



Adding And Editing Your Contact On PPM+

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES



Contents page

Adding your contact ----- **Pages 3 - 5**

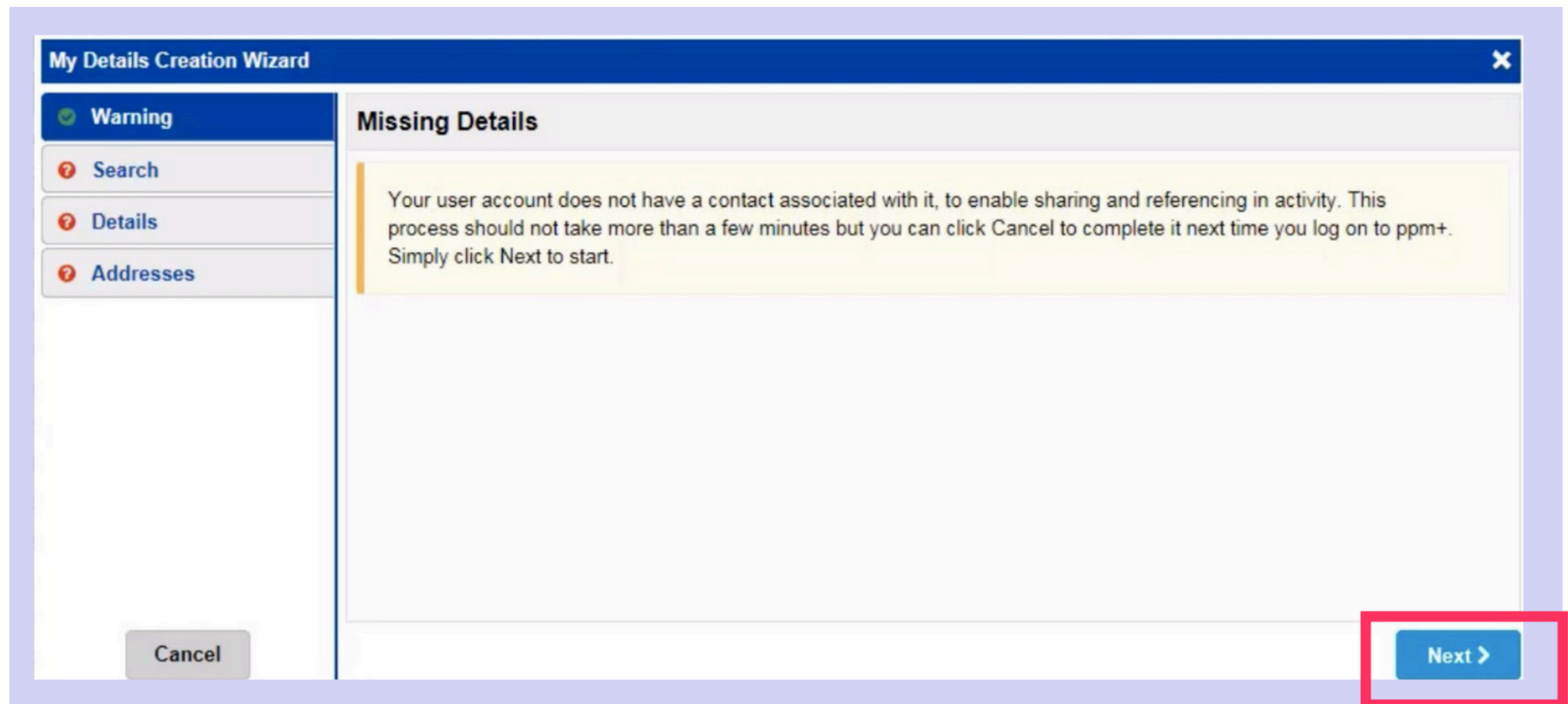
Editing your contact ----- **Pages 6 - 8**

