

# Patients to be added to a Surgical Waiting List

# User Guide - Day to Day use of the filtered Patients to be added to the Surgical Waiting List lists



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Ability to share the relevant Filtered Patients to be Added to the Surgical Waiting List with you

## The filtered Patients to be Added to the Surgical Waiting List covering your Business units will have been already created by your Business Manager.

To be able to share the list with you, you must have your PPM+ contact created.

If you have not already created your PPM+ contact, <u>Click Here</u> to find out how.

### Viewing the Filtered List and Actioning Tasks

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Home		
Actions		0
Patient Lists		<u>^</u>
Browse List	>	11
Create Patient List		1 1
Custom Patient List	>	

Patients Lists		Custom List Categories	i	My Custom Patient Lists	
Filter		Filter		Filter	
Custom Patient Lists Your saved multi patient custom lists	2	My Custom Patient Lists	<u> </u>	test	
Inpatient (Wards)		My Teams Custom Patient Lists	0	test 2	4
Ward stay multi patient views		My Organisation Custom Patient Lists	8	Test Custom Patient List	
Multidisciplinary Teams Available MDT's for you		Outpatient (Clinics)	0	test list 2	

Step 1

From your PPM+ Homepage, click on **Browse List**.

#### Step 2

From **Patients Lists**, select **Custom Patient Lists**.

Step 3 Select My Custom Patient Lists and it will show all the filtered lists shared with you.

#### Step 4

From **My Custom Patient Lists**, select the relevant list you want to view. Any list that is **shared with you** will appear here with the name of the list followed by **(Shared)**.



**Step 5:** Your bespoke **Filtered List** will then be displayed.



My Recent Lists Custom View - Patients to be Added to a Surgical Waiting List (Cardiology) Category Custom Patient List Last Viewed 28-Sep-2022 11:25 Step 6: Once you have viewed the list, it will appear on My Recent
Lists on the right hand side of the
Homepage on PPM+. You can pin it to fix it to the top of the list.
Simply click on the pin icon next to the Filtered List.

#### If you are unable to find your team's Filtered List for Patients to be Added to a Surgical Waiting List or need one to be created, please contact your Business Manager to highlight the issue and they will be able to assist.

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Action Patient Age Task	<u>Fasks</u>	Age	NHS Number		Patient	Action
Four O 33y 2 due	3 (6 overdue, 2 due)	33y		0	TESTTEAM Four	

The Leeds Teaching Hospitals

**Step 7:** When the filtered List opens, click on the **Task Column** cell of the required patient.

**Step 8:** Open the **Surgical Waiting List** Task.

Please note, you may also see a Pre-assessment Appointment task, this should only be completed by staff who book Pre-assessment Appointments.

**Step 9:** The task will open the **Patients to be added to the Surgical Waiting List eForm**. Use the Single Patient View to view the patients Pre-Assessment Surgical Booking form if required.

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Please note, If the patient has had multiple Pre-assessment Surgical Booking eForms completed for different surgical procedures, a task for each procedure will show in the Task list on the Patients to be Added to a Surgical Waiting List filtered list. Please ensure you select the task associated with the surgical procedure you are reviewing.

Step 10 : Before completing the Surgical Waiting List Task and therefore removing the patient from the Patients to be Added to the Surgical Waiting List filtered list, they need to be reviewed on PAS to ensure they have a correct Surgical Waiting List entry, if required - <u>See Appendix 1</u>.



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ients to be Added to Surgical Waiting List			
SURGICAL, Uat Test (Mr)	Born 15-Sep-1965 (57y)	Gender Male	NHS number
Address St. James's Universi, Beckett Street, I	eeds, LS9 7TF		PAS number 9036255
Surgical Waiting List Boo	ked		
Reason for removal *		Further detail	
O Surgery no longer required			
I have reviewed PAS and the patient was alm Waiting List / I have reviewed PAS and have	eady on the correct Surgical now added the patient to the		h
correct Surgical Waiting List			
			Submit
			Construct

Step 11: Select the relevant option from the 'task box' and select Submit. This will add the eForm to the patient's record and close the Task, removing the patient from the Filtered List.

If you complete the Surgical Waiting List Booked eForm for a patient, you can view the completed eForm in the patient's Single Patient View.

Please be aware, this task is to confirm that the patient is on a PAS Surgical Waiting List. The task does not update the PAS list. Once you have actioned the task in PPM+, the task will close and patient will be removed from the relevant Filtered List for Patients to be Added to a Surgical Waiting List.



#### Patient added to incorrect Filtered List

If there is a patient on your list who should be managed by another team please email the appropriate team and advise them of the patient's name, NHS number and the date their Pre-assessment Surgical Booking eform was completed. This date shows in the 'Date Submitted' column on your list. Ask the correct team to review the patient on PAS and email back to confirm whether:

A. I have reviewed PAS and the patient was already on the correct WL/ I have reviewed PAS and have now added the patient to the correct Surgical Waiting List

> or B. whether surgery is no longer required

You can then complete the task by selecting the correct response emailed. DO NOT REMOVE THE PATIENT/COMPLETE THE TASK on your custom list until you have received the confirmation email. If you have any issues getting the patient reviewed or are unsure which CSU to email please contact your Business Manager for support.



