



# Consultation (Previously CNS Consultation)

USER GUIDE



**#LeedsDigitalWay**

CONNECTS • TRANSFORMS • IMPROVES



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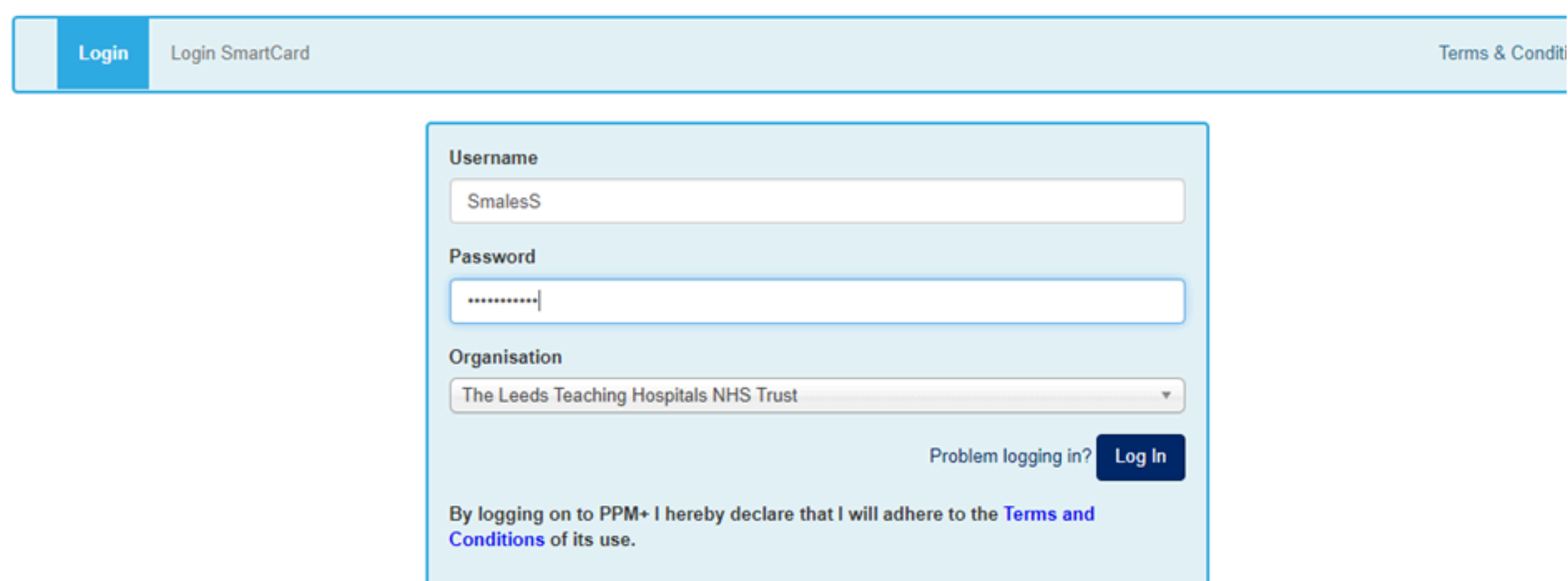
# Accessing PPM+ and navigating to a Patient's Single Patient View

1

To access PPM+ you will first need to navigate to this web link - <https://ppm2.leedsth.nhs.uk/>

2

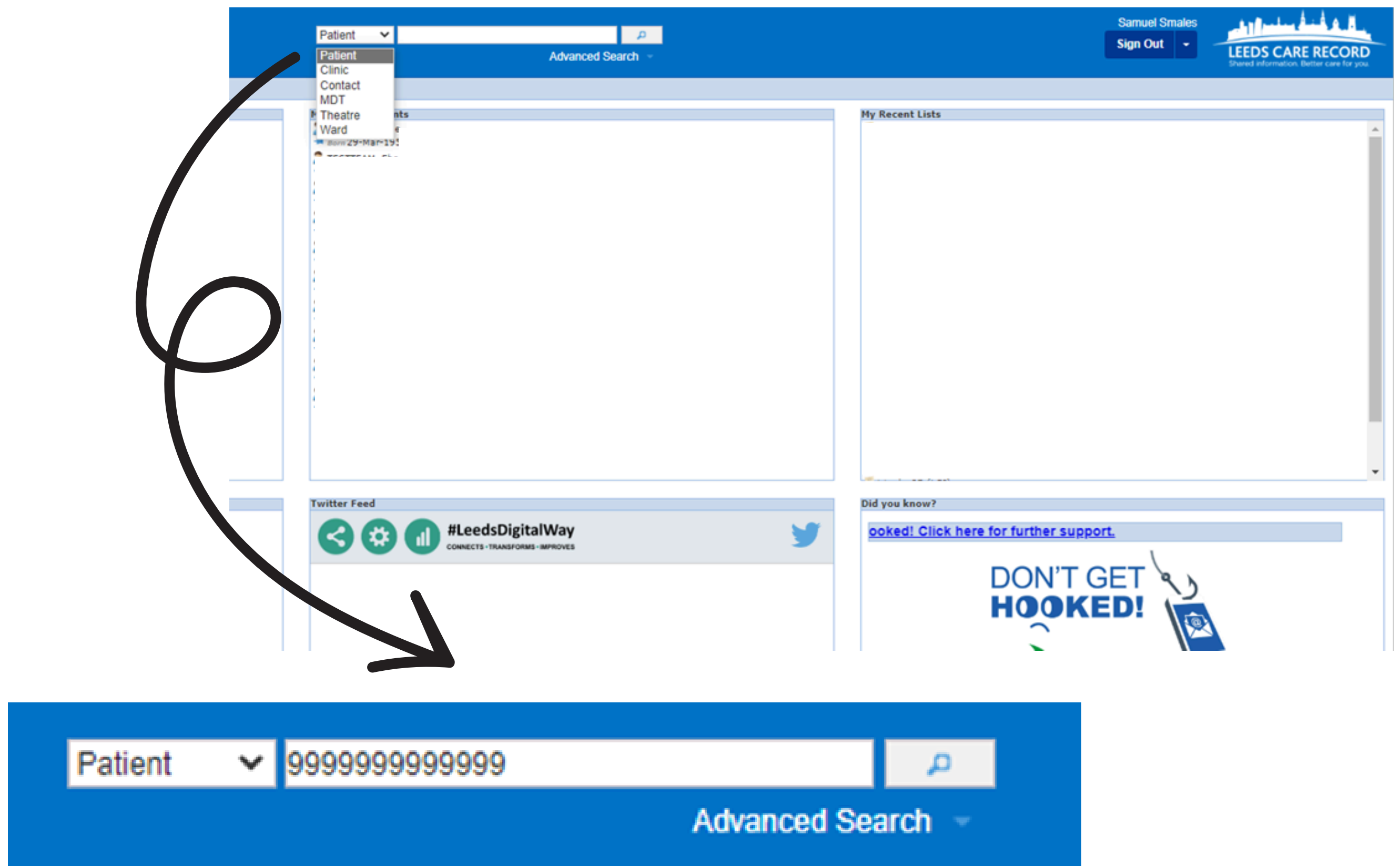
Log into *PPM+* with your usual *PPM1* or network username and password, select your organisation then click *Log In*.