Useful Contacts ----- **Page 9**



Adding Your Contact

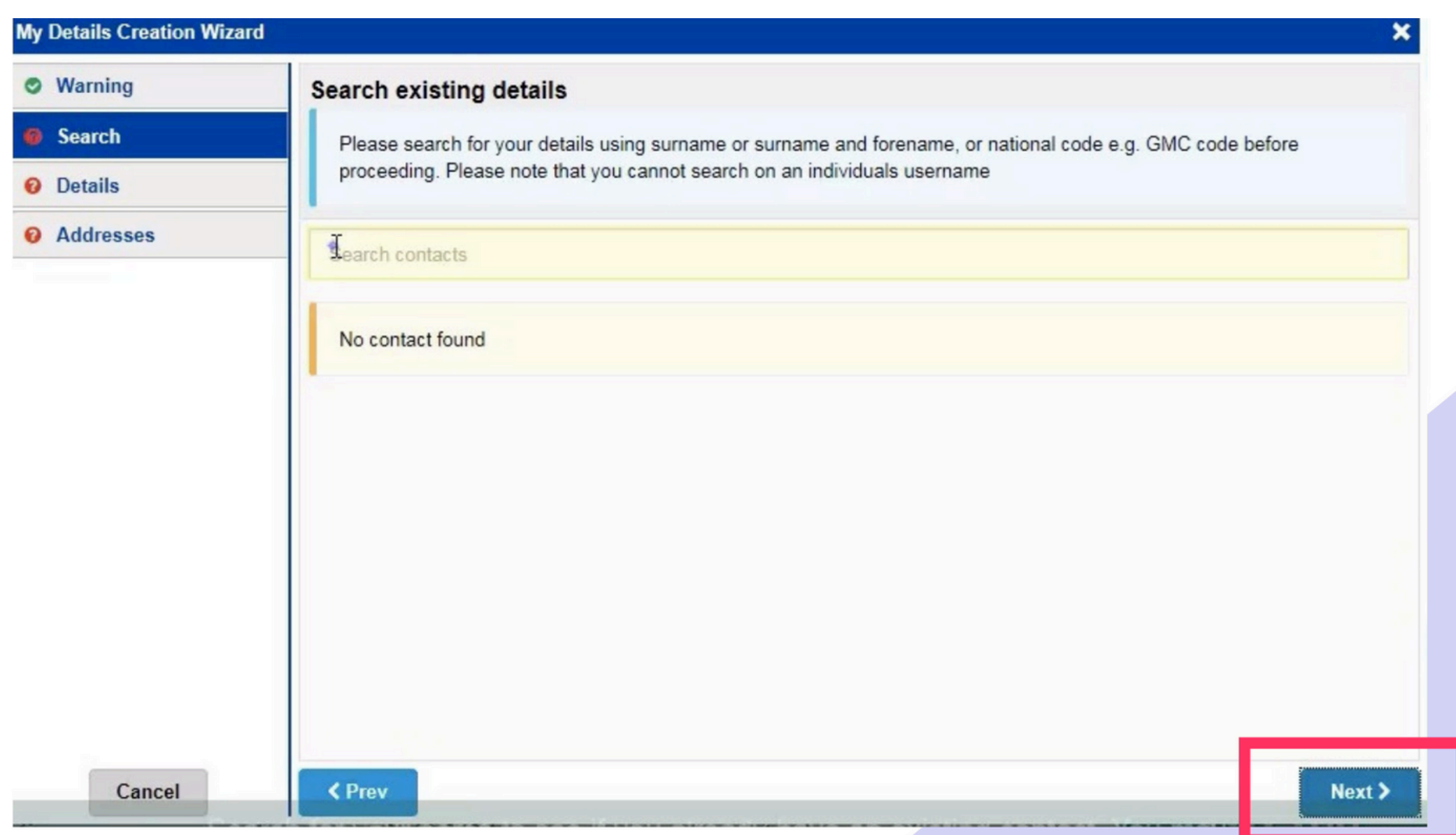
- 1 If you have not already created a contact on PPM+, the **My Details Creation Wizard** will appear when you log in. The steps to follow to create a contact are shown below.



The screenshot shows the 'My Details Creation Wizard' window. On the left is a sidebar with a 'Warning' section (green checkmark) and three steps: 'Search' (red question mark), 'Details' (red question mark), and 'Addresses' (red question mark). The main panel is titled 'Missing Details' and contains a yellow message box stating: 'Your user account does not have a contact associated with it, to enable sharing and referencing in activity. This process should not take more than a few minutes but you can click Cancel to complete it next time you log on to ppm+. Simply click Next to start.' At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next >' button, which is highlighted with a red rectangular box.

Click on Next to begin.

- 2 Search for your name to see if you already have an existing contact (you may have an existing contact if you have previously worked for the Trust). Select your contact if it appears in the search results. If no contact is found click **Next**.



The screenshot shows the 'My Details Creation Wizard' window at the 'Search existing details' step. The sidebar is the same as in the previous screenshot, with 'Search' now highlighted. The main panel has a title 'Search existing details' and a light blue instruction box: 'Please search for your details using surname or surname and forename, or national code e.g. GMC code before proceeding. Please note that you cannot search on an individuals username'. Below this is a yellow search input field with the placeholder text 'Search contacts'. Underneath the input field is a yellow message box that says 'No contact found'. At the bottom, there are three buttons: 'Cancel' on the left, '< Prev' in the center, and 'Next >' on the right. The 'Next >' button is highlighted with a red rectangular box.

3

In the **My Details** section complete the fields shown. Please note the asterisk '*' indicates which sections are mandatory. When finished click **Next**.

