

ppm+

Assessment Record eForm/Dashboard

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES

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How to Add an Assessment Record eForm/Navigate to the Assessment Record Dashboard

1

To add an **Assessment Record eForm** and to navigate to the **Assessment Record Dashboard** for a **Assessment Record eForm** for the first time, you need to add and complete an eForm/Clinical Document associated with the dashboard. The **overall** eForm/Clinical Document is called **Assessment Record**. To find out how to add an eForm/Clinical Document via the Desktop version of PPM+, please follow the Clinical Document guide by [Clicking Here](#).



2

This is also possible via the **PPM+ Mobile App** too. To find out how to add an eForm/Clinical Document via the **PPM Mobile App**, please follow the **PPM+ Mobile App** guide by [Clicking Here](#).



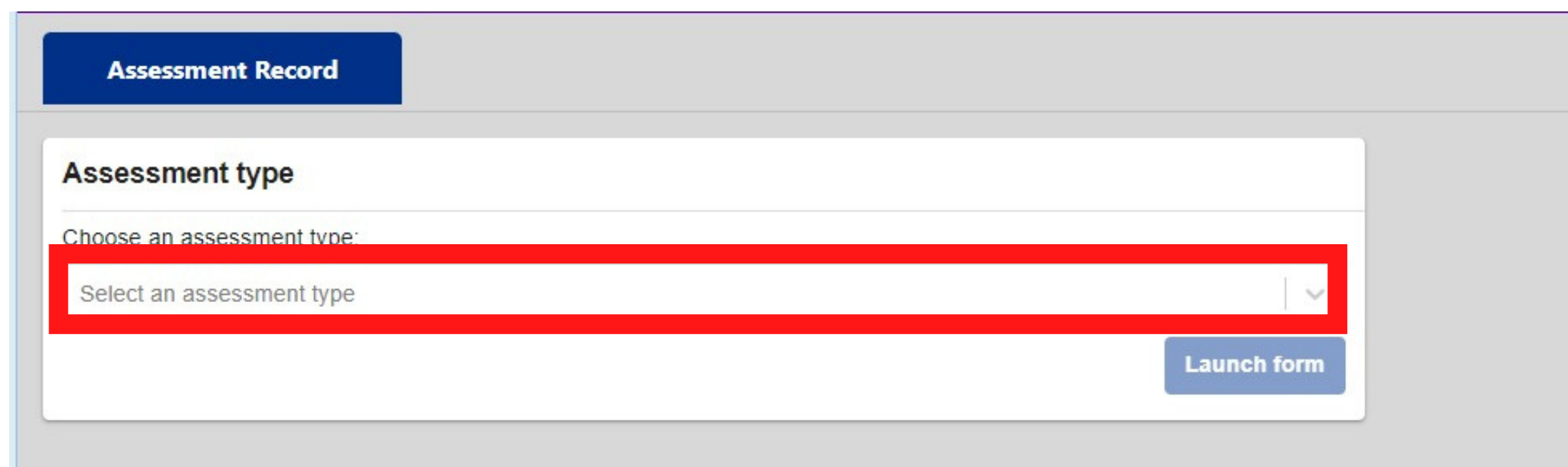
For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

Completing an Assessment Record eForm

1

When the **eForm/Dashboard** opens, click within the **Select an Assessment type** field to chose which assessment type you wish to complete for your patient.