The screenshot shows the PPM+ login page. At the top, there is a navigation bar with 'Login' (highlighted), 'Login SmartCard', and 'Terms & Conditions'. Below this is a central login form with the following fields: 'Username' (containing 'SmalesS'), 'Password' (masked with dots), and 'Organisation' (a dropdown menu showing 'The Leeds Teaching Hospitals NHS Trust'). To the right of the 'Organisation' dropdown is a link 'Problem logging in?' and a 'Log In' button. At the bottom of the form, there is a disclaimer: 'By logging on to PPM+ I hereby declare that I will adhere to the Terms and Conditions of its use.'

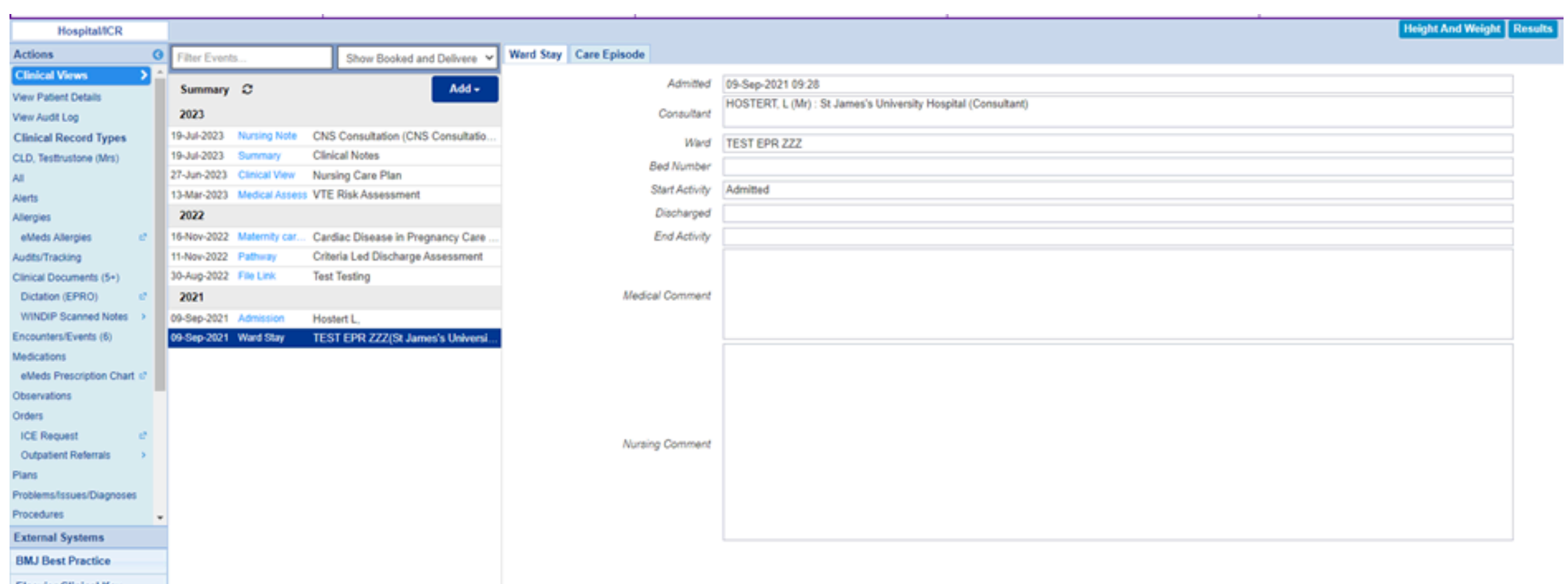
3

Search for the patient using their *NHS number* in the search bar at the top of the *PPM+ home page*.



4

This will navigate you to the *Patient's Single Patient View*.

