

ppm+

Clinical Summary (Formerly Patient History)

USER GUIDE



#LeedsDigitalWay

CONNECTS • TRANSFORMS • IMPROVES

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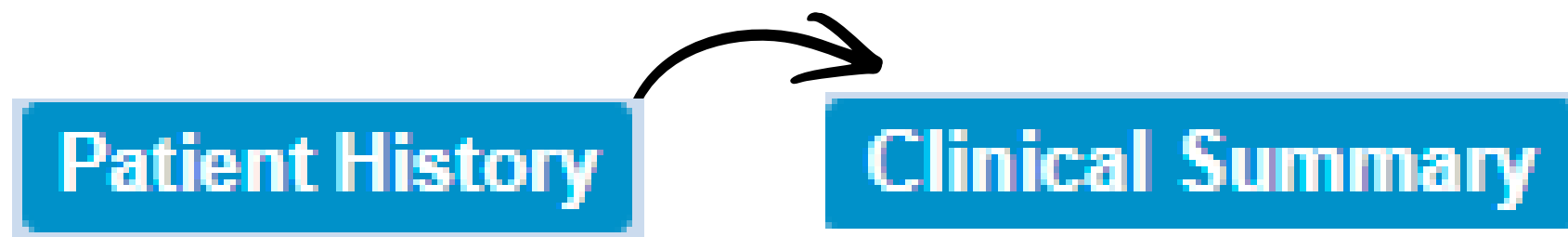
For further information please contact:

✉ leadsth-tr.ImplementationTeam@nhs.net

Clinical Summary Dashboard - Key Changes

1

The existing **Patient History tab/Dashboard** has been updated and renamed to **Clinical Summary**.



This change **improves clarity** and brings together **patient history information** from both **PPM1 (The H button)** and **PPM+** into **one consistent view**.

2

The previous **advisory banner** stating “**All entries shown here originate from the PPM1 system**” has been **removed** to **simplify** the interface and **reduce confusion**.

3

For **PPM1 entries’ titles**: pulled from the Title/Version field

For **PPM+ entries’ titles**: pulled from the **Subject line field**

Clinical Summaries

Diabetes medication
15-Jun-2026

Pacemaker
15-Jun-2026

4

Entries will be shown in a **list view** by **default**. The list will be sorted by **last modified** date, with the **most recent** entries appearing **first**. If there are **many entries**, users will be able to **scroll through** the list.

If **no clinical summaries** exist for a patient, the **following message** will be displayed:

Clinical Summaries

No summary text entered

For further information please contact:

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5

The **Clinical Summary Dashboard** in **PPM+** will have the following behaviour regarding **Clinical Summaries/Patient Histories** that have been **created/edited/withdrawn** in **PPM+** or **PPM1**:

- If a new **Clinical Summary/Patient History** is created in **PPM1**, this will be visible in the **Clinical Summary Dashboard** in **PPM+** automatically.
- If a **Clinical Summary/Patient History** is edited in **PPM1**, the information will be **updated** for the **corresponding entry** in the **Clinical Summary Dashboard** in **PPM+** automatically.
- It is not possible to **edit** or **withdraw Clinical Summaries/Patient Histories entries