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**NHS**
The Leeds
Teaching Hospitals
NHS Trust

# Patients to be added to a Surgical Waiting List

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

# Contents Page

# 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, Click Here to find out how.**

# Viewing the Filtered List and Actioning Tasks
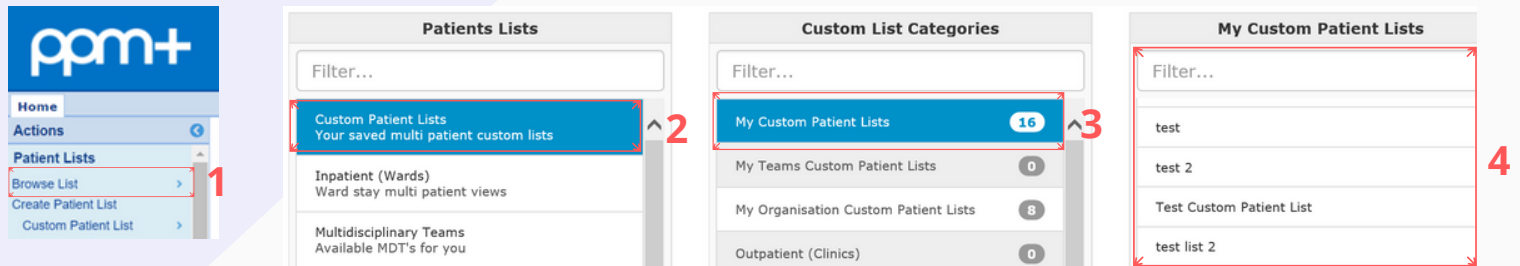


## Step 1

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.



Patients to be Added to a Surgical Waiting List (Cardiology) ⓘ

| Action | Patient | NHS Number | Age | Tasks | Main Consultant | Speciality | Business Unit | Priority |
|--------|---------|------------|-----|-------|-----------------|-----------|---------------|----------|



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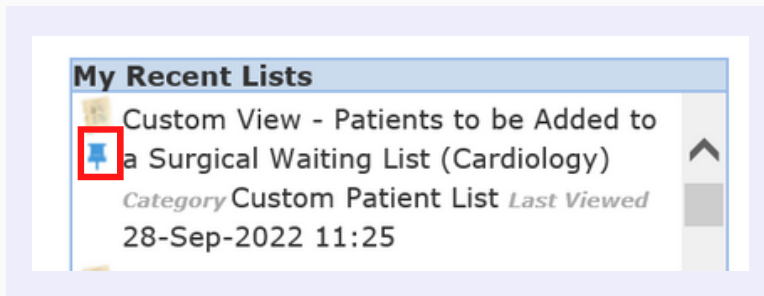
**If you are unable to find your team's Filtered List for Patients to be Added to a Surgical Waiting List or need one to be created, please contact your Business Manager to highlight the issue and they will be able to assist.**

| Action | Patient | | NHS Number | Age | Tasks | |
|---|---|---|---|---|---|---|
| 🔽 | TESTTEAM Four | ⚠️ | | 33y | 8 (6 overdue, 2 due) | ❓ |

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

Hepatobiliary and Pancreatic Surgery - 105 - J02 Partial excision... - Surgical Waiting List  ›

**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.**

| 5 Hours 59 Mins Ago | ENT - 120 - F34 Excision of tonsil - Pre-assessment Appointment | › |
|---|---|---|

**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.

**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 - See Appendix 1.**

**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.**
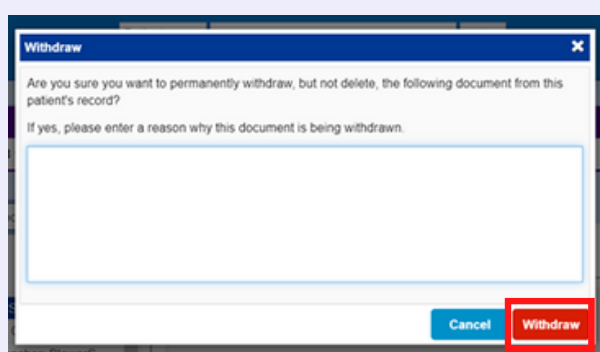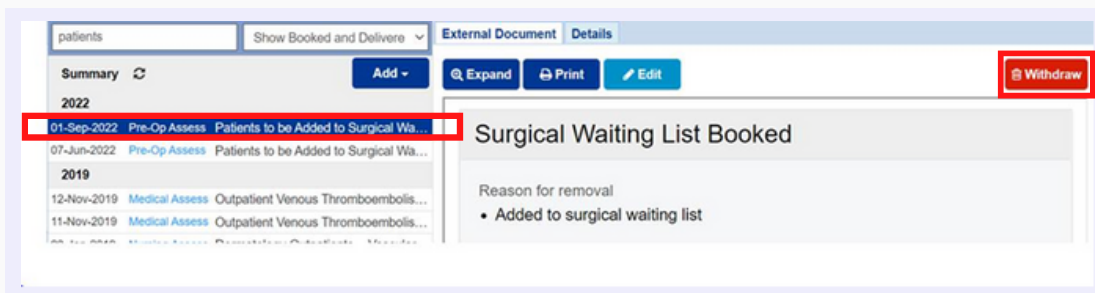
# Withdrawing the eForm