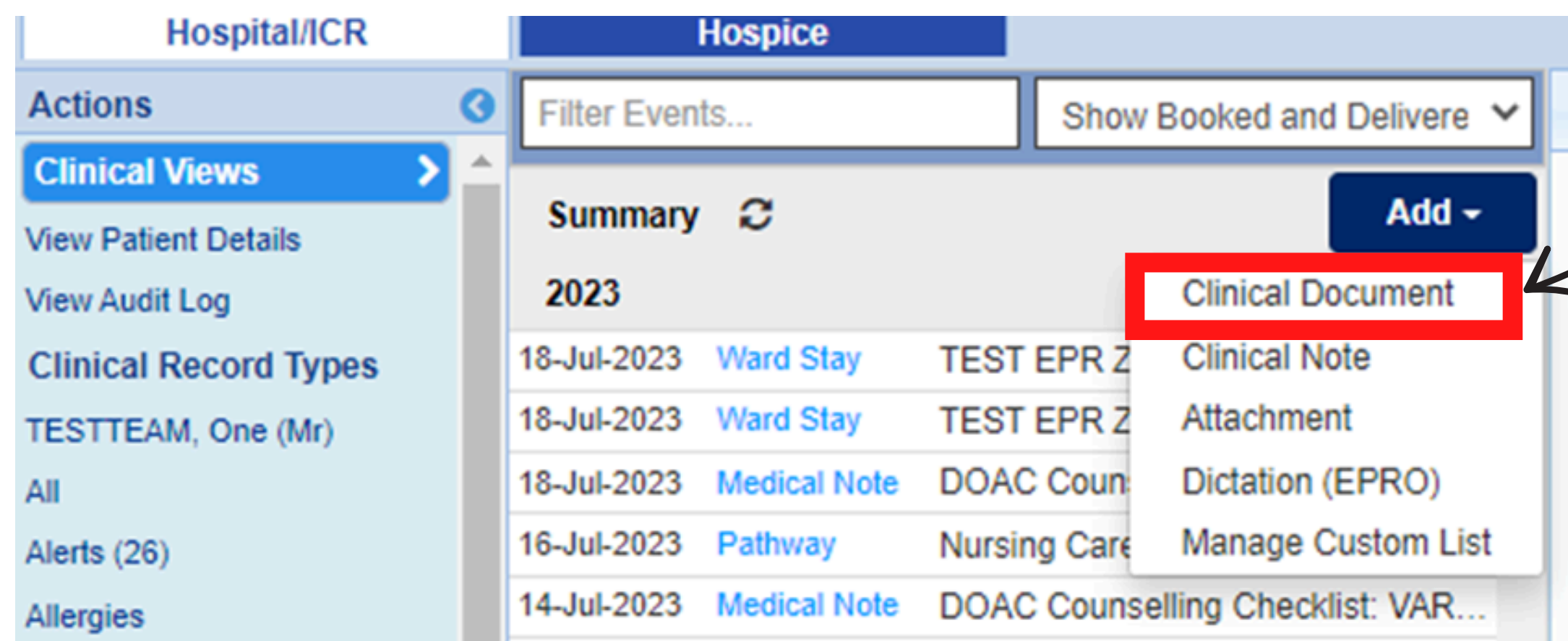


For further information on how to navigate to and use the *Single Patient View* in *PPM+*, please [Click Here](#).

# Adding a Clinical Document (Consultation eForm)

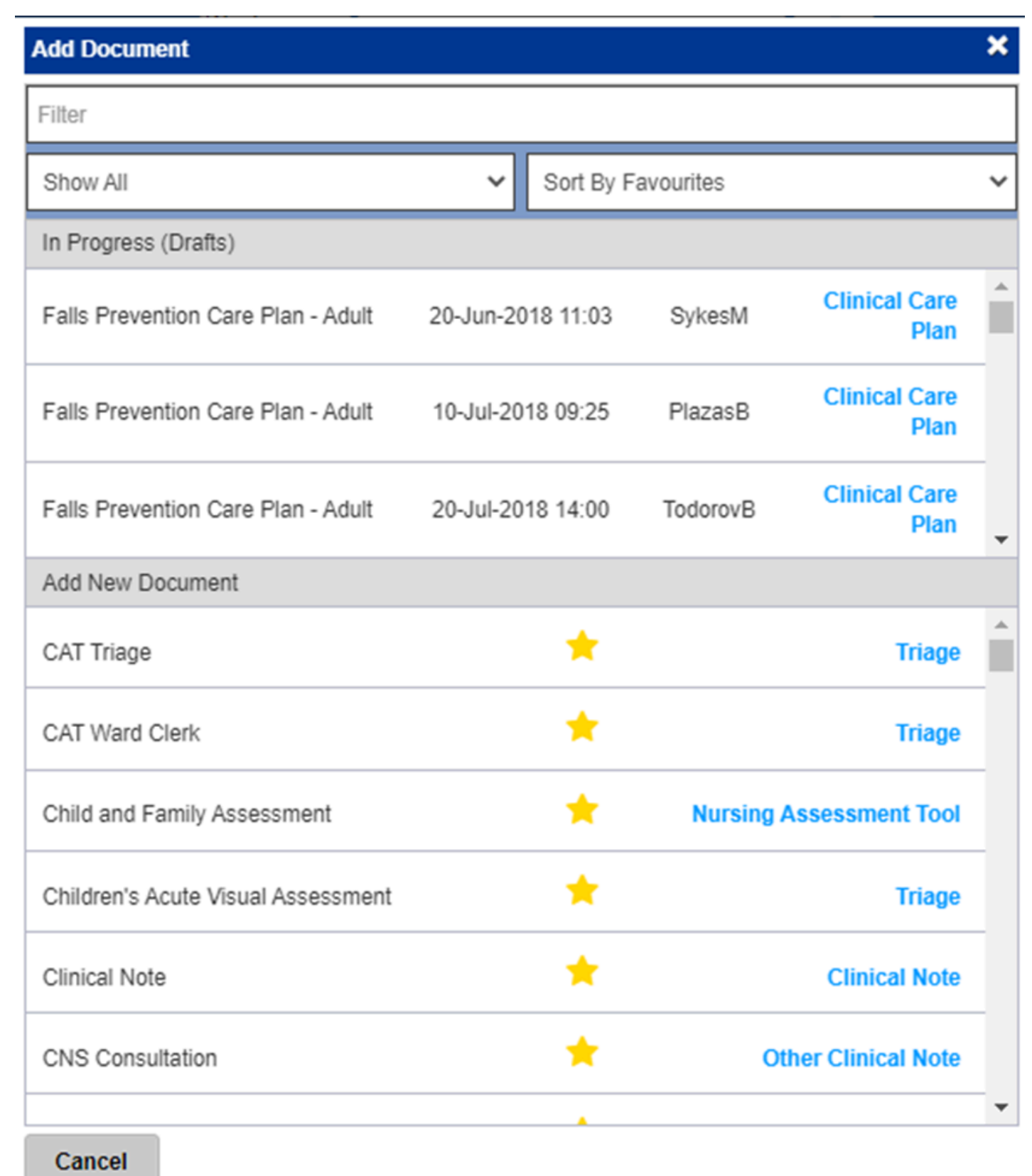
1

Click on the **Add** button in the *Patient's Single Patient View*. Then select **Clinical Document**.



2

This will navigate you to the **Add Document** window where you can view *In Progress (Drafts)* documents and **Add New Documents**.





6

3

Search for *Consultation* in the Filter field which will then populate the *Add New Document* section at the bottom.

You can set this document as a *favourite* so it always appears at the top of your Add New Document list by clicking on the *star*.

The screenshot shows the 'Add Document' modal with a search bar containing 'consultation'. Below the search bar are two dropdown menus: 'Show All' and 'Sort By Favourites'. The main area is titled 'In Progress (Drafts)' and contains a table with two rows: 'Consultation' and 'AHP Consultation'. The 'Consultation' row has a star icon and the label 'Clinical Document'. The 'AHP Consultation' row has a star icon and the label 'AHP Assessment'. A 'Cancel' button is at the bottom left.

4

Click the *Consultation* document to start adding a new document.