## Withdrawing the eForm

**Step 1:** If the task has been completed in error, it is possible to withdraw the eForm and reopen the **Patients to be Added to a Surgical Waiting List task** in the relevant **Filtered List**. First, access your required patient's **Single Patient View**.

Patient to be added to a Sur(×	Show Booked and Delivere
Summary <i>C</i>	Add 🗸

Step 2: Next, Type Patients to be added to Surgical Waiting List into the filter.

Single Patient View Add Clinical Note Add Clinical Document Launch Task

## **Step 3:** Click on the **eForm** on the left hand side, then click on **Withdraw**.

Summary 2022	0	Add ~	Q Expand ⊖ Print ≠Edit
01-Sep-2022	Pre-Op Assess	Patients to be Added to Surgical Wa	Surgical Waiting List Booked
07-Jun-2022	Pre-Op Assess	Patients to be Added to Surgical Wa	Cargical Walking List Booked
2019			
12-Nov-2019	Medical Assess	Outpatient Venous Thromboembolis	Reason for removal
11-Nov-2019	Medical Assess	Outpatient Venous Thromboembolis	<ul> <li>Added to surgical waiting list</li> </ul>
		A	



Step 4: Complete the reason to withdraw the eForm and then click Withdraw. This will add the patient back onto the relevant
Patients to be Added to a Surgical
Waiting List Filtered List and reopen the Surgical Waiting List Task.



#### **Useful Contacts**

Please contact the **Implementation Team** for **Digital Support & Training** on PPM+ functionalities.

Ext: 60599

leedsth-tr.ImplementationTeam@nhs.net

Please contact the Informatics Service Desk at x26655 or visit the portal at **https://lth-dwp.onbmc.com/** to:

- Reset your password.
- Report a problem you are having within PPM+ functionality.
- Report a data quality problem within PPM+.
- Request new user accounts for PPM+.
- Disable PPM+ accounts for any leavers from your department.

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

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

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



### Appendix 1 - Patient Centre checks on patients from your filtered list

#### These checks should be carried out on EVERY patient before they are removed from the Patients to be Added to The Surgical Waiting List <u>Filtered List.</u>

Rangadiar Patient List - Name	Search	880
E Appetenting (P) E Appetenting (P) E Canada Sinagarand (D) E Canada (	Ad State Ad State Gas Nation Sources Former Box State Sources Former Box State Sources Former Former Box State Sources Former F	Care Care

Step 1: Click Patient Search.

Step 2: Copy the patient's PAS number and paste the PAS number in the PAS number field.





Step 3: Click on the patient, so they appear in the banner at the top of the page.

Inpatients Ward List for a		
<ul> <li>Inpatients Ward Sumame</li> </ul>		
IP by Consultant across F		
Patient General Search (F		
Patient Pathways RTT Wa		
Patients Awaiting Admiss		
<ul> <li>Patients by Name (PL)</li> </ul>		
<ul> <li>Patients by Number (PL)</li> </ul>		
Ready for Discharge (PL)		
Recent List (PL)		
- TCILIST(PL)		
- Walton List Partial Bookir		
- Wallon Lists (PL)		
Walten Lists Ordentiants		
Walten Liste Canica Cro		
- Want Bandars (DL)		
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Papers Revise ()	Charlose rudina (L-1) and the market	_

Step 4: Go to Episode Enquiry.

Step 5: Check the patient has a waiting list entry and is on the correct waiting list for this procedure (they may be on a WL for a different procedure/under a different Business Unit, so it is important to check they are on the WL for the procedure on the Surgical Booking form you reviewed in PPM+). If the patient is not already on a waiting list for this particular procedure, then you will need to add them to the correct waiting list.

Episo	pisode Enquiry (PT)									
	Date	Status	Hosp	Ward	Consultant	Spec	Case Note No	WList	RTT Status	
1	28-Nov-2022	WL ACTV	LGI	L18	DR DJ BLACKMAN	CARD		DANB		



Episode Enquiry (PT)											
	Date	Status	Hosp	Ward	Consultant	Spec	Case Note No	WList	RTT Status	RTT Wait	Pathway Numbe
i	30-Nov-2022	WL ACTV	SJUH	ZZZ	DR DJ BLACKMAN	CARD	TH8640	CARVPL		000W 0D	

Step 6: Ensure that the patient is on an active Referral to Treatment (RTT) pathway with the weeks wait being correct. Active RTT pathways are either red, green or blue. Exception to this is for patients on an elective planned IPWL.

For any queries around how to check the patient is on the correct WL please contact the PAS Training Team - <u>ittraining.ltht@nhs.net</u>.