

ppm+

Clinical Note (Including the New Dashboard View)

USER GUIDE



#LeedsDigitalWay

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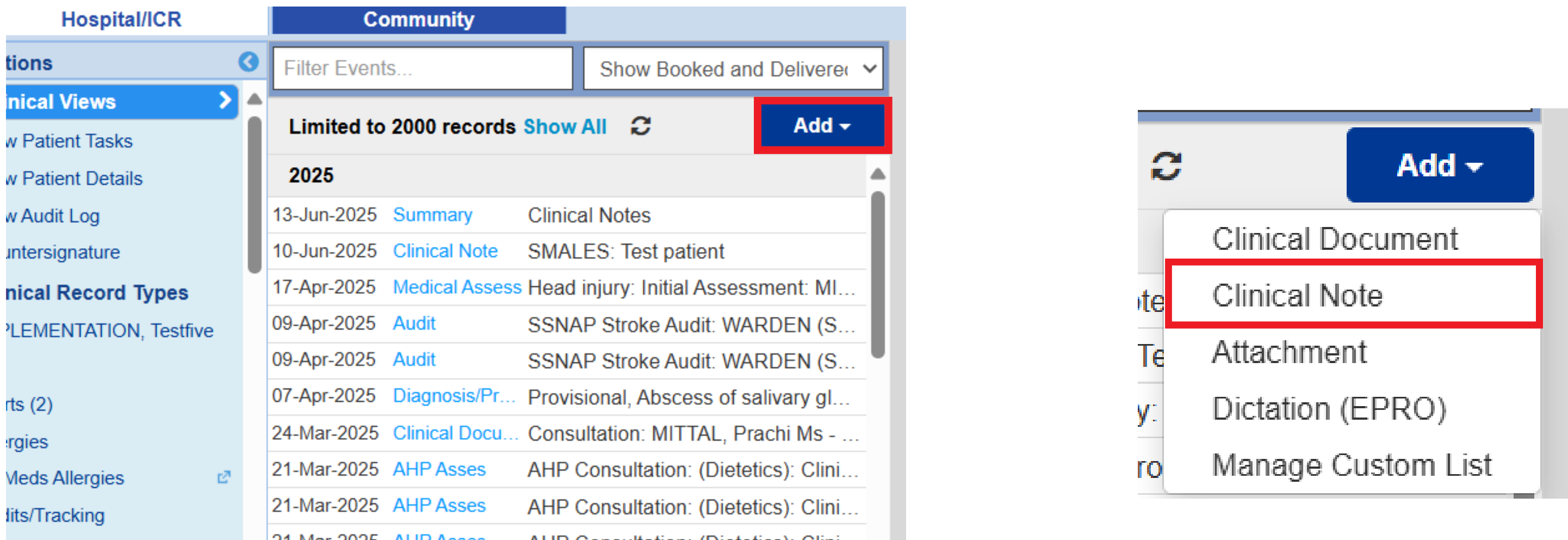
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For further information please contact:

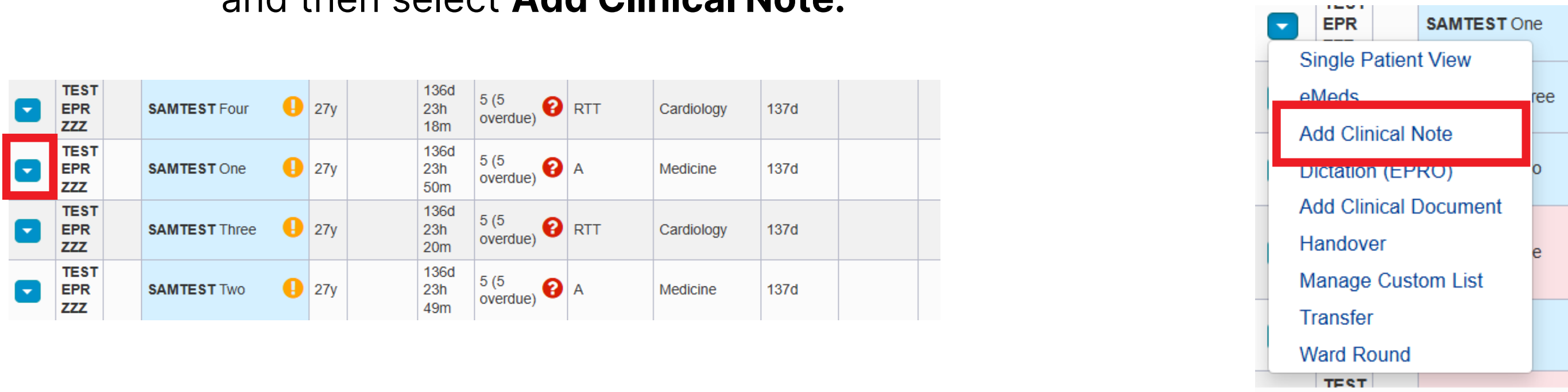
✉ leedsth-tr.ImplementationTeam@nhs.net

Navigating to the Clinical Note eForm

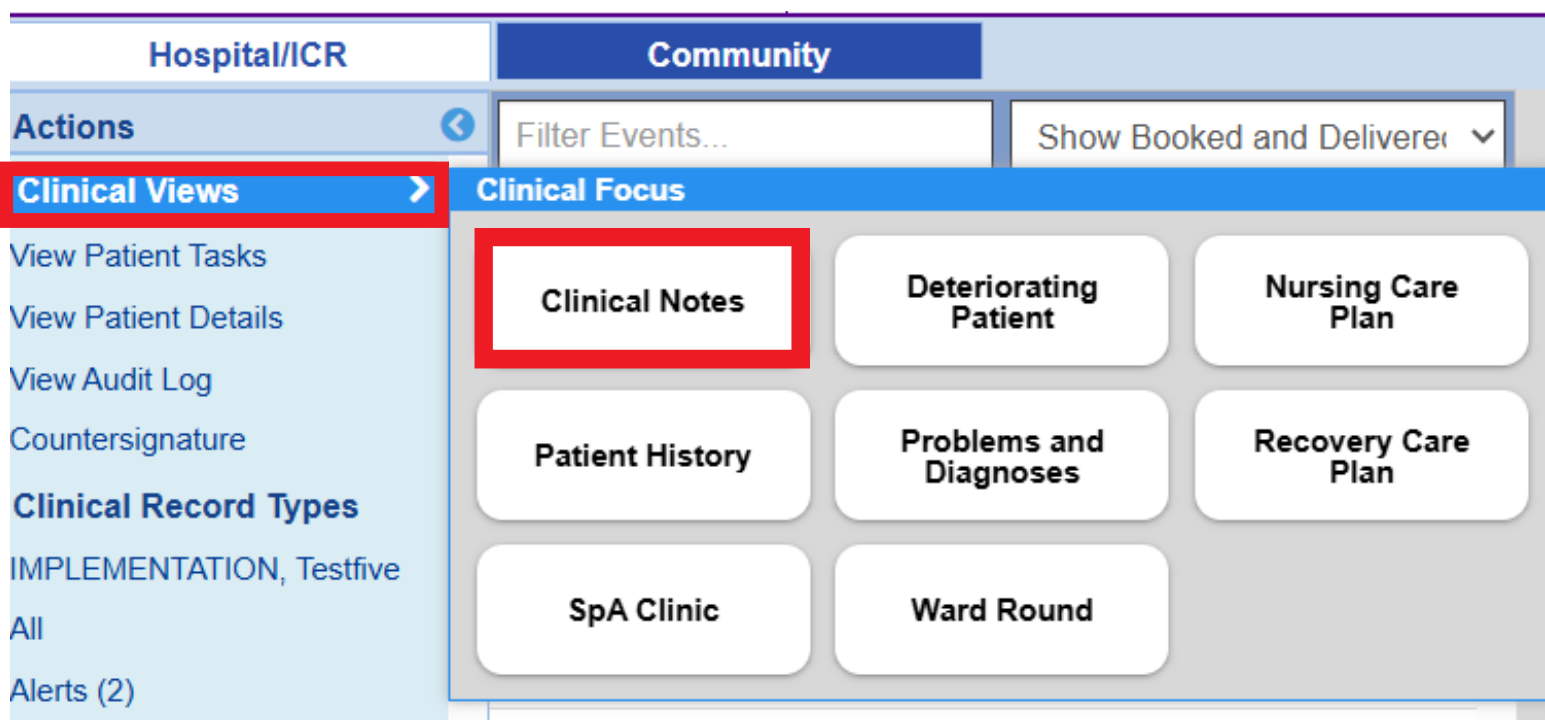
- 1** You can add a **Clinical Note** via the **Patient's Single Patient View**, click on the **Add** button and select **Clinical Note**.