My Details Creation Wizard

Warning Search Details Addresses

Details

Type *
Nurse

Title
Ms

Forenames *
Your

Surname *
Name

Position / Job Title
Registered Nurse

National Code (e.g. GMC/Other)
123456789

Cancel < Prev Next >

4

Click on **Add** to add your address, if you work across multiple sites you can add more than one.

My Details Creation Wizard

Warning Search Details Addresses

Addresses

Filter Addresses

Show Active Sort by address ascending

Active Addresses 0

+ Add

No Addresses.

Cancel < Prev Save

5

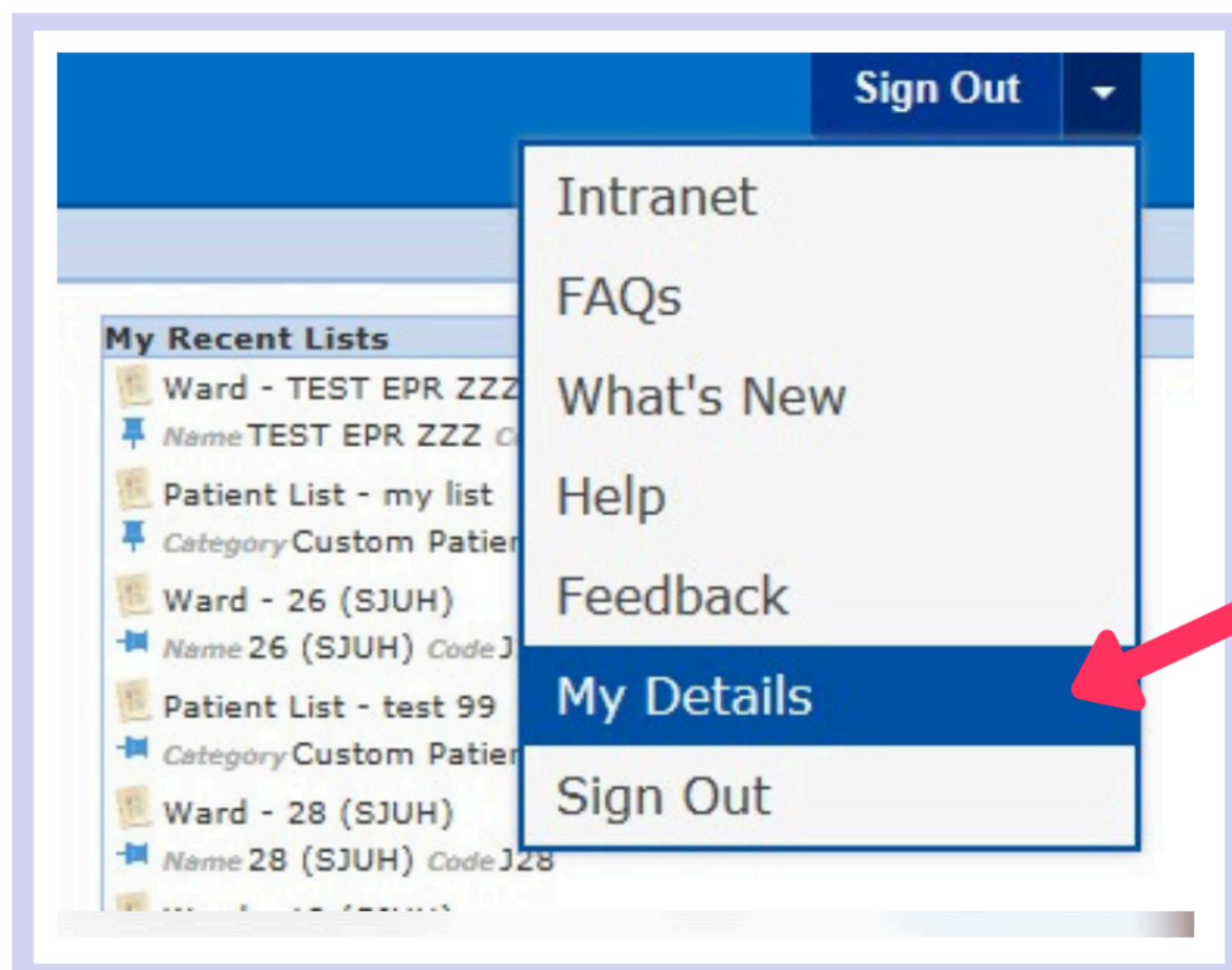
Select or add your department and click Next.
Then click Save to complete contact information.