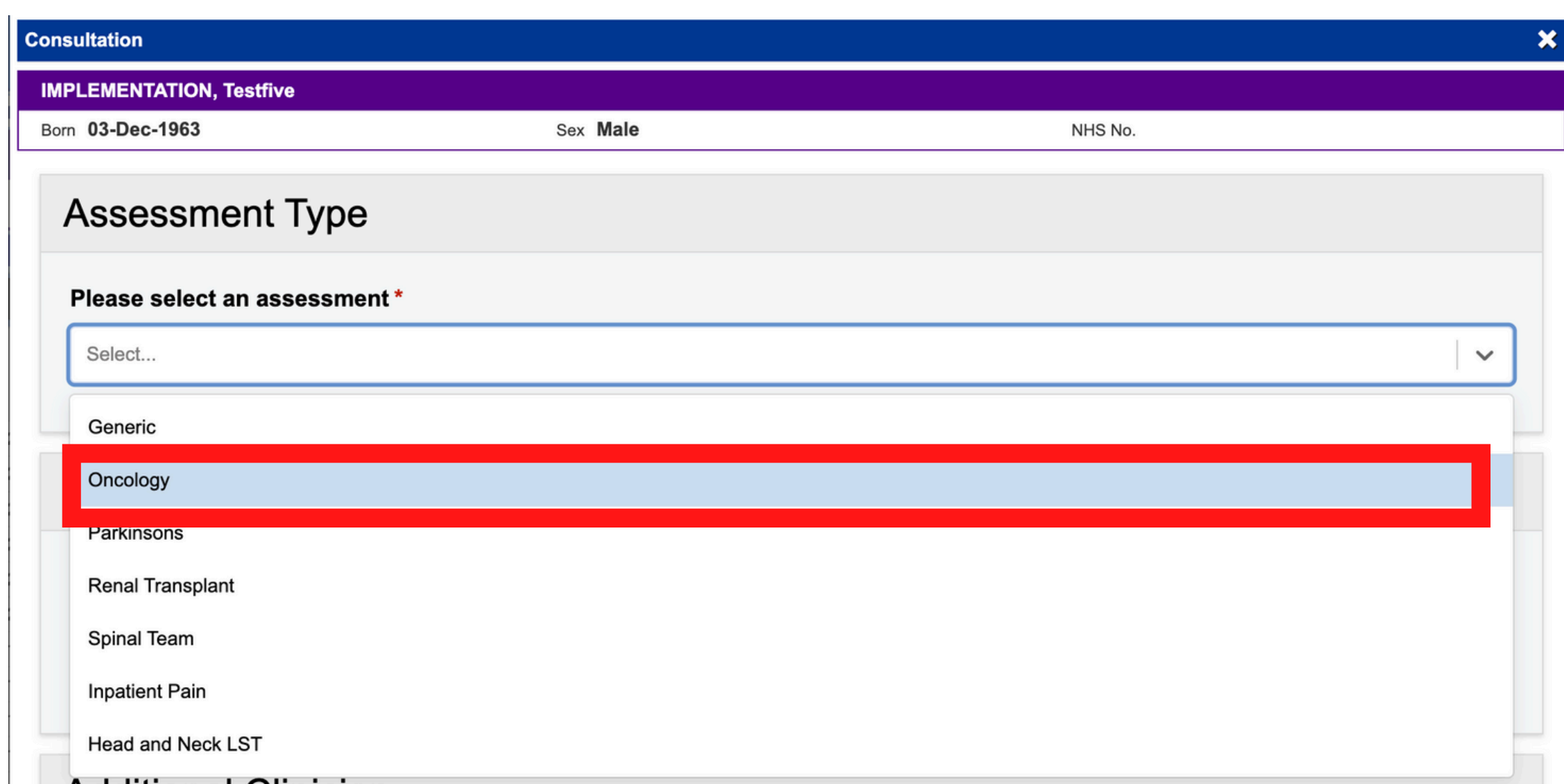
The screenshot shows the 'Add Document' modal with the search bar containing 'consultation'. The 'Consultation' document is now highlighted with a yellow star icon, indicating it is the selected document to start adding a new document.

For further information on how to add a *Clinical Document*, please [Click Here](#).

# Completing the Consultation eForm

1

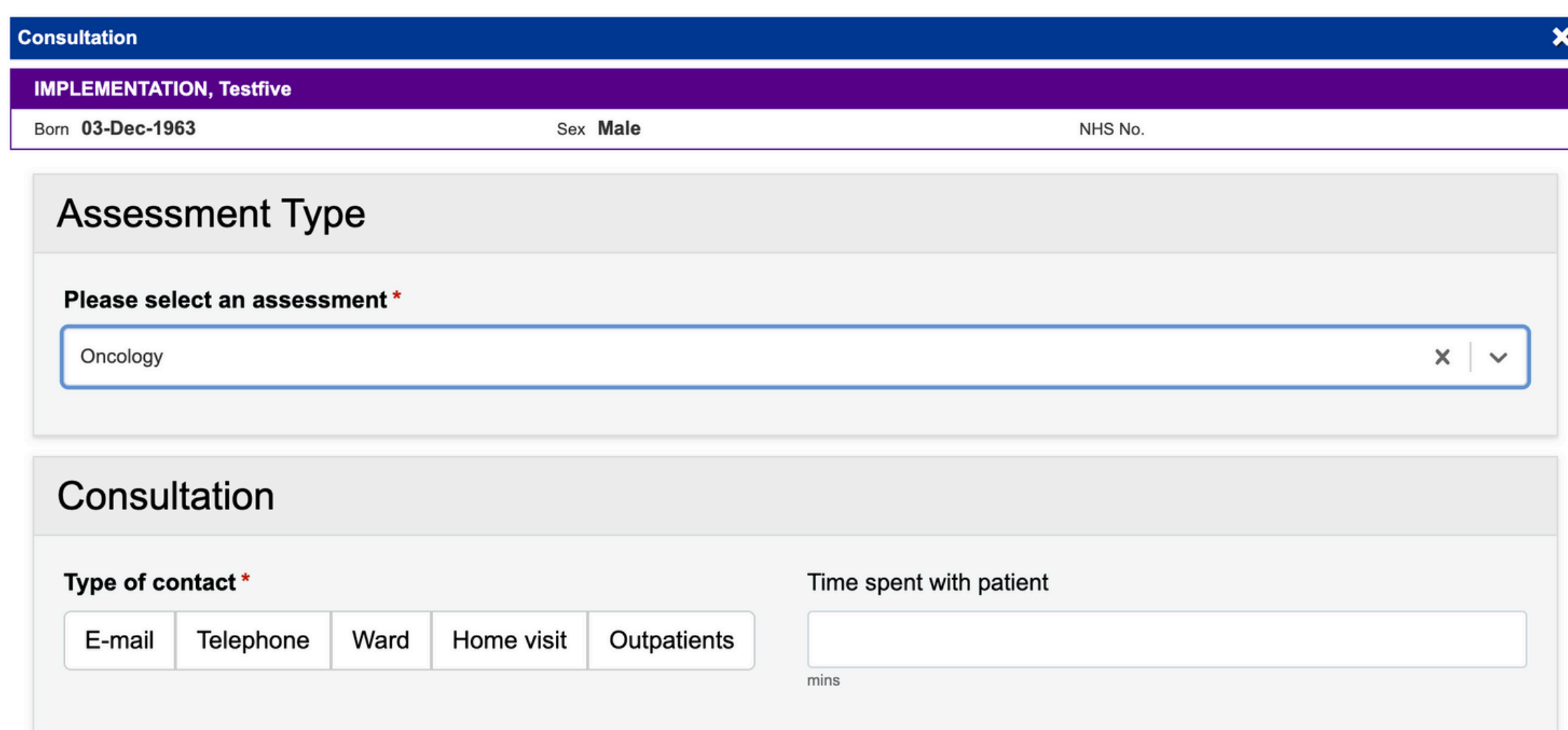
Select the *Assessment Type* from the drop down list. For your *Assessment type*, for this example, we will select *Oncology*. The following sections will be different depending on the *Assessment Type*.



