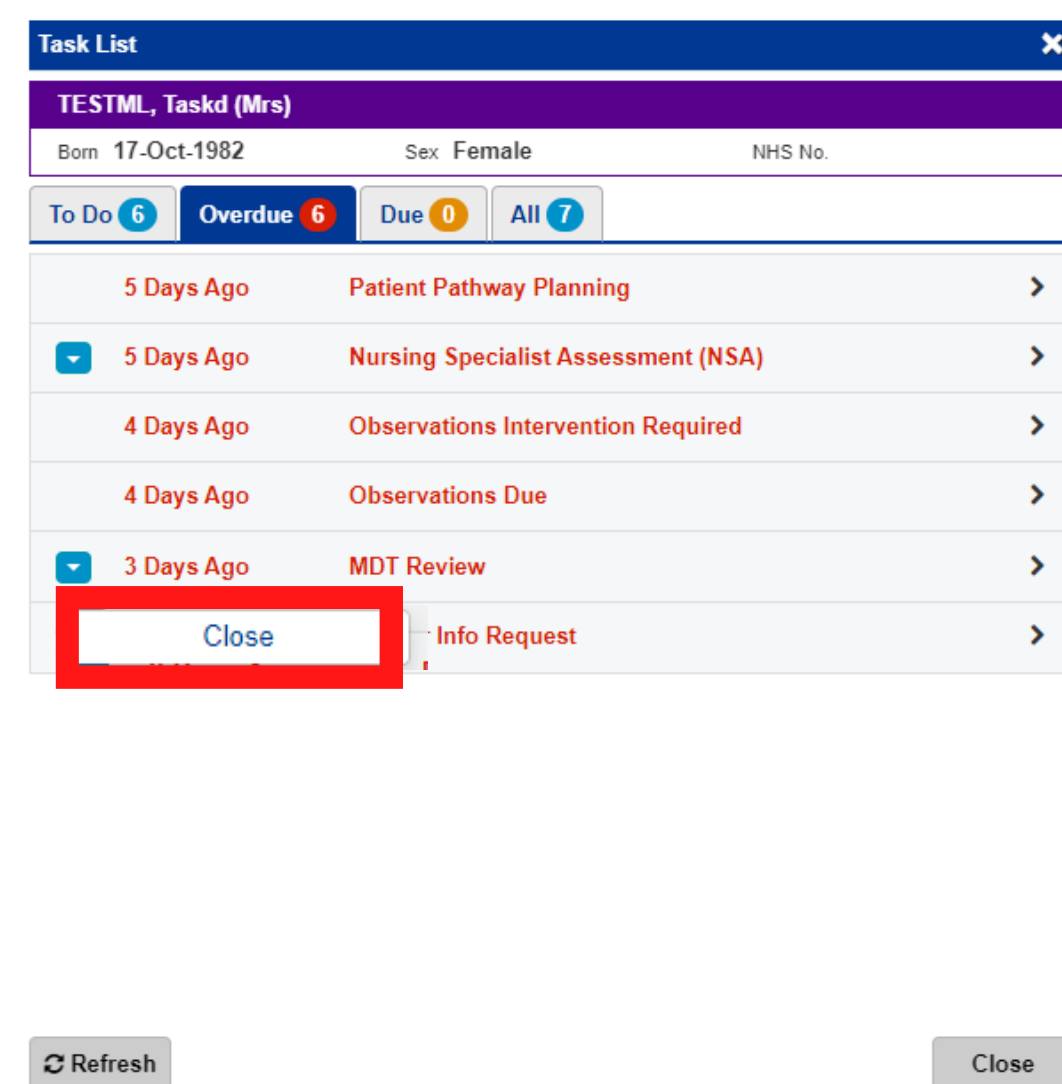
For further information please contact:

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

3

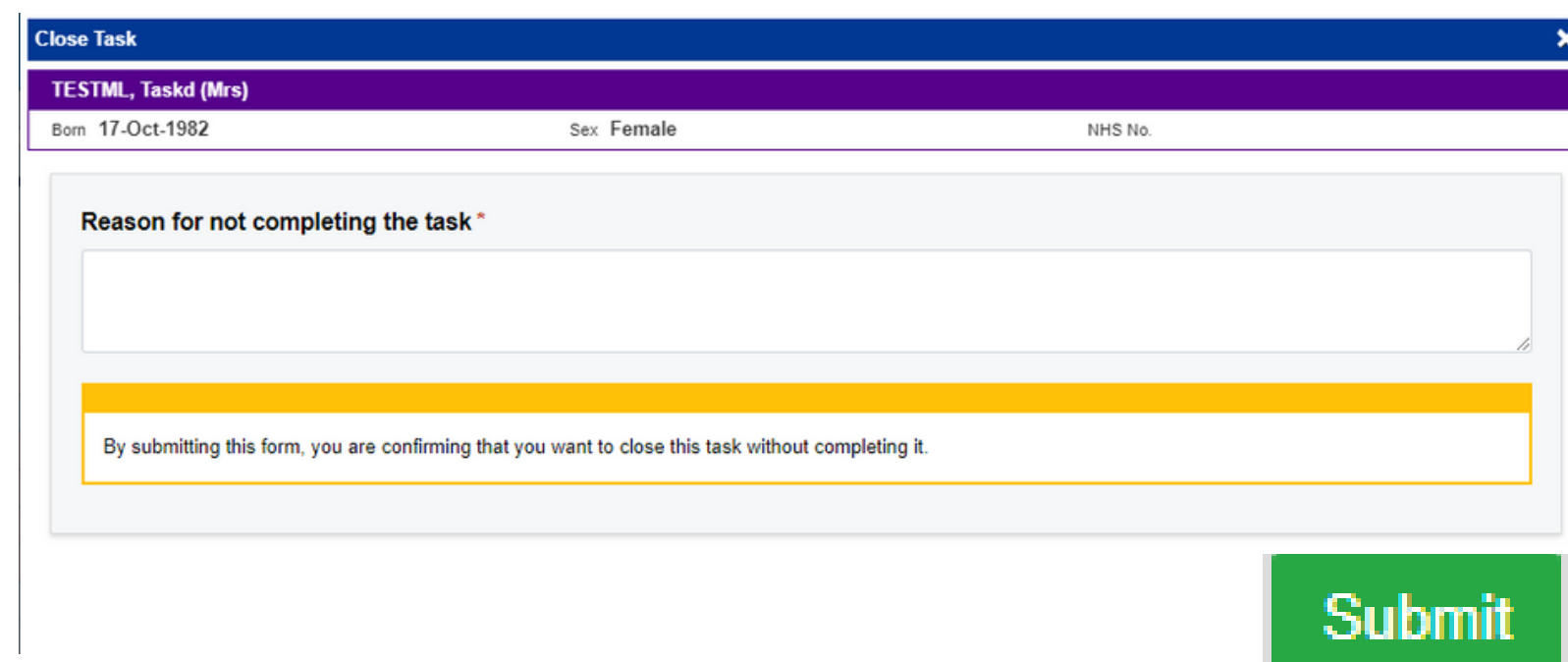
You can also Close the **Adhoc Task** by Clicking on the Blue Square next to the Adhoc Tasks name and then Click on Close.

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.



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<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