- 2** You can also add a **Clinical Note** from the **Multi Patient View** for your **Clinical Area**. Click on the **blue square arrow/drop down** for your Patient and then select **Add Clinical Note**.



- 3** You can also add a **Clinical Note** via the **Clinical Notes Dashboard**. Click on **Clinical Views** in the **Patient's Single Patient View** and then click on **Clinical Notes**.



For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net

4

Then click on the **+Add Note button** to navigate to the **Clinical Note eForm**.

+ Add Note

5

Also, you can **Add a Clinical Note** via the **Clinical Notes Summary Table** by clicking on the **Add New Document button**.

Add New Document

When you add or update a **Clinical Note** from any of these locations, the changes are automatically reflected across all **summary views**. This ensures that the **most up to date** information is always available, regardless of where it was entered.

It is possible to add a Clinical Note via the PPM+ Mobile App. This can be done via the eForms section on the Mobile App. Please visit the PPM+ Mobile page on the PPM+ Help Site to learn how to do this by [Clicking Here](#).

For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

Completing the Clinical Note eForm

1

When the **Clinical Note eForm** opens. It will automatically populate the **Author** section with your name. **This can not be changed.**

Clinical Note

Author: SMALES, Samuel (Mr)

Date of activity *: 13/06/2025 (13-Jun-2025)

Time of activity *: 14:42 (Format HH:mm)

Profession *: Select...

Specialty *: Clinical Genetics

Type of note *: General

Subject Line *: 0 / 200

2

The **Speciality section** will be pre-populated with your **Speciality** from your **PPM+ Contact**. Please make sure **PPM+ Contact** has been set up and is up to date. Please see the **Contacts page** on the **PPM+ Help Site** for further information by [Clicking Here](#).

Clinical Note

Author: SMALES, Samuel (Mr)

Date of activity *: 13/06/2025 (13-Jun-2025)

Time of activity *: 14:42 (Format HH:mm)

Profession *: Select...

Specialty *: Clinical Genetics

Type of note *: General

Subject Line *: 0 / 200

3

If you need to update the **Speciality** in the proposed **Clinical Note**, click on the **X** icon in the section and then click on the **drop down arrow** and select your **Speciality** from the available options.

Specialty *

Clinical Genetics

Specialty *

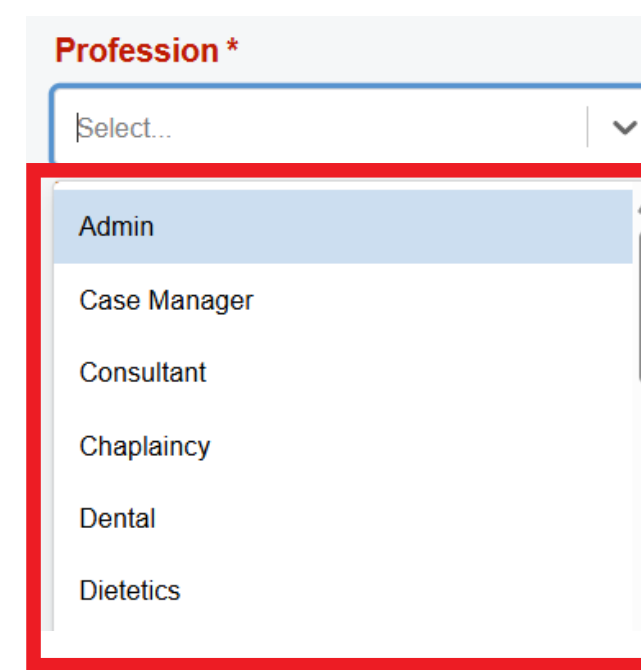
Select...

- All
- Accident and Emergency
- Acute Internal Medicine
- Addiction Services
- Adult Cystic Fibrosis
- Allergy
- Allied Health Professional
- Anaesthetics

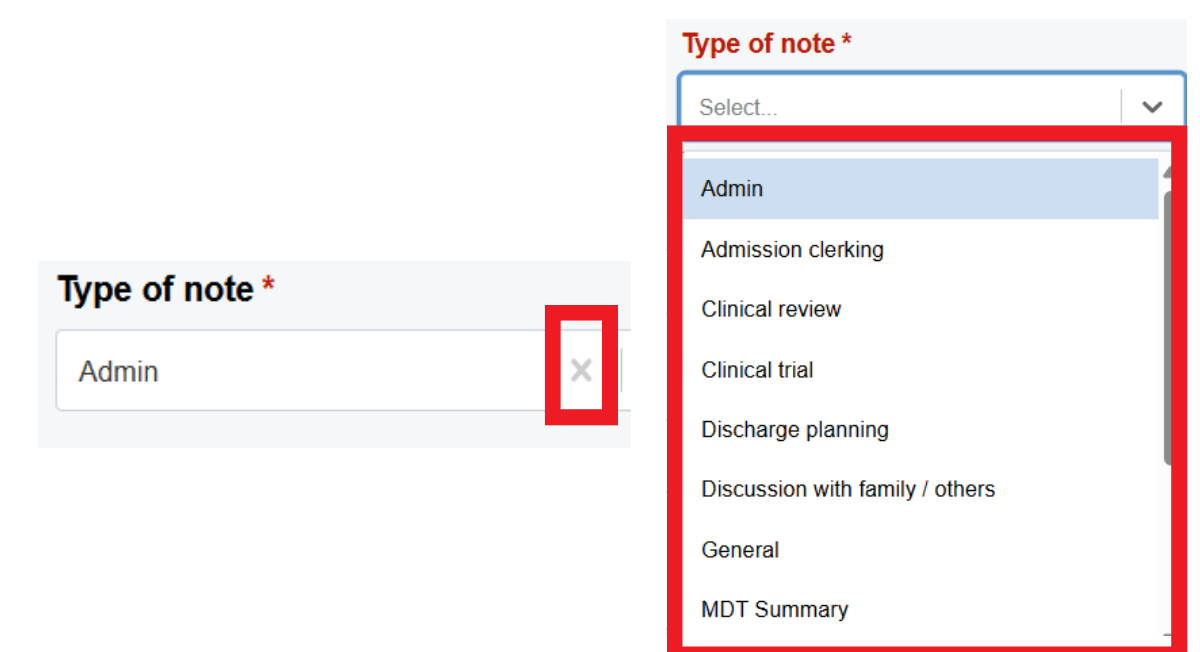
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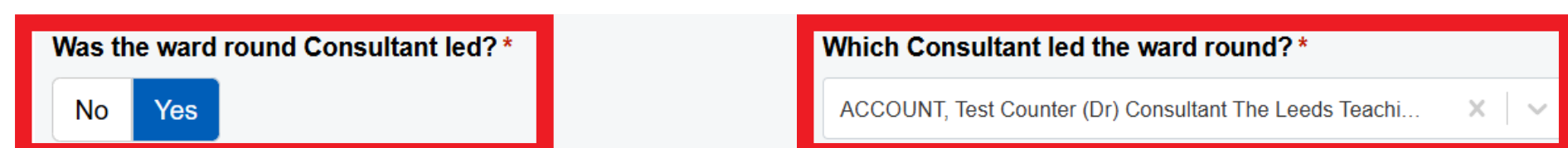
- 4 Select your **Profession** from the drop down arrow.