The screenshot shows the 'My Details Creation Wizard' interface. On the left, a sidebar contains a list of steps: Warning, Search, Details, and Addresses (which is currently selected). The main area is titled 'Addresses' and includes a 'Filter Addresses' input, a 'Show Active' button, and a section for 'Active Addresses' which currently shows 'No Addresses.' A modal window is open in the center, displaying the address 'St James's University Hospital, Beckett Street, Leeds, LS9 7TF'. Below the address, there is a 'Department*' dropdown menu with the option '<General Address>' selected. To the right of the dropdown is a '+ New Department' button. At the bottom of the modal are three buttons: 'Cancel', '< Prev', and 'Next >'. A red arrow points to the 'Next >' button. In the bottom right corner of the main wizard window, there is a 'Save' button with a checkmark icon, which is highlighted by a red rectangle.

Editing Your Contact

1

You can edit your contact details at any time in the **My Details** link from the user menu shown below.



2

In the **My Details** section you can edit or add to any of these fields. When completed click **Save** or click **Next** to move on to the next section.

A screenshot of the 'My Details Edit Wizard' form. The form has a sidebar with tabs: Details (selected), Specialties, Addresses, Teams, and Linked Account. The main form area contains the following fields: Type (dropdown menu with 'Admin' selected), Title (dropdown menu with 'Miss' selected), Forenames (text input with 'Hannah'), Surname (text input with 'Johnson'), Position / Job Title (text input with 'Project Support Officer'), and National Code (e.g. GMC/Other) (text input). At the bottom right, there are two buttons: 'Next >' and 'Save' (with a checkmark icon). These buttons are highlighted with a red rectangle.

- 3 Click **Add** and select your speciality, you have the option to select multiple specialties this section.

The screenshot shows the 'My Details Edit Wizard' interface. On the left, a sidebar contains links for 'Details', 'Specialties', 'Addresses', 'Teams', and 'Linked Account', all marked with green checkmarks. The 'Specialties' section is active. It features a 'Filter Specialties' search bar, a 'Show Active' checkbox, and a 'Sort by name ascending' dropdown. Below these, the 'Active Specialties' section shows a count of 0 and a '+ Add' button. A red arrow points to the '+ Add' button. At the bottom, there are 'Cancel', '< Prev', 'Next >', and 'Save' buttons.

- 4 The first speciality you add will automatically be your **main speciality**, by clicking the blue drop down arrow you can remove or make another speciality your **main speciality**

The screenshot shows the 'My Details Edit Wizard' interface with two active specialties. The 'Active Specialties' section shows a count of 2. A red box highlights the '+ Add' button. A dropdown menu is open for the first specialty, 'Allied Health Professional', showing options to 'Mark as main' and 'Remove'. The 'Main' label is visible next to the first specialty. At the bottom, there are 'Cancel', '< Prev', 'Next >', and 'Save' buttons.

- 5 By using the **add** button you can add additional Trust sites and select one to make your 'active' or 'main' location.

The screenshot shows the 'My Details Edit Wizard' interface with the 'Addresses' tab selected. The left sidebar contains a list of sections: Details, Specialties, Addresses (highlighted), Teams, and Linked Account. The main area is titled 'Addresses' and includes a 'Filter Addresses' search bar, a 'Show Active' dropdown, and a 'Sort by address ascending' dropdown. Below these is a table of 'Active Addresses' with one entry: 'St James's University Hospital, Beckett Street, Leeds, LS9 7TF'. To the right of this entry are two buttons: 'Main' (highlighted with a red box) and 'Active'. A '+ Add' button is located at the top right of the table. At the bottom of the wizard are 'Cancel', '< Prev', 'Next >', and 'Save' buttons.

- 6 Click on the **blue arrow** to customise your associated period to that site and **edit** communication information for the specific location you work in

The screenshot shows the 'My Details Edit Wizard' interface with the 'Specialties' tab selected. The left sidebar contains a list of sections: Details, Specialties (highlighted), Addresses, Teams, and Linked Account. The main area is titled 'Specialties' and includes a 'Filter Specialties' search bar, a 'Show Active' dropdown, and a 'Sort by name ascending' dropdown. Below these is a table of 'Active Specialties' with two entries: 'Allied Health Professional' (960) and 'Allied Health Professional' (190). Both entries have an 'Active' status. A dropdown menu is open for the first entry, showing options: 'Mark as main' (checked) and 'Remove'. A 'Main' button is also visible. A '+ Add' button is located at the top right of the table. At the bottom of the wizard are 'Cancel', '< Prev', 'Next >', and 'Save' buttons. The 'Next >' and 'Save' buttons are highlighted with a red box.

Remember to click on **Save**, once finished

Useful contacts

Informatics Service Desk

If you are having problems with logging in or using PPM+, please contact the Informatics Service Desk for your organisation in the first instance.

If still experiencing issues please contact the LTHT Informatics Service Desk on informaticsservicedesk.lth@nhs.net or 0113 3926655.

For further information and helpful guides on using PPM+ please see the link to our PPM+ Help Site:



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