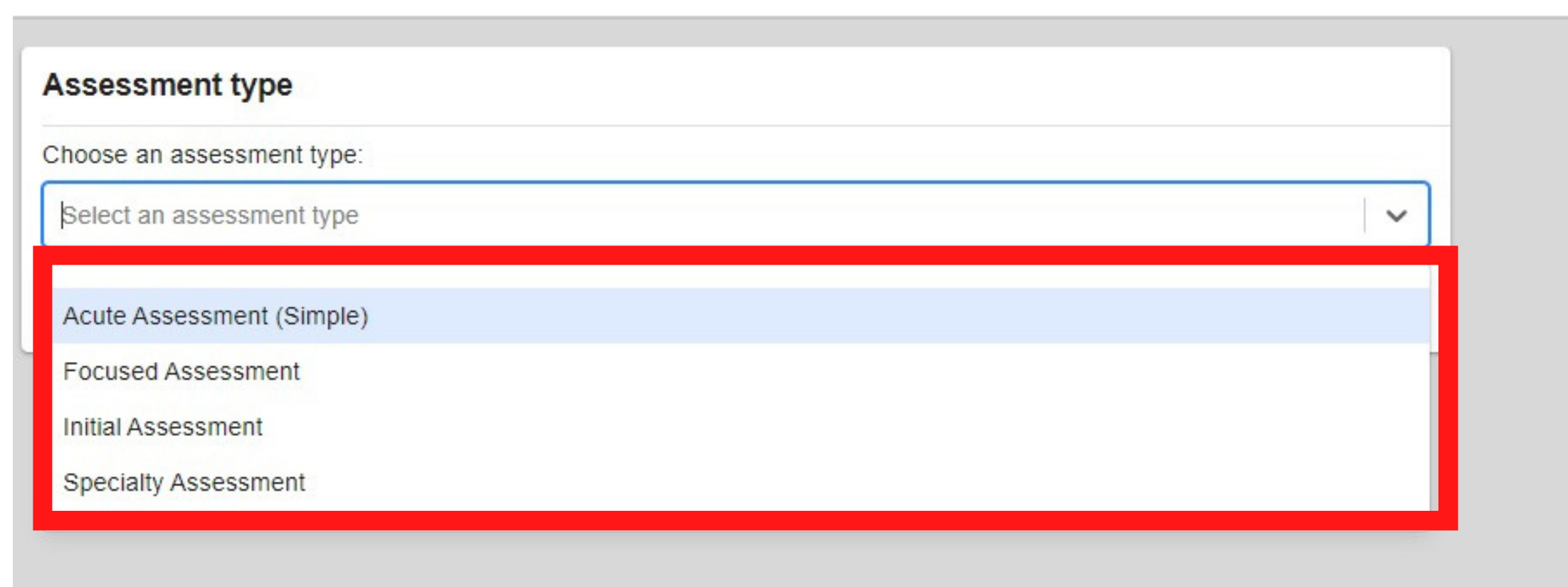


The screenshot shows a web interface titled 'Assessment Record'. Below the title is a section labeled 'Assessment type'. Inside this section, there is a text input field with the placeholder text 'Select an assessment type' and a dropdown arrow on the right. A red rectangular box highlights this input field. To the right of the input field is a blue button labeled 'Launch form'.

2

Click on the assessment type you wish to complete. The options to chose from are:

- **Acute Assessment (Simple)**
- **Focused Assessment**
- **Initial Assessment**
- **Speciality Assessment**



The screenshot shows the 'Assessment type' section from the previous image, but with the dropdown menu open. The dropdown menu is highlighted with a red rectangular box and contains the following options: 'Acute Assessment (Simple)', 'Focused Assessment', 'Initial Assessment', and 'Specialty Assessment'. The first option, 'Acute Assessment (Simple)', is highlighted in light blue.

For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net

3

When you have selected the **Assessment Record eForm** you wish to complete, click on **Launch form**. For the purpose of this User Guide, we have selected **Acute Assessment (Simple)**.

Assessment type

Choose an assessment type:

Acute Assessment (Simple) | v

Launch form

4

Work your way through the **Assessment Record eForm**, completing as much as possible.

Please be aware, switching away from this form will cause any unsaved data to be lost.

Select Specialities

Specialities *

Acute Internal Medicine x | v

History of Presenting Complaint

History of Presenting Complaint

B I U | v

Abdominal pain, constipation for last 2/52

Previous Medical History

Previous Medical History

Allergies and Adverse Reactions

Does patient have any known allergies or adverse reactions? *

Yes

No

Unknown

Please record all known allergies and adverse reactions including any previous reactions to anaesthetics

Allergies and Adverse Reactions

Recorded By	Substance /	Effect on patient
-------------	-------------	-------------------

5

When you have completed the **Assessment Record eForm**, click on the **Submit** button.

Submit



The completed **Assessment Record eForm** will then be visible in it's own **Assessment Record Dashboard**.