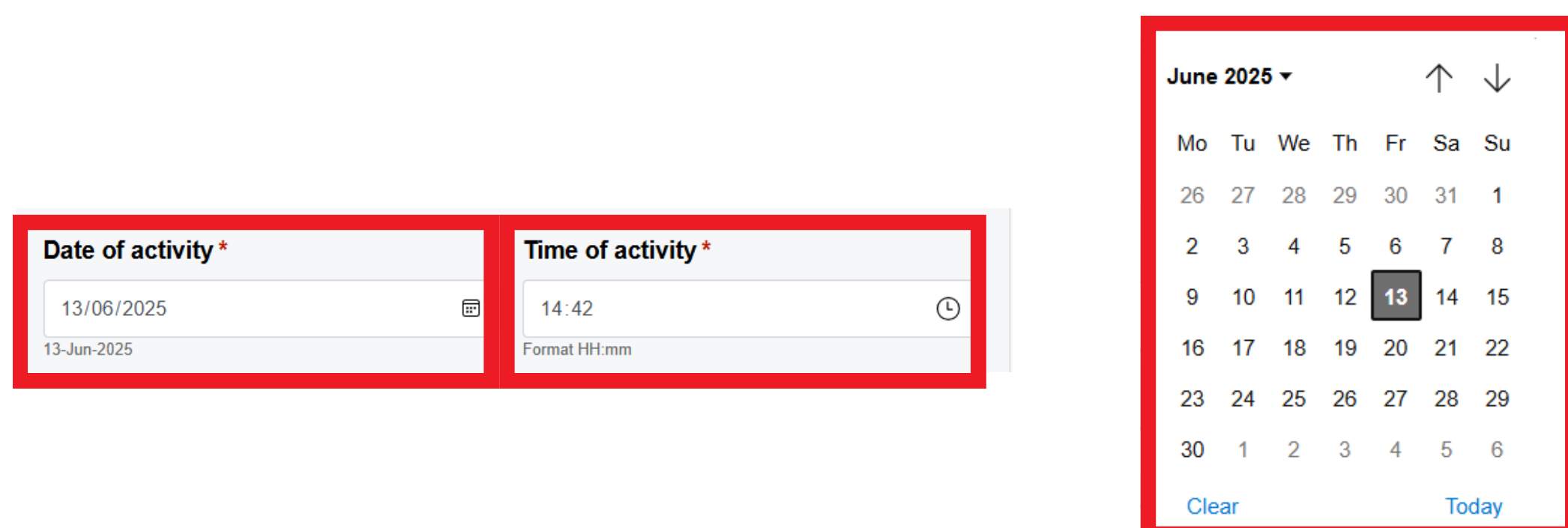
- 5 Next, select the **Type of Note** you are completing. If needed, click on the **X** icon to remove the already entered **Clinical Note Type**, if incorrect. Then, Click on the **down drop** and select the **Type of Note** from the available options.



- 6 Please note, if you select **Ward Round**, you can specify if the **Ward Round was Consultant led**. If yes, you can search for the Consultant who led the **ward round**. The **Consultant** will need to have set up their **PPM+ contact** to be findable. Please see the Contacts page on the **PPM+ Help Site** for further information by [Clicking Here](#).



- 7 The **Date and Time of activity** will automatically populate with the **current Date and Time**. It is possible to back date the **Date and/or Time** by clicking on the **icon** within the **corresponding field** and select from the **relevant pop up menu**. Please see the example below:



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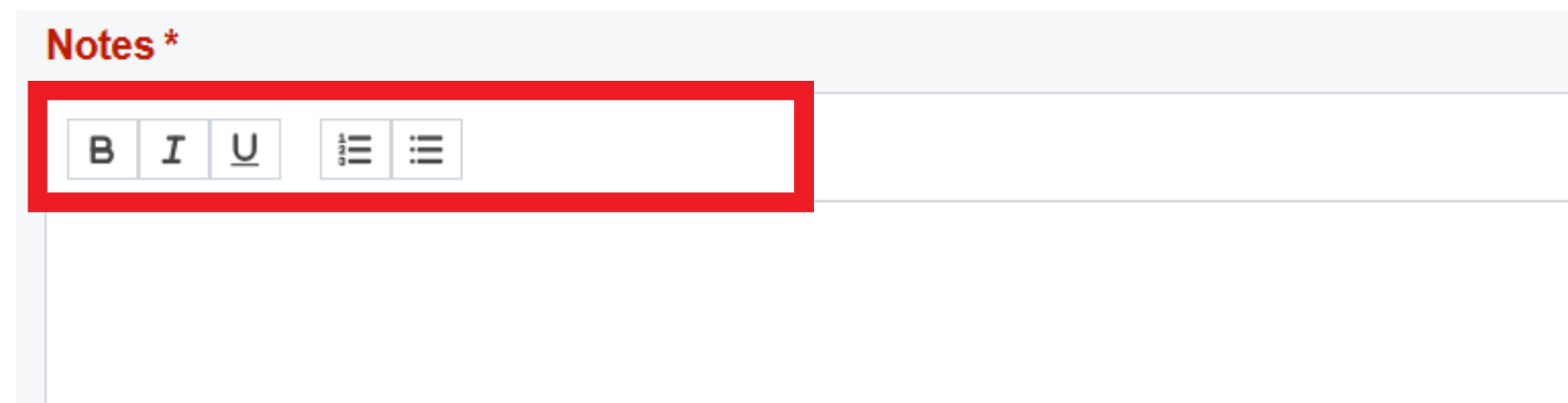
8

You need to enter a **Subject Line** for your **Clinical Note** within this section.

Subject Line *

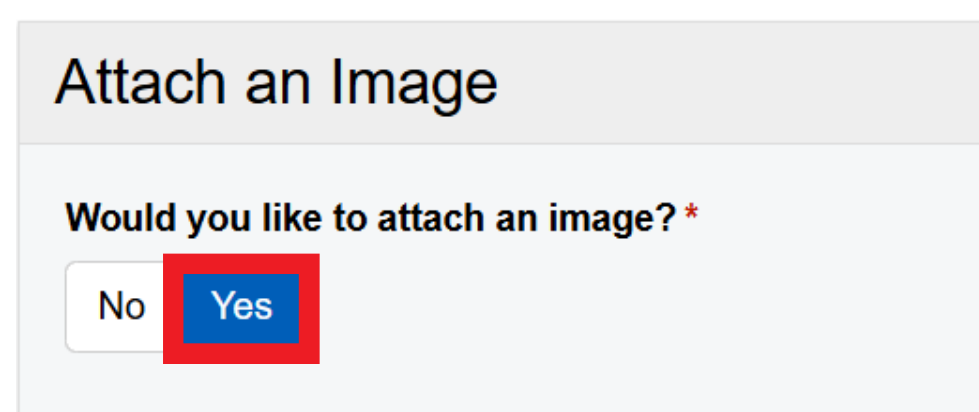
9

Enter the text for your **Clinical Note** in the **Notes** section. **Use the Tools** available to help structure the content of your **Clinical Note**.