The screenshot shows the 'Consultation' form with a purple header bar containing 'IMPLEMENTATION, Testfive'. Below this, patient details are listed: 'Born 03-Dec-1963', 'Sex Male', and 'NHS No.'. The 'Assessment Type' section is highlighted, showing a dropdown menu with the following options: Generic, Oncology (highlighted with a red box), Parkinsons, Renal Transplant, Spinal Team, Inpatient Pain, and Head and Neck LST. The dropdown is titled 'Please select an assessment \*'.

2

Select the *Type of contact* you have had with the patient and input time spent.



The screenshot shows the 'Consultation' form with the 'Assessment Type' dropdown menu now displaying 'Oncology'. Below this, the 'Consultation' section is highlighted, showing the 'Type of contact \*' field with buttons for 'E-mail', 'Telephone', 'Ward', 'Home visit', and 'Outpatients'. The 'Time spent with patient' field is also visible, with a 'mins' label below it.

3

Search for any *additional clinicians* involved in the assessment. You can add multiple clinicians by selecting the *Add button*.

The image shows two screenshots of the 'Additional Clinician' form. The top screenshot shows a search bar with 'tes' entered and a dropdown menu with options: 'A LETTER TEST - Surgery', 'A TEXT TEST', and 'ADAZ, Testone (Dr)'. The bottom screenshot shows the same form with a red box around the '+ Add' button. A large black arrow points from the dropdown menu in the top screenshot to the '+ Add' button in the bottom screenshot.

4

Fill out the details in the *Clinical Note*. This will generate a separate *Clinical Note* entry in the Patient's *Single Patient View*.

The image shows a screenshot of the 'Clinical Note' form. It includes fields for Author (MITTAL, Prachi (Ms)), Date of activity (24/03/2025), Time of activity (04:35 PM), Profession (Select...), Specialty (Select...), Type of note (General), Subject Line (0 / 200), and Notes (Rich text editor). The form is titled 'Clinical Note' and has a footer that says 'This entry will be added to the overall patient Clinical Note Summary'.

For further information on completing a *Clinical Note*, please [Click Here](#)



5

Select any symptoms from the *Symptom List*.

Symptom List

Symptom list

☐ None

☐ Abdominal

☐ Chest

☐ GI

☐ Gynaecological

☐ Haematological

☐ Head and Neck

☐ Neurological

☐ Psychological

☐ Skin

☐ Spinal

☐ Systemic

☐ Urinary

☐ Other

Selecting *Other* will prompt you to add any *Comments*.

Symptom List

Symptom list

☐ None

☐ Abdominal

☐ Chest

☐ GI

☐ Gynaecological

☐ Haematological

☐ Head and Neck

☐ Neurological

☐ Psychological

☐ Skin

☐ Spinal

☐ Systemic

☐ Urinary

☒ Other

Comments

6

Select any *Interventions* and who was present at diagnosis.

Interventions

<div>Interventions</div> <div><input type="checkbox"/> Co-ordination of planned admission</div> <div><input type="checkbox"/> Communication with other professionals</div> <div><input type="checkbox"/> Key worker details provided</div> <div><input type="checkbox"/> Medicines optimisation</div> <div><input type="checkbox"/> Non-medical prescription written</div> <div><input type="checkbox"/> Planning place of care</div> <div><input type="checkbox"/> Present at diagnosis</div> <div><input type="checkbox"/> Prevention of admission</div> <div><input type="checkbox"/> Record of consultation offered</div> <div><input type="checkbox"/> Smoking cessation advice</div>
--

7

Select any *Co-ordination/information/assessment for* and *Referral to other professions/agencies information*. Selecting Other will again prompt you to add any comments.

Co-ordination / information / assessment for

☐ Chemotherapy

☐ Diagnosis

☐ Follow up

☐ Investigations

☐ Pathway

☐ Radiotherapy

☐ Recurrence

☐ Supportive care

☐ Surgery

Referral to other professions / agencies

☐ District nursing team☐ PCT team☐ Psycho-oncology team☐ Social worker☐ Welfare rights team☒ Other

Comments

8

Select a Patient and Carer *Emotional Support Level* and add any comments if required.

Emotional Support

Patient

☐ Level 1

☐ Level 2

☐ Level 3

☐ Level 4

Carer

☐ Level 1

☐ Level 2

☐ Level 3

☐ Level 4

Comments

9

Enter any *Medication* information.

Medication

Is the patient steroid dependant?

Oral medication burden

☐ No

☐ Yes

☐ Unable to assess

Additional information

10

Finally click Submit to save the *Consultation* eForm.

Submit

# Viewing/Printing/Withdrawing the completed Consultation eForm

1

The completed *Consultation* will appear in the *Summary* list in the Patient's Single Patient View. You will also see the *Clinical Note* part of the Consultation eForm is visible to view separately in the *Summary View*.