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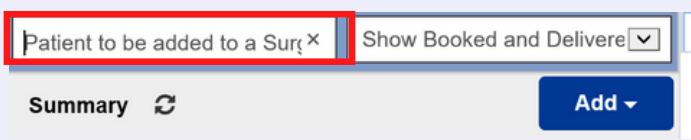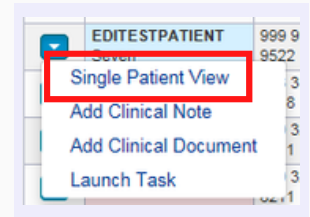
**Step 2:** Next, Type **Patients to be added to Surgical Waiting List** into the filter.

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

**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+**, **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.

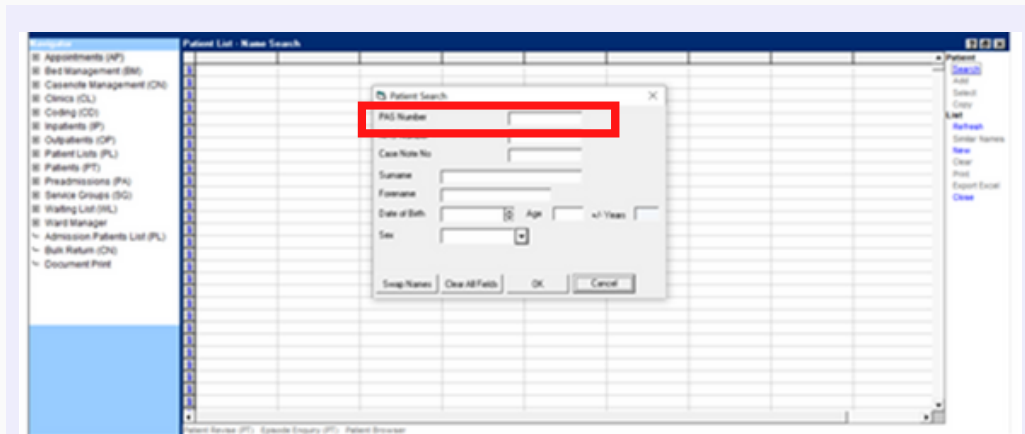**PPM+ Help Site**: **https://www.ppmsupport.leedsth.nhs.uk/**

# 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 Filtered List.**
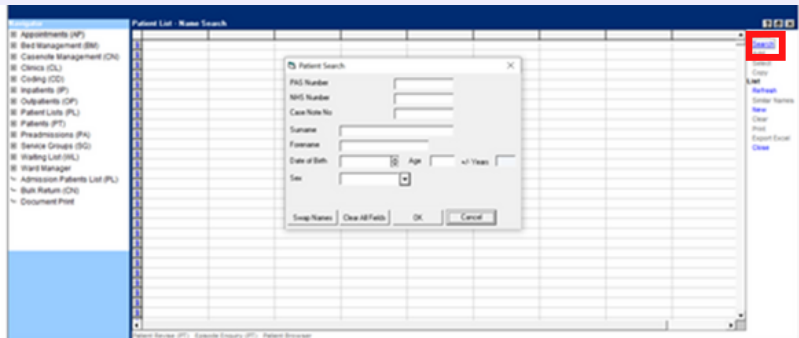


**Step 1: Click Patient Search.**

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



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

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



**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.**



| | Date | Status | Hosp | Ward | Consultant | Spec | Case Note No | WList | RTT Status |
|---|---|---|---|---|---|---|---|---|---|
| i | 28-Nov-2022 | WL ACTV | LGI | L18 | DR DJ BLACKMAN | CARD | | DANB | |

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**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 - ittraining.ltht@nhs.net.**