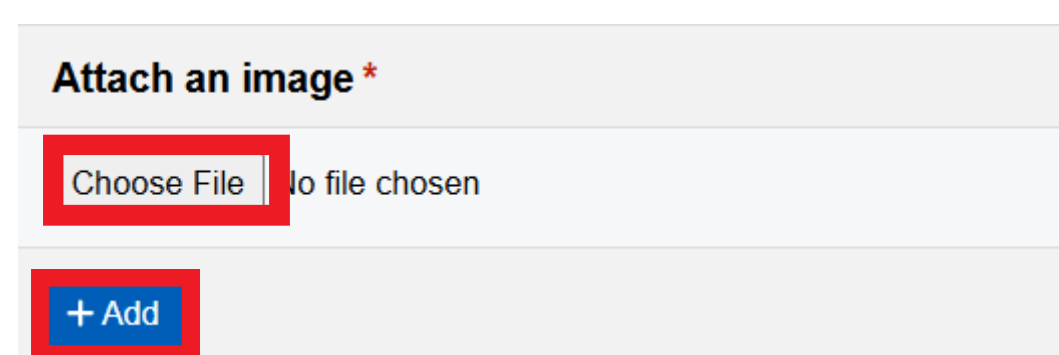
10

It is also possible to **attach an image** to an **Clinical Note**.



11

Click on **Choose File** and **attach an image** via your computers saved files. You can add **up to four images** in total by clicking on the **+Add button**. Once you have submitted the **Clinical Note**, please **delete** the **image** or **images** from your **device** and any **other potential saved locations**.



For Clinical Notes, it is strongly recommended to attach images using the PPM+ Mobile app. This method is preferred as it reduces the risk of information governance issues, particularly around image confidentiality. Images taken through the mobile app are captured in real-time and are not stored on the iPad. [Click Here](#) for further information.

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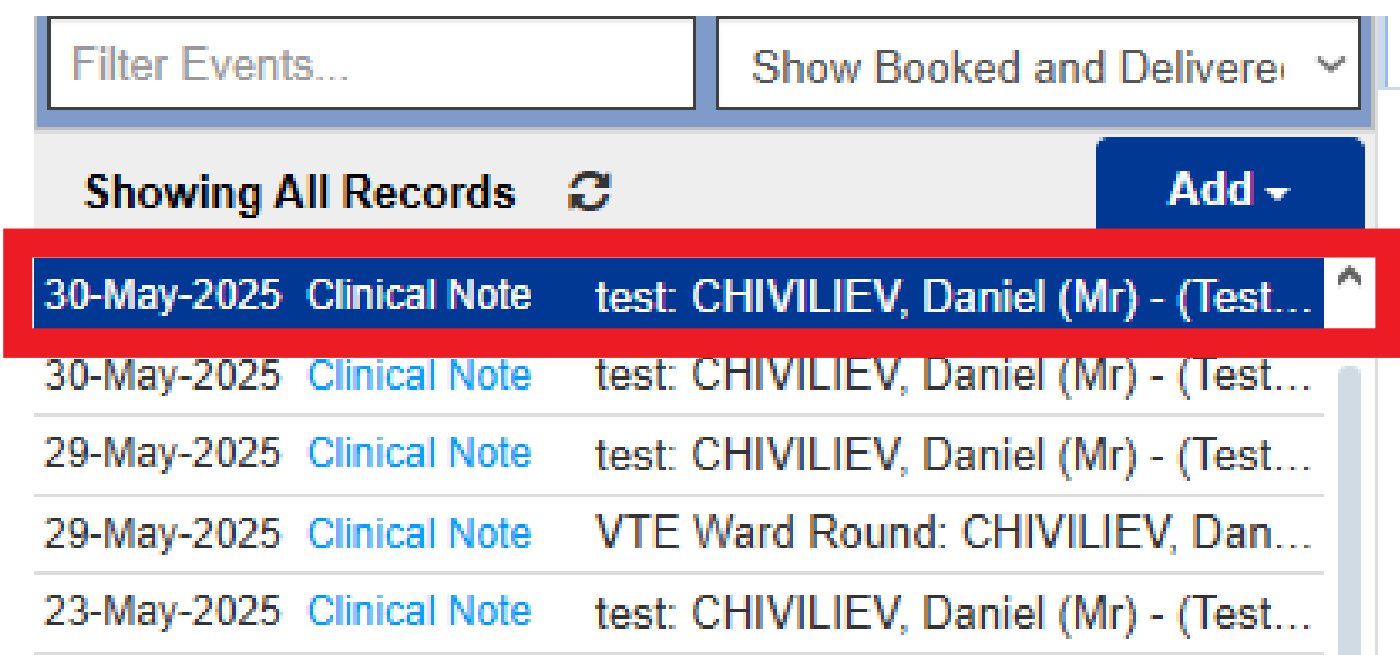
Click on the **Submit button**, when you have finished.



Viewing, Editing and Withdrawing a Clinical Note

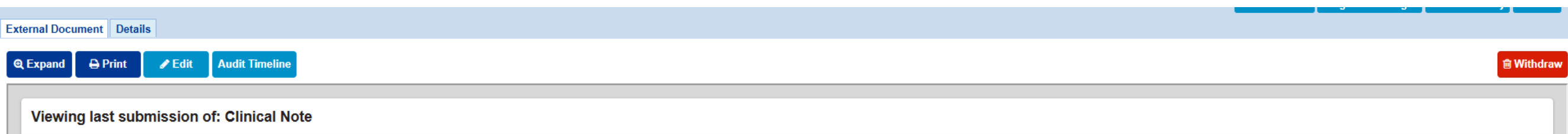
1

The completed **Clinical Note** will appear as an individual entry in the **Patient's Single Patient View**. Simply click on it to open the document in the right hand pane



2

In the right hand pane, you have the options to **Edit**, view the **Audit Timeline** and also **Withdraw** the **Clinical Note**.



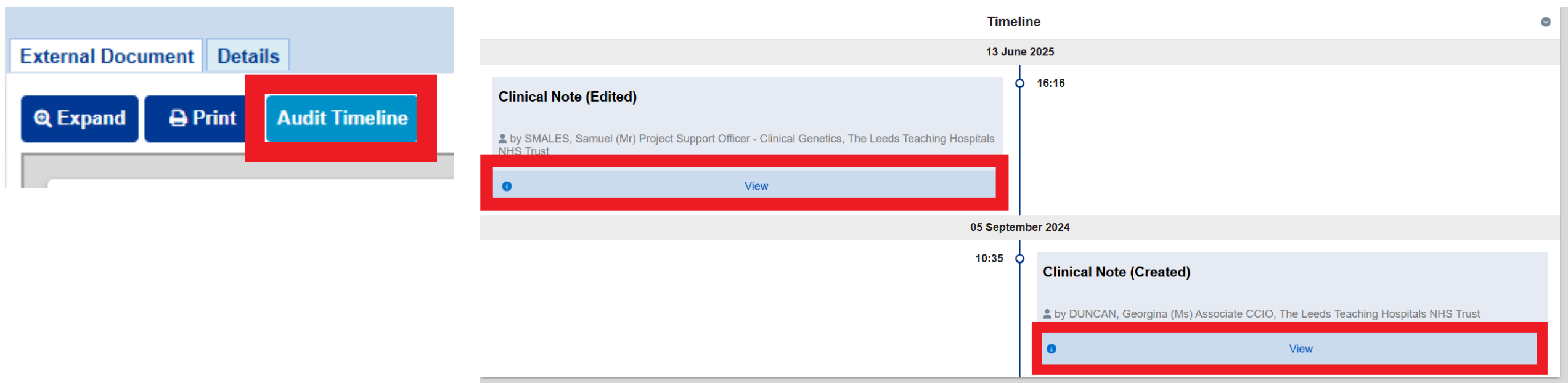
3

If you click on **Edit Document**, the **Clinical Note** will reopen for you to Edit as required. When you have finished, make sure you click on **Submit**.



4

Clicking **Audit Timeline** will show when the **Clinical Note** was **created**, **edited** and potentially **withdrawn**.



For further information please contact:

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8

Click on **Withdraw Document** to **Withdraw** the **Clinical Note** (You can also withdraw the document by clicking on the **Withdraw button**). Read the information in the **Withdraw window** and if happy, click on **Next**.

The screenshot shows a window titled "Viewing last submission of: Clinical Note". It contains a table with the following information:

Author	Date of activity	Time of activity
SMALES, Samuel (Mr)	13-Jun-2025	16:16

Below the table, there is a section for "Subject Line" with the text "Family discussion". To the right of the table, there is a "Withdraw" button. Below the table, there is a "Subject Line" section with the text "Family discussion".