HomeIMPLEMENTATION, Testfive

IMPLEMENTATION, Testfive

AddressPhoneGF

Hospital/ICRCommunity

Actions

Patient Summary

Clinical Views

Clinical Record Types

All

Alerts (2)

Filter Events...Show Booked and Delivered

Limited to 2000 recordsShow AllAdd

2025

24-Mar-2025Clinical Docu...Consultation: MITTAL, Prachi Ms - I...

24-Mar-2025SummaryClinical Notes

2

If you click into the*Consultation* eForm in the *Summary* list. You will notice, the completed eForm opens on the right hand side of the screen for you to view.

Community

Patient HistoryHeight And WeightResults

Filter Events...Show Booked and Delivered

External DocumentDetails

Limited to 2000 recordsShow AllAdd

ExpandPrintEditAudit TimelineWithdraw

Assessment Type

Please select an assessment

Generic

Consultation

Type of contactTime spent with patient

Telephone89

2025

24-Mar-2025Clinical Docu...Consultation: MITTAL, Prachi Ms - I...

24-Mar-2025SummaryClinical Notes

21-Mar-2025AHP AssesAHP Consultation: (Dietetics): Clinic...

21-Mar-2025AHP AssesAHP Consultation: (Dietetics): Clinic...

21-Mar-2025AHP AssesAHP Consultation: (Dietetics): Clinic...

21-Mar-2025AHP AssesAHP Consultation: (Dietetics): Clinic...

20-Mar-2025ReferralReferral: Requested - Psychology (...)

17-Mar-2025Self-AssessSpA - Peripheral PROMs: LONG, H...

17-Mar-2025Self-AssessSpA - Peripheral and Axial PROMs: ...

13-Mar-2025ReferralReferral: Discharged - Physio OUTP...

13-Mar-2025ReferralReferral: Requested - Speech & Lan...

13-Mar-2025ReferralReferral: Requested - Speech & Lan...

08-Mar-2025Clinical ViewNursing Care Plan

04-Mar-2025PrescriptionAcute Haemodialysis Prescription: S...

3 Click on the *Expand* button to view the completed eForm in a larger format via a pop out window.

Expand

Consultation: MITTAL, Prachi Ms - Intern Project Support Officer

IMPLEMENTATION, Testfive

Item 03-Dec-1963 Sex Male NHS No.

Assessment Type

Please select an assessment  
Generic

Consultation

Type of contact  
Telephone

Time spent with patient  
89

Additional Clinician

Additional Clinician  
ACCOUNT, Test Counter (Dr) Consultant The Leeds Teaching Hospitals NHS Trust

4 Click on the *Print* button to print out the completed eForm. When you click on the button it will open the completed eForm in a separate window in a PDF format. The completed eForm can be easily printed from this view.

Print

Consultation

IMPLEMENTATION, Testfive Born 3-Dec-1963 Gender Male  
NHS number PAS number 0037947

Address

Assessment Type

Please select an assessment  
Generic

Consultation

Type of contact  
Telephone

Time spent with patient  
89

Additional Clinician

Additional Clinician  
ACCOUNT, Test Counter (Dr) Consultant The Leeds Teaching Hospitals NHS Trust

Please consider amending the subject line in the clinical note below to include the assessment type selected above

Clinical Note

Author  
MITTAL, Prachi (Ms)

Date of activity  
24-Mar-2025

Time of activity  
16:40

Profession  
Case Manager

Specialty  
Accident and Emergency

Type of note  
General

5 Click on the *Withdraw* button to withdraw the document. When you click on the *Withdraw* button a pop up window will appear, you will need to document the reason you are withdrawing the document. Then, you need to click *Withdraw*.

Withdraw

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


Cancel Withdraw



6

consultation

Show All

Limited to 2000 records Show All 

Add ▾

2025

24-Mar-2025 Clinical Docu... Consultation: MITTAL, Prachi Ms - I...

When in the Patient's *Single Patient View*, you can search in the *Summary* list for the eForm or document you need to find. Simply type in the search box the name of the eForm or document and make sure the filter is set to *Show All*.

# Viewing the Clinical Note part of the Consultation eForm

1

The screenshot shows a web application interface for viewing a clinical note. On the left, a 'Summary' list is visible, with a red box highlighting the 'Clinical Notes' entry for 09-Jul-2023. The main area displays the 'Assessment Type' (Oncology), 'CNS Consultation' (Telephone), and 'Additional Clinician' fields.

When you have completed the *Consultation eForm*, you will notice there is a separate *Clinical Note* entry in the Summary list been created from the information you inputted within *Clinical Note* section in *the Consultation eForm*. Click on *Clinical Note* within the *Summary* list.

2

The screenshot shows a table titled 'Clinical Notes: Table'. The table has columns for 'Notes' and 'Type: General'. The entry for MITTAL, Prachi (Ms) is expanded, showing details like 'Subject: k' and 'Images attached?: No'.

When you click on the *Clinical Note* in the *Summary* list, it will open on the right hand side of the screen in a table format. Please [Click Here](#), to learn more about *Clinical Note*.

# Additional eForms

There are *3 additional eForms* that can be completed following the completion of the *Consultation eForm*. They are the *Holistic Needs Assessment eForm*, *Holistic Needs Assessment - Care Plan eForm*, and the *NCSI Concerns Checklist eForm*.

These *eForms* are added in the same method as shown previously in this guide on Page 5 (*Adding a Clinical Document - Consultation eForm*). [Click Here](#) for further information.

## Holistic Needs Assessment eForm

Holistic Needs Assessment

CLD, Testrstone (Mrs)

Born01-Jan-1990 (33y)GenderFemaleNHS number

AddressSt. James's Universi, Beckett Street, Leeds, , LS9 7TFPAS number0034515

Background

What Matters

Concerns Checklist

Contact Details

Patient preferred name \*

Contact details \*

Background

Stage HNA completed \*

Current situation \*

Sharing info \*

Person completing HNA \*

Discard

Save Draft

Submit

## NCSI Concerns Checklist eForm

NCSI Concerns Checklist

CLD, Testrstone (Mrs)

Born01-Jan-1990 (33y)GenderFemaleNHS number

AddressSt. James's Universi, Beckett Street, Leeds, , LS9 7TFPAS number0034515

Concerns checklist

This self-assessment is optional, however it will help us understand the concerns and feelings you have. It will also help us identify any information and support you may require in the future.  
If any of the problems below have caused you concern in the past week and if you wish to discuss them with a health care professional, please tick the box. Leave the box blank if it doesn't apply to you or you don't want to discuss it now.