Assessment Record

Timeline

Withdraw

Refresh

Acute Assessment (Simple)

Edit

Specialties

Acute Internal Medicine

Authored By: SMALES, Samuel (Mr) Project Support Officer - Clinical Genetics, The Leeds Teaching Hospitals NHS Trust on 26-Apr-2024 16:39

Diagnoses Relevant to current episode of care

Provisional, Asthma: Active

Recommended

Mark as Irrelevant

17-Jan-2025

Problems & Diagnoses

Quick Add

New Diagnosis

Filter

All

Sort By

Most Recent

Search

keywords

Provisional, Asthma: Active

17-Jan-2025

Viewing: Acute Assessment (Simple)

Edit

Print

Select Specialities

Specialties

Acute Internal Medicine

History of Presenting Complaint

History of Presenting Complaint

Abdominal Pain, constipation for last 2/52

Previous Medical History

Previous Medical History

No past medical History

Allergies and Adverse Reactions

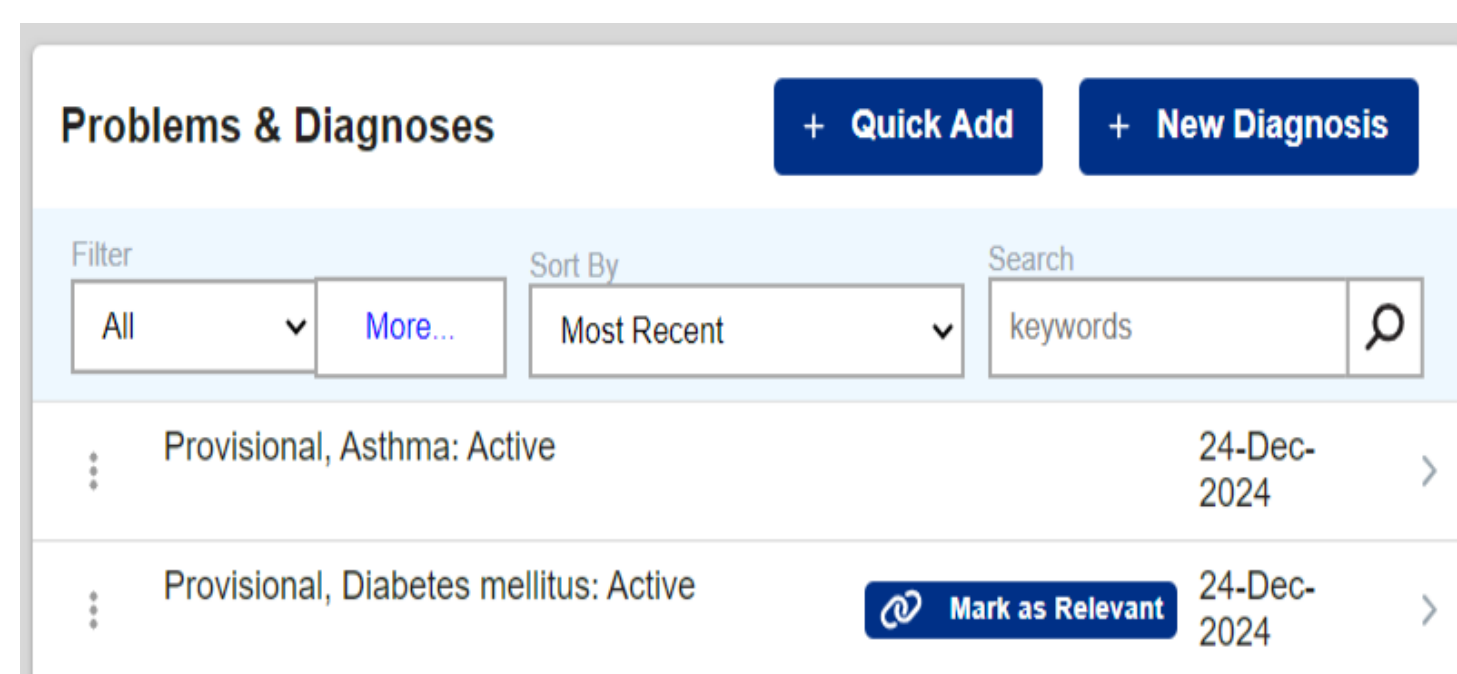
Please Note: It is possible to add another Assessment Record eForm for your patient. To do this, please repeat the steps in this User Guide starting on Page 3.