The "Withdraw" dialog box is open, showing the following text:

This entry is part of a **Clinical-Note** document, by withdrawing this entry you will be withdrawing the original document.

It may be that not all information captured within the form is shown on this current summary view. Where there is additional information you can click on 'view document' to see the original document.

Please select "Next" if you would still like to withdraw this document.

Buttons: Cancel, Next

9

Supply a reason for **withdrawing** the **Clinical Note** and then click on the **Withdraw button**.

The "Withdraw" dialog box is open, showing the following text:

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.

entered for the incorrect Patient

Buttons: Cancel, Withdraw

10

Use the **Event filter** to search for a **Clinical Note** for the patient via the **Subject line** or the **Author** of the **Clinical Note**. This example is showing filtering by **Subject line**.

The screenshot shows a search results window. The search filter is set to "Therapy Goals". The results are limited to 2000 records. The results table shows the following information:

2025
13-May-2025 Clinical Note Therapy Goals: TEST ACCOUNT, T...

11

Also, if you type **image** into the **Event filter**, it will show all **Clinical Notes** with an **image attached**.

The screenshot shows a search results window. The search filter is set to "Image". The results are limited to 2000 records. The results table shows the following information:

2025
14-Apr-2025 Clinical Note annual check up: TEST ACCOUNT, ...

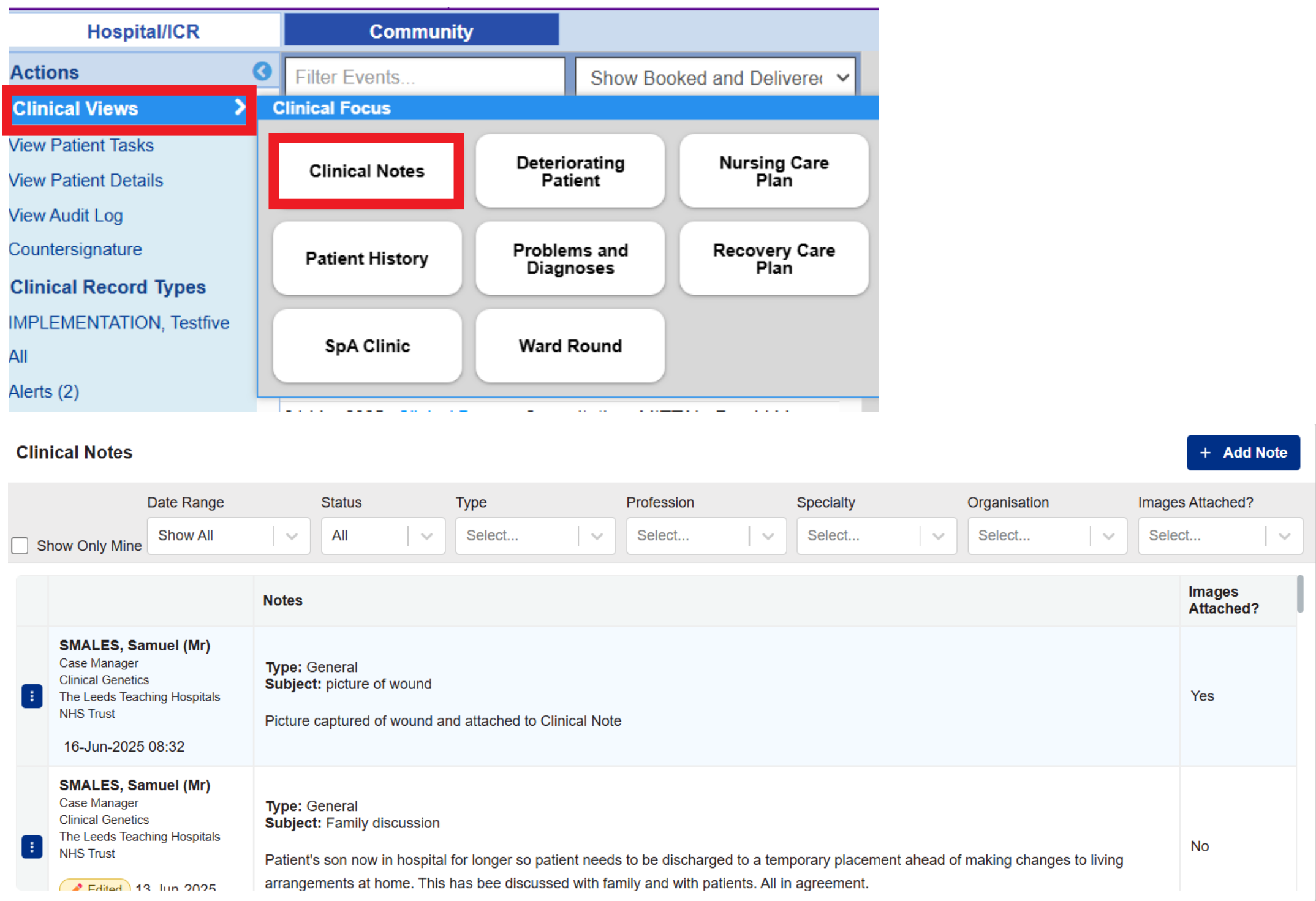
For further information please contact:

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Clinical Notes Dashboard (Overview)

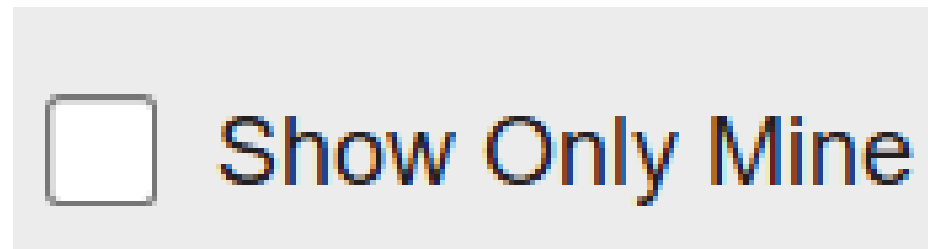
1

To navigate to the **Clinical Notes Dashboard**, click on **Clinical Views** in the **Patient's Single Patient View** and then click on **Clinical Notes**.



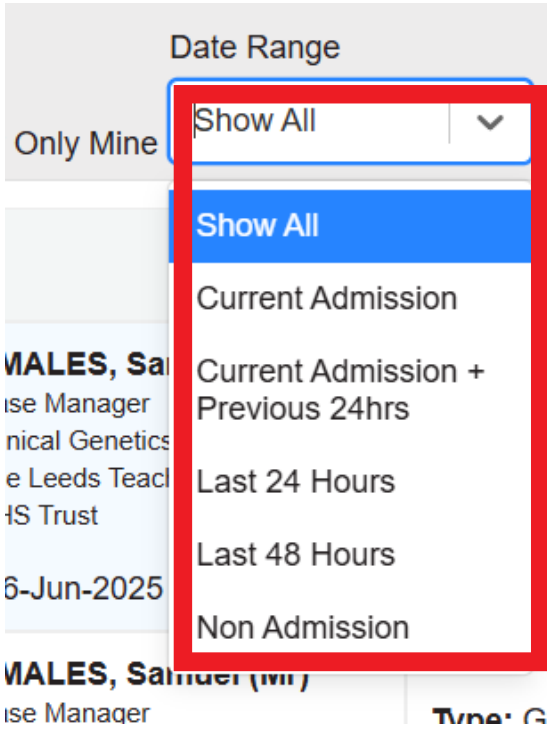
2

You can filter **Clinical Note Dashboard** to only show your created **Clinical Notes** for the Patient by clicking the **Show Only Mine** box.