I have questions about my diagnosis/treatment that I would like to discuss

No

Yes

Physical concerns

☐ Breathing difficulties

☐ Passing urine

☐ Constipation

☐ Diarrhoea

☐ Eating or appetite

☐ Indigestion

☐ Sore or dry mouth

☐ Nausea or vomiting

☐ Sleep problems/nightmares

Discard

Submit

## Holistic Needs Assessment - Care Plan eForm

Holistic Needs Assessment - Care Plan

CLD, Testrstone (Mrs)

Born01-Jan-1990 (33y)GenderFemaleNHS number

AddressSt. James's Universi, Beckett Street, Leeds, , LS9 7TFPAS number0034515

Care plan

Person completing care plan \*

Date completed \*

What Matters To Me

What is important to me?

How can you best support me?

Care plan

Concern \*

Outcome \*

Action \*

Discard

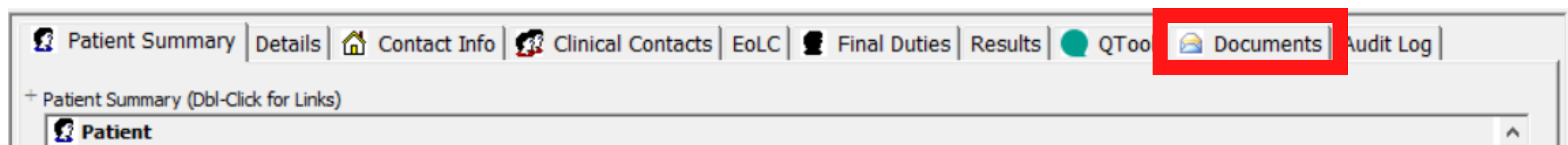
Save Draft

Submit

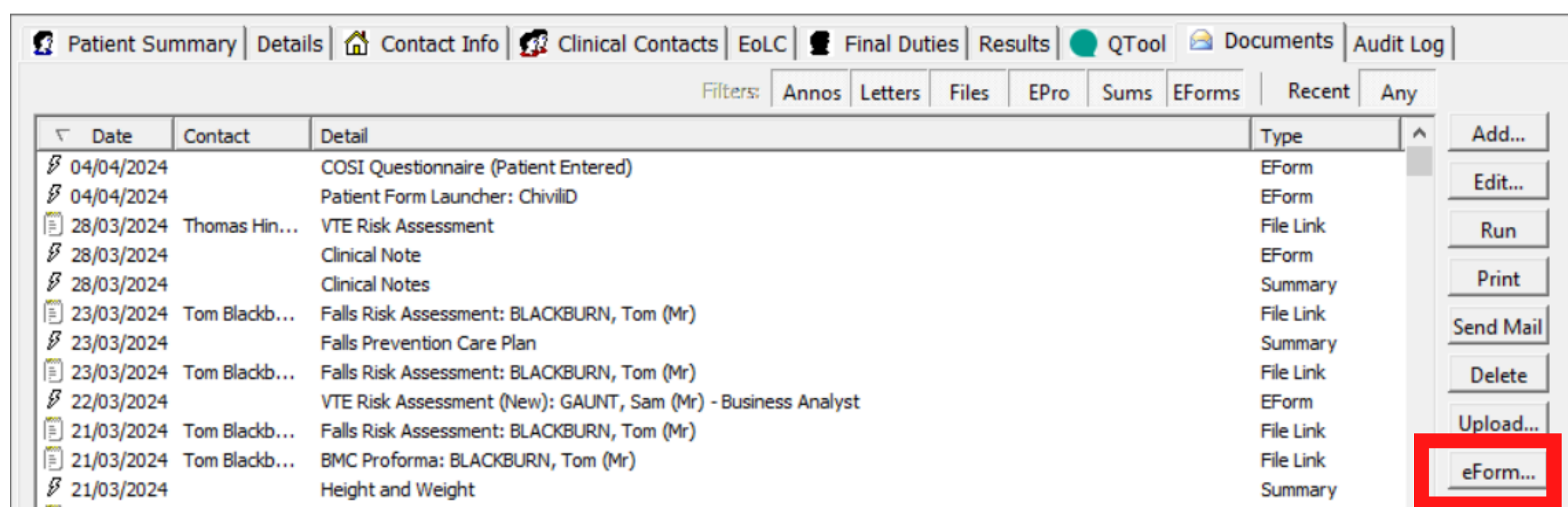
# Completing the Consultation eForm via PPM1

You will also have the ability to complete the PPM+ Consultation eForm and additional eForms via the patient record in PPM1.