Problems & Diagnoses

Any previous **Diagnosis** will appear in the **Problems and Diagnoses widget** in the **Assessment Record Dashboard**.

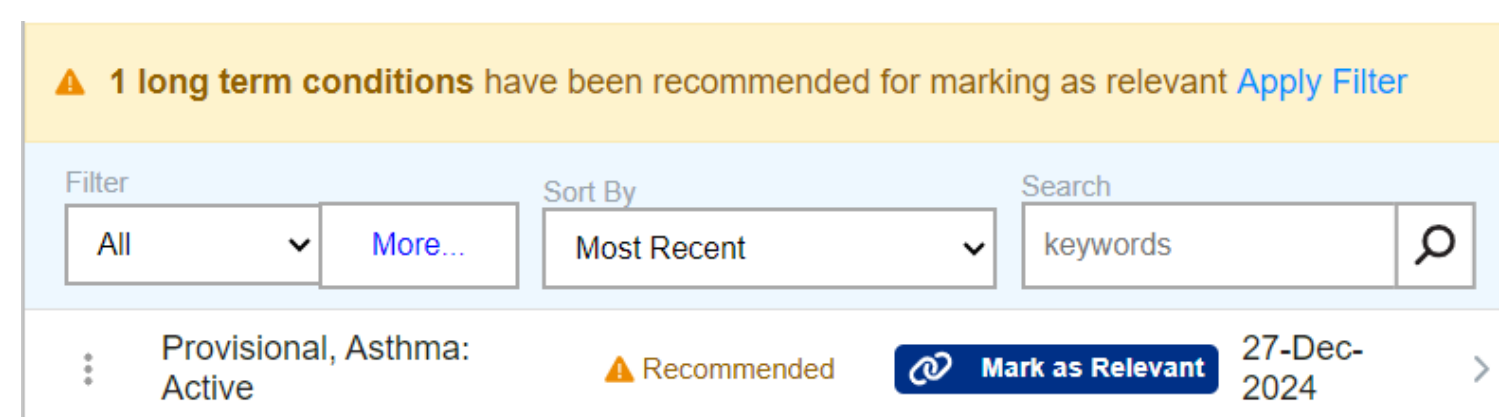
1

Please see the **Diagnosis user guide** to understand how to **add, edit** and **withdraw** a **Diagnosis** for a **Patient** via the **Problems & Diagnoses** widget by [Clicking Here](#).



2

Within the **Problems & Diagnosis widget**, the system may **recommend Diagnoses/Conditions**, that have been recorded for the **Patient**, that may be **relevant to the Patient's current episode of care** and should be **considered to be marked as relevant**.



For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

3

Click on **Apply Filter**, to only see these **recommended Diagnoses/Conditions** only, in the **Problems & Diagnosis widget**.

▲ 1 long term conditions have been recommended for marking as relevant **Apply Filter**

4

Click on **Remove Filter**, to return to see all **Diagnoses/Conditions** in the **Problems & Diagnoses widget**.

▲ 1 long term conditions have been recommended for marking as relevant **Remove Filter**

5

You can mark any **Diagnosis/Condition** as **relevant to current episode of care**. Click on the **Mark as Relevant button** for a **Diagnosis/Condition** to do this.

 **Mark as Relevant**

In doing so, the **Diagnosis/Condition** will appear in the **Problems & Diagnoses widget** in the **dashboard** and will also appear in the **Diagnoses Relevant to current episode of care widget in the Assessment Record Dashboard**.

Any other Dashboards with the Problems & Diagnoses widget and the Diagnoses Relevant to Episode of Care widget will also change to reflect any updates.

For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

Diagnoses Relevant to Current Episode of Care

1

If any **Diagnoses/Conditions** have been **marked as relevant for the current episode of care**, it will appear in this **widget**. This includes **Diagnoses/Conditions** marked as relevant on previous admissions.