3

You can also filter the **Clinical Note Dashboard** by **Current Admission**, **Current Admission +24 hours**, **Last 24 hours**, **Last 48 hours**, **Non Admission** or **Show All**.

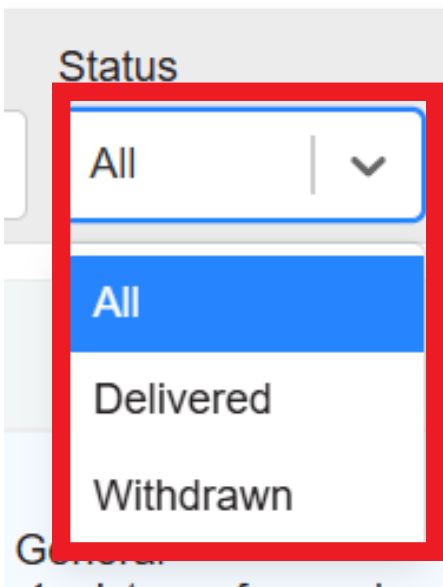


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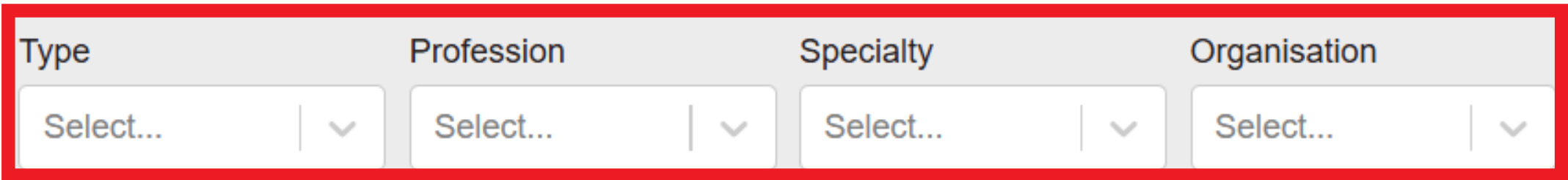
4

You can also filter the **Clinical Note Dashboard** view by **Delivered, Withdrawn** or **All** (**Withdrawn Clinical Notes** will have a line through them).



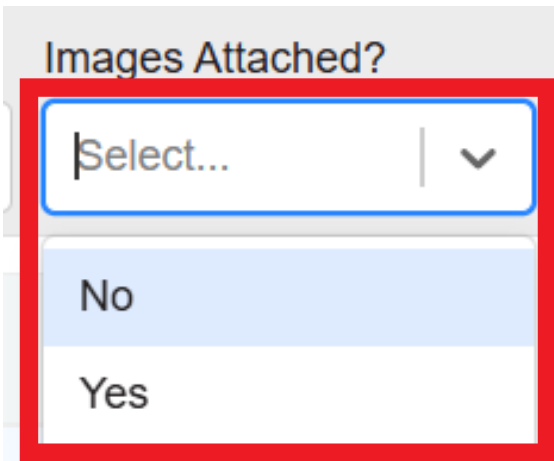
5

You can narrow down the **Clinical Note Summary Table** by **Profession, Speciality, Type** and **Organisation** by using the corresponding **filter dropdown** much like the **Clinical Note Summary Table** in the **Patient's Single Patient View**.



6

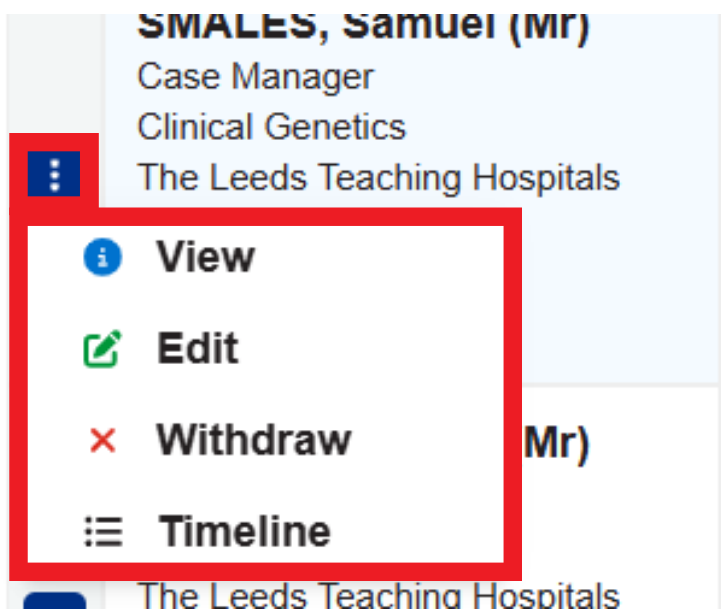
You can also filter the **Clinical Notes Dashboard** to show **Clinical Notes** with **images attached**.



You can filter down the **Clinical Notes Dashboard** for the **Patient** by applying as many filters as required. It is possible to have multiple of the same filters.

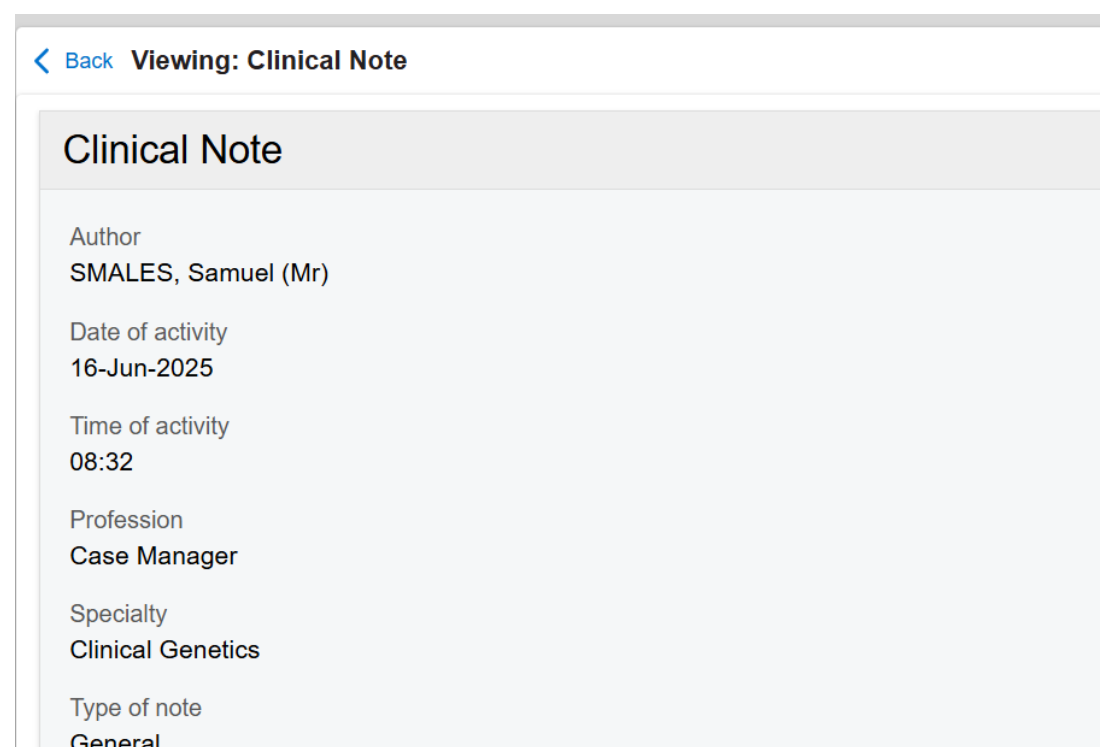
7

When you have located the **Clinical Note** of interest, click on the **blue square** for a **Clinical Note** entry to **Edit, View, Withdraw** and view the **Timeline** for a **Clinical Note** the **Clinical Note**.



8

If you click on **View**, you will be able to view the **Clinical Note** in a larger format.