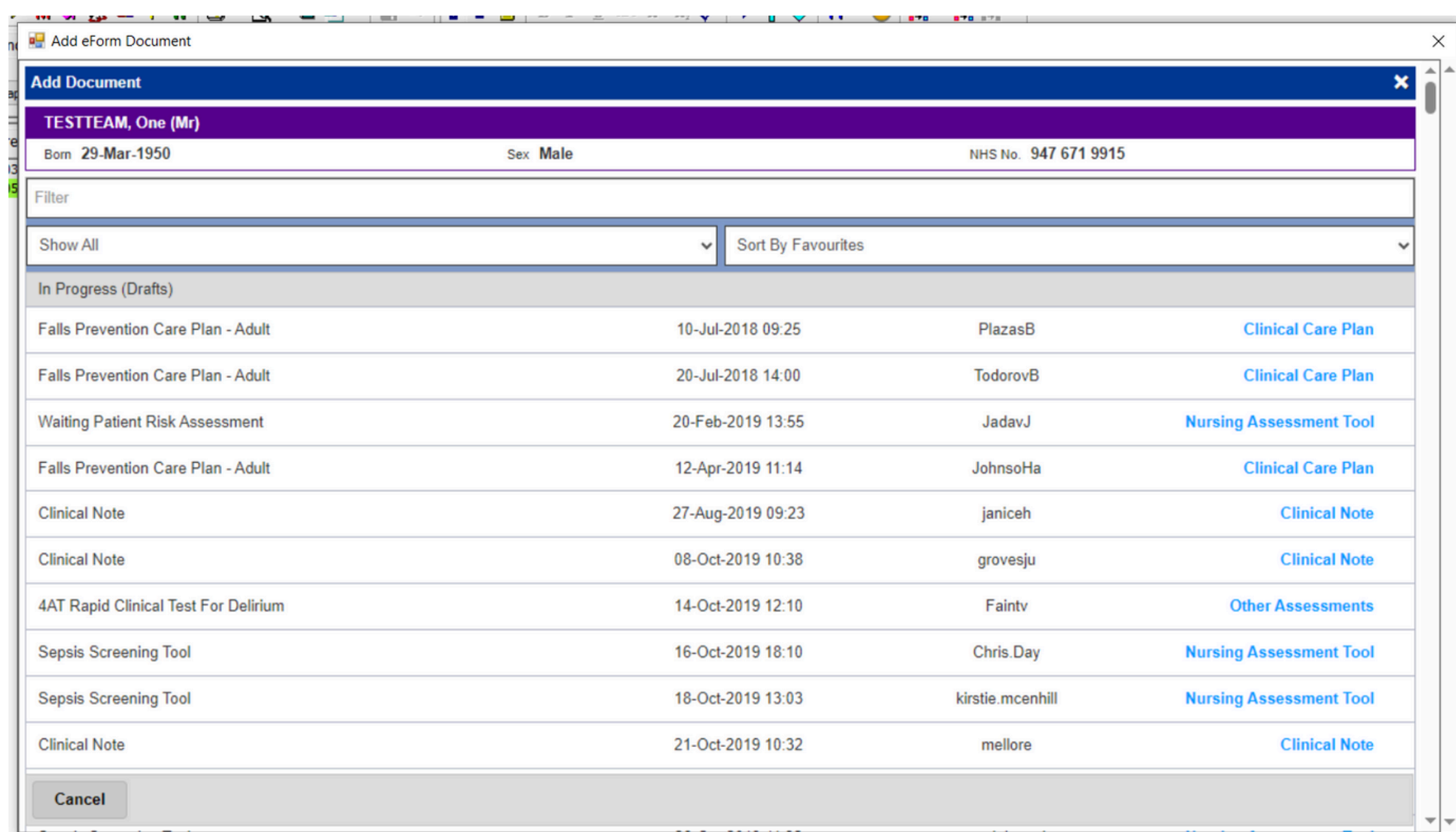
- 1 Log into PPM1 and retrieve your patient. In the patient's record select 'Documents'.



- 2 Select eForm in the right hand side menu.

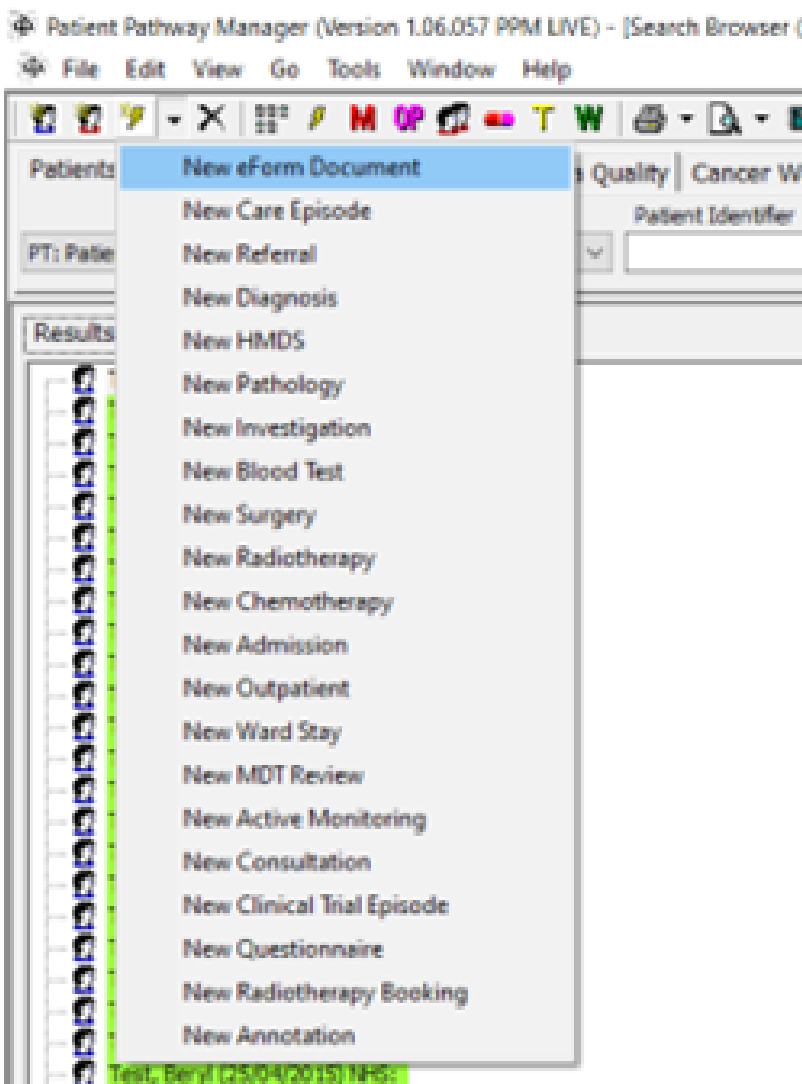
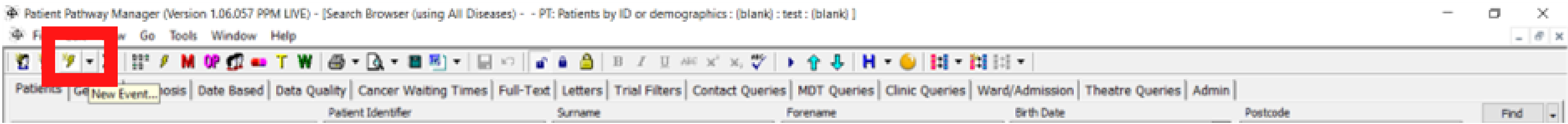


- 3 This will navigate you to the PPM+ Add Document window. Where you can add the relevant eForms in the same method as shown previously in this guide on Page 5 (Adding a Clinical Document - Consultation eForm).





**4** You can also add the eForm via the top tool bar once you have retrieved your patient.



This will navigate you to the PPM+ Add Document window. Where you can add the relevant eForms in the same method as shown previously in this guide on Page 5 (Adding a Clinical Document - Consultation eForm).



# 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](mailto:informaticsservicedesk.lth@nhs.net) or 0113 3926655.



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