Diagnoses Relevant to current episode of care			
Provisional, Diabetes mellitus type 2: Active	Recommended	 Mark as Irrelevant	30-Oct-2024 00:00 >

2

You can **Mark a Diagnosis/Condition as Irrelevant** for the **current episode of care** by clicking the **Mark as Irrelevant button** for a **Diagnosis/Condition** to remove it from the widget.



Any other Dashboards with the Problems & Diagnoses widget and the Diagnoses Relevant to Episode of Care widget will also change to reflect any updates.

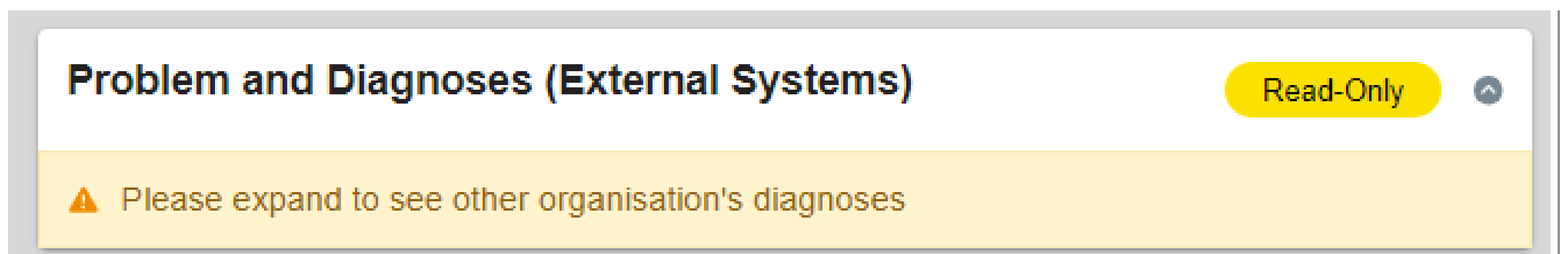
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Problem and Diagnoses (External Systems) and Tasks

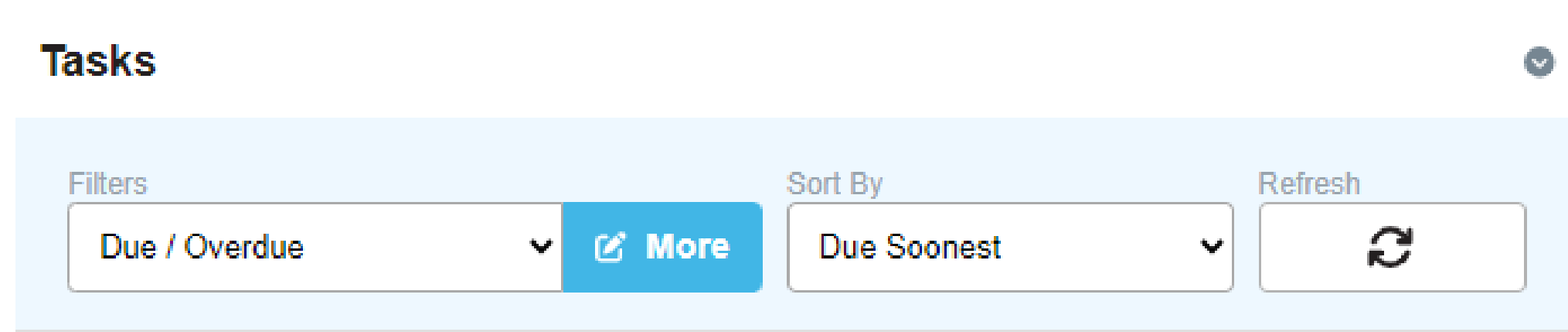
1

The **Problem and Diagnoses (External Systems)** widget is **Read Only**. It will display other organisation's Diagnoses.



2

The **Task widget** shows **all tasks** for your **Patient**. The functionality of the **Task widget** is the same as the **Task window** via the **Multi Patient View** and **Patient Tasks** in the **Single Patient View**.



For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

Viewing, Editing, Printing and Withdrawing a Completed Assessment Record eForm/Dashboard

1

Navigate to the Patient's **Single Patient View** and click on the **Assessment Record eForm** and associated **dashboard**, you wish to view. In this User Guide, we will be looking at the **Acute Assessment (Simple) Assessment Record eForm/Dashboard**.