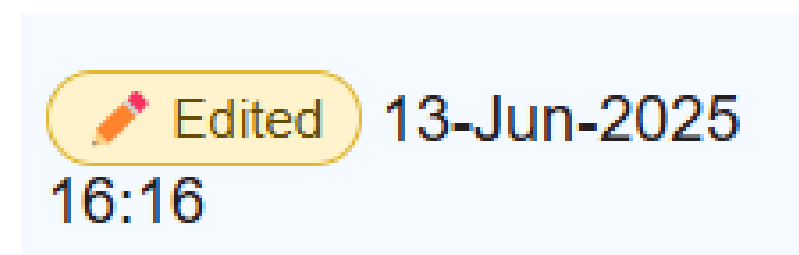
9

If you click on **Edit**, the **Clinical Note** will reopen for you to **Edit** as required. When you have finished, make sure you click on **Submit**.



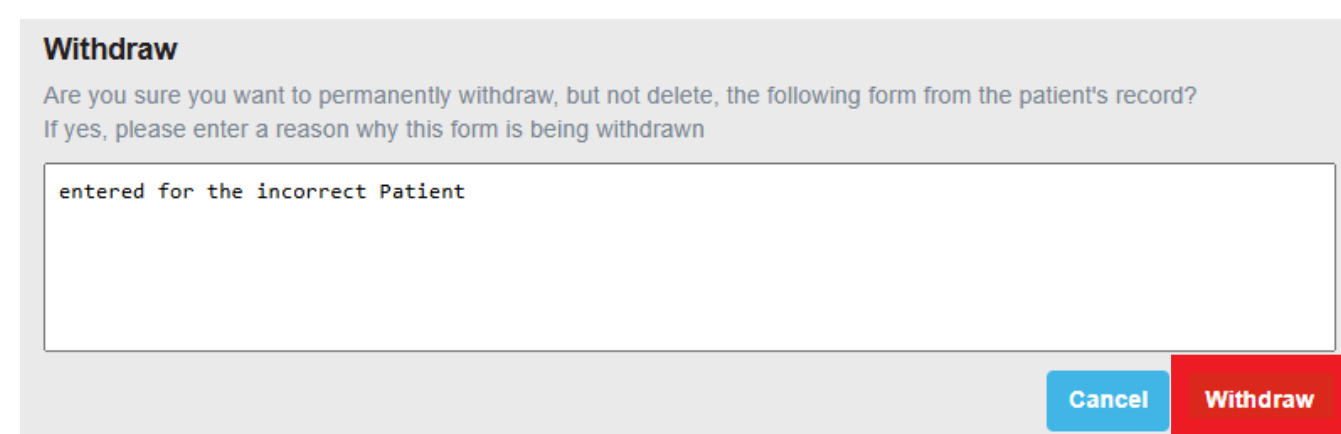
10

When the **Clinical Note** has been edited, it will be visible in the **Dashboard** by the **Pencil icon** near the entry. When you position your cursor over the **Pencil icon** in the **Clinical Note** entry, you can see when the **Clinical Note** was last edited.



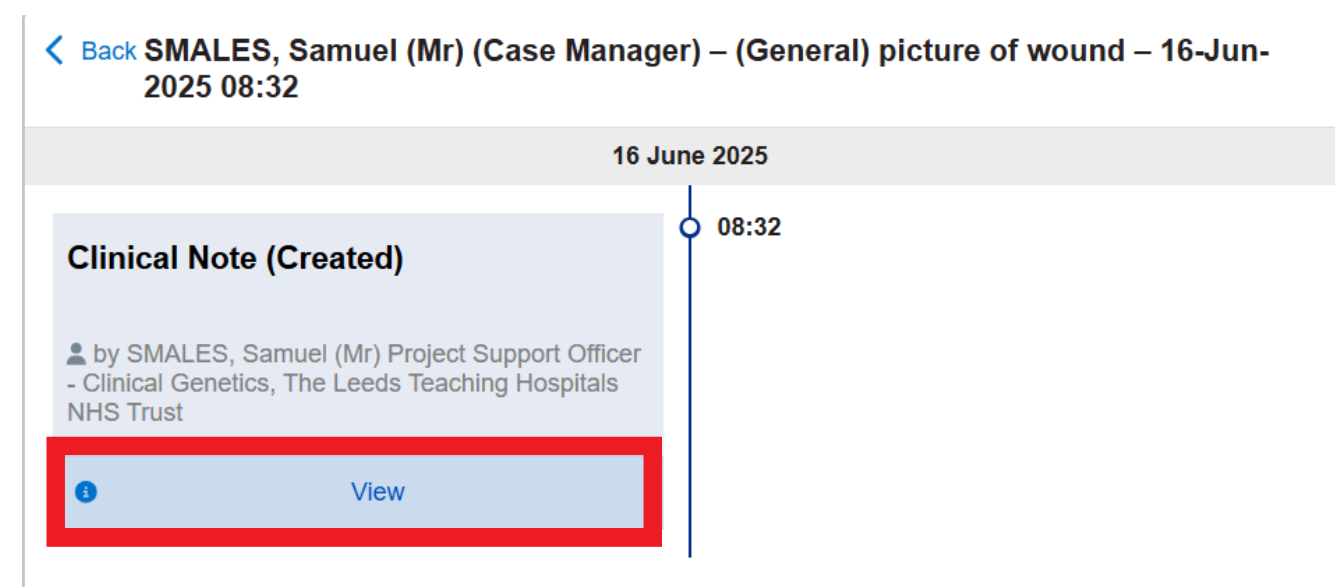
11

Click on **Withdraw Document** to **Withdraw** the **Clinical Note**. Supply a **reason** for **withdrawing** the **Clinical Note** and then click on the **Withdraw button**.



12

If you click on **Timeline** for a **Clinical Note**, you can view when the **Clinical Note** was **created**, **edited** and potentially **withdrawn**. Click on **View** for particular to view in greater detail.