Filter Events...	Show Booked and Delivered	Patient Clinical Alerts
Summary	Add	Date
2024		No Alerts have been retrieved for this patient.
26-Apr-2024 Medical Assess Acute Assessment (Simple): SMALE...		Patient history
25-Apr-2024 Self-Assess Holistic Needs Assessment - Patient...		No summary text entered.
25-Apr-2024 Telephone Co... Patient Form Launcher: LONG, Hay...		
25-Apr-2024 Self-Assess Holistic Needs Assessment - Patient...		
19-Apr-2024 Clinical View Recovery Care Plan		

2

The **Assessment Record eForm** and associated **Assessment Record Dashboard** will appear.

Assessment Record

Timeline

Withdraw

Refresh

Acute Assessment (Simple)

Edit

Print

Specialties

Acute Internal Medicine

Authorized By: SMALES, Samuel (Mr) Project Support Officer - Clinical Genetics, The Leeds Teaching Hospitals NHS Trust on 26-Apr-2024 16:39

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Problems & Diagnoses

Quick Add

New Diagnosis

Filter

All

Sort By

Most Recent

Search

keywords

Provisional, Asthma: Active

17-Jan-2025

Viewing: Acute Assessment (Simple)

Edit

Print

Select Specialities

Specialties

Acute Internal Medicine

History of Presenting Complaint

History of Presenting Complaint

Abdominal Pain, constipation for last 2/52

Previous Medical History

Previous Medical History

No past medical History

Allergies and Adverse Reactions

For further information please contact:

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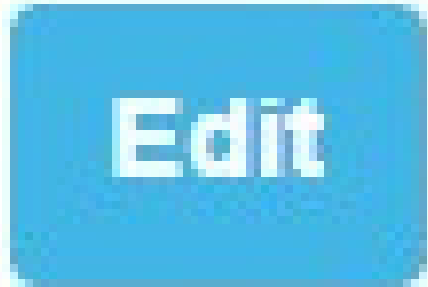
3

If you are unable to interact with all the widgets within the **Assessment Record Dashboard**, you will need to click on the **Reset to Current Time** button.



4

Click on the **Edit** button to make any **amendments** to the **Assessment Record eForm**.



5

The **Assessment Record eForm** will open on the **right hand side** of the screen. You will be able to make any necessary amendments.

Please be aware, clicking away from this form will cause any unsaved data to be lost.

Select Specialities

Specialities *

Acute Internal Medicine x | x v

History of Presenting Complaint

History of Presenting Complaint

B I U | |

Abdominal pain, constipation for last 2/52

Previous Medical History

Previous Medical History

Allergies and Adverse Reactions

Does patient have any known allergies or adverse reactions? *

Yes

No

Unknown

Please record all known allergies and adverse reactions including any previous reactions to anaesthetics

Allergies and Adverse Reactions

Recorded By	Substance /	Effect on patient
-------------	-------------	-------------------

6

When you have finished editing the **eForm**, click on the **Submit** button.



7

It is possible to **Print** out a completed **Assessment eForm**. Within the **Assessment Record Dashboard** for the **associated Assessment Record eForm**, click on the **Print** button.



8

A PDF of the completed **Assessment Record eForm** will open on the **right hand side** of the screen. Click on the **3 dots** and then click on **Print**.

Viewing last submission of: Acute Assessment (Simple)

Acute Assessment (Simple)

Select Specialities

Specialities
Acute Internal Medicine

History of Presenting Complaint

History of Presenting Complaint
Abdominal Pain, constipation for last 2/52

Previous Medical History

Previous Medical History
No past medical History

Allergies and Adverse Reactions

Does patient have any known allergies or adverse reactions?
No
No known allergies or adverse reactions

Medical Examination

Medical Examination
-

For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

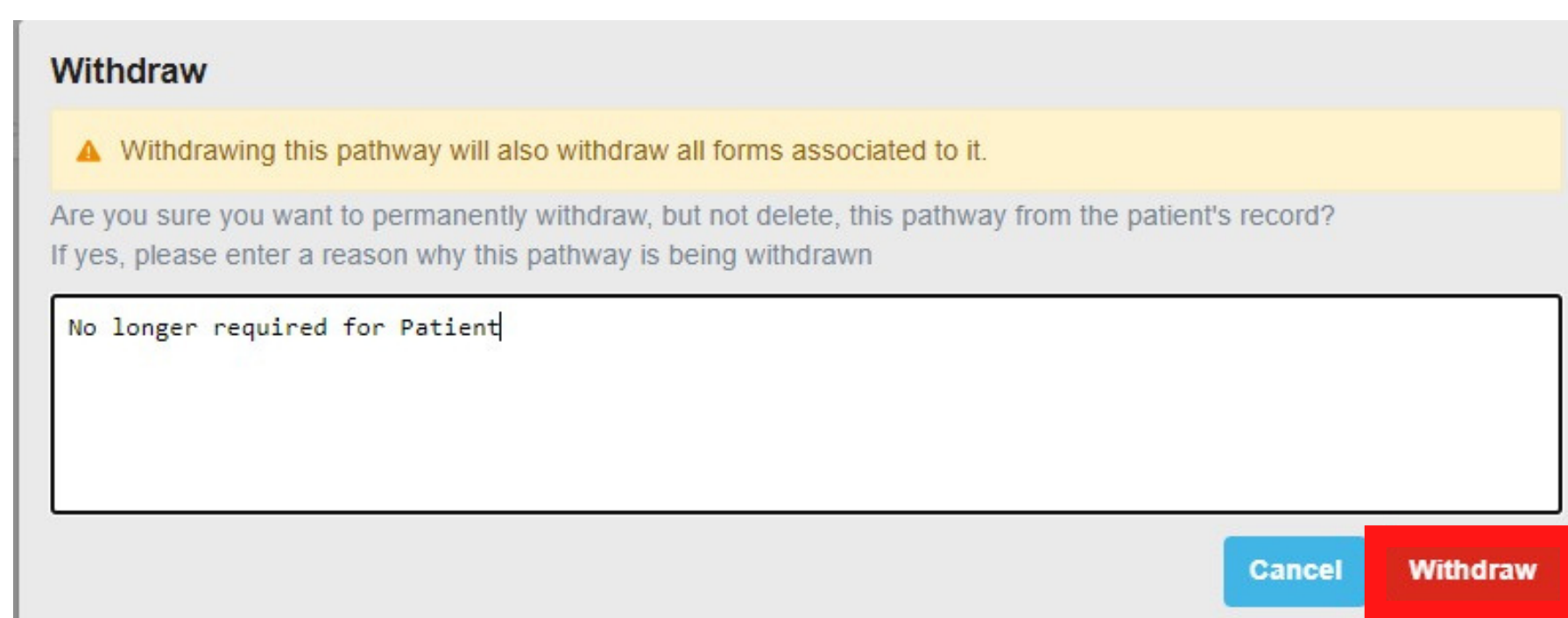
9

It is possible to **Withdraw** a completed **Assessment Record eForm**. Within the **Assessment Record Dashboard** for the associated **Assessment eForm**, click on the **Withdraw** button.

A red rectangular button with the word "Withdraw" in white text.

10

A window will pop up. Document the reason you are removing the **Assessment Record eForm** for the Patient and then click on **Withdrawn**. The **Assessment Record Dashboard** will then be displayed as below.

A modal dialog box titled "Withdraw". It contains a yellow warning banner with a triangle icon and the text "Withdrawing this pathway will also withdraw all forms associated to it." Below this is a question: "Are you sure you want to permanently withdraw, but not delete, this pathway from the patient's record? If yes, please enter a reason why this pathway is being withdrawn". There is a text input field containing "No longer required for Patient". At the bottom right are two buttons: "Cancel" (blue) and "Withdraw" (red).

Withdraw

⚠ Withdrawing this pathway will also withdraw all forms associated to it.

Are you sure you want to permanently withdraw, but not delete, this pathway from the patient's record?
If yes, please enter a reason why this pathway is being withdrawn

No longer required for Patient

Cancel Withdraw

The **Assessment Record Dashboard** will then appear like this.