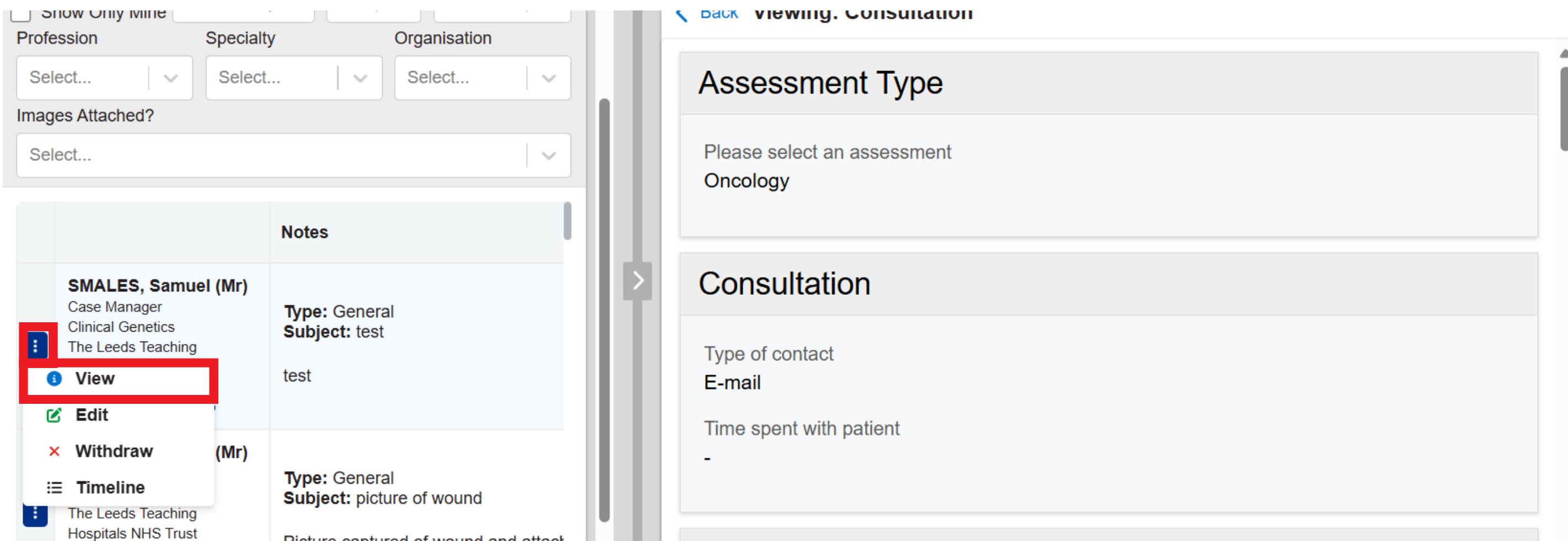


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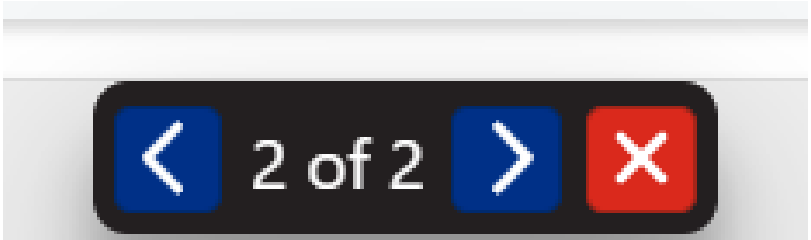
13

If you are viewing a **Clinical Note** and wish to **view additional Clinical Notes** at the same time, on the **left hand side** of the screen you'll see a list of available **Clinical Notes**. Find the additional **Clinical Note** you want to view. Click the **blue square icon** next to it and then click on **View**.



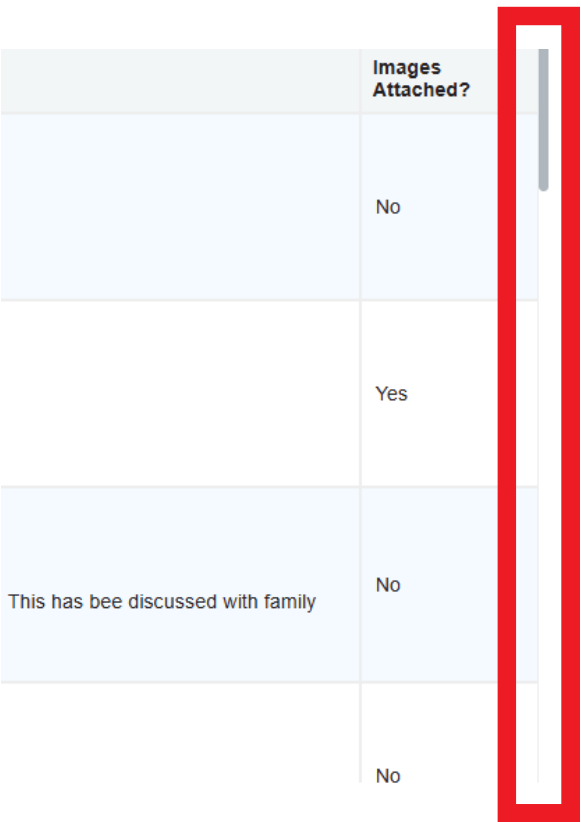
14

Once multiple **Clinical Notes** are open, you can easily cycle between them using the **note switching tool**. Continue selecting and **viewing additional Clinical Notes**. They will be added to your **cycle list**, allowing you to switch between all **Clinical Notes** of interest seamlessly. Repeat this process if you want to view another **Clinical Note** at the same time.



15

You can scroll seamlessly through **Clinical Notes** for a **Patient** within the **Clinical Note Dashboard**. Therefore, you can view all **Clinical Notes** in one view.



16

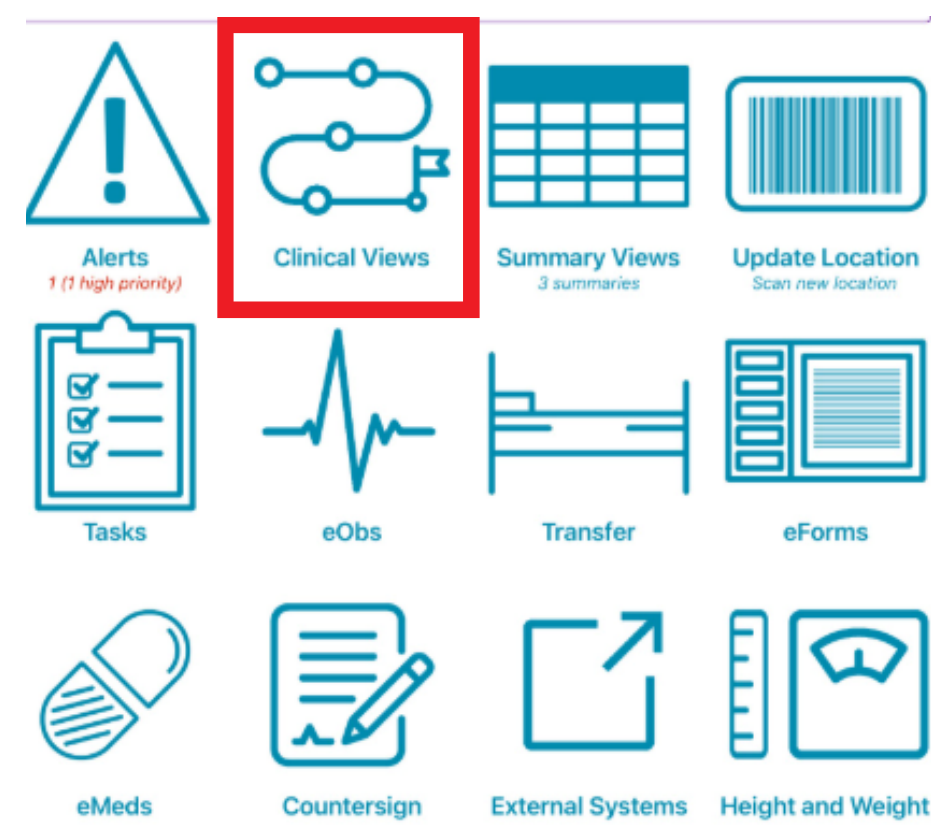
You can also Add a **Clinical Note** via the **Clinical Notes Dashboard** by clicking on the **+Add Note button**.



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 leedsth-tr.ImplementationTeam@nhs.net

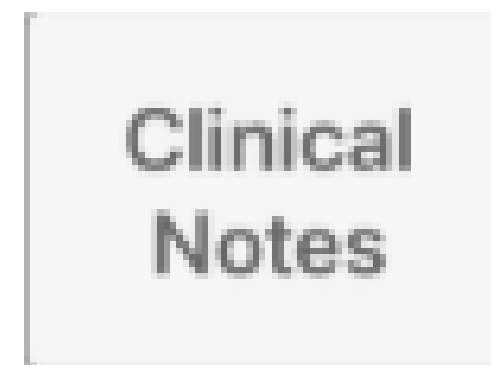
17

The **Clinical Notes Dashboard** is also available on the **PPM+ Mobile app**. Navigate to the **Patient's Action screen**.



18

Then click on **Clinical Views** and then click on **Clinical Notes**. The **functionality is the same as shown above**. For further information about how to use the **PPM+ Mobile app** - [**Click Here**](#).



The **Clinical Notes Dashboard** is now available as a widget within both the **Recovery Care Plan** and **Ward Round Dashboards**, offering a consistent and streamlined experience across platforms.

For further information please contact:

✉ leedsth-tr.ImplementationTeam@nhs.net

Useful Contacts

Implementation Team

Please contact the **Implementation Team** for Digital support & training on PPM+ functionalities.



leedsth-tr.ImplementationTeam@nhs.net

IT Service Desk

Please contact the **IT 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.



x26655



<https://lth-dwp.onbmc.com>



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