The "Assessment Record Dashboard" interface. It has a header with "Assessment Record" and "Timeline" tabs, and a "Refresh" button. A blue notification bar at the top states "This assessment record has been withdrawn". The main content area is currently empty.

Assessment Record Timeline Refresh

This assessment record has been withdrawn

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 leedsth-tr.ImplementationTeam@nhs.net

Timeline

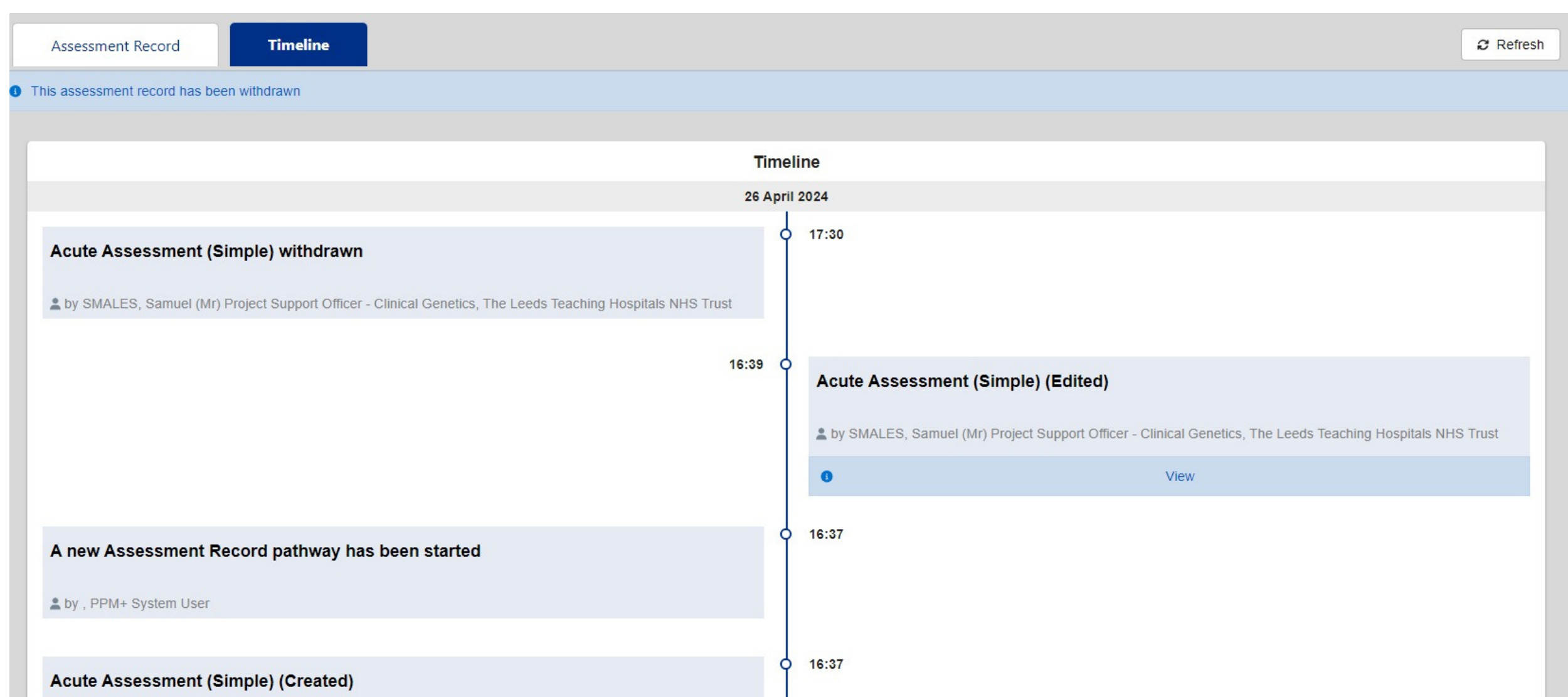
1

Click on the **Timeline** tab to view the **timeline** for the **Assessment Record's Dashboard**.



2

The **Timeline** will then open. Click on **View** (where applicable) to view the entry in **more detail**.



For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

Useful Contacts

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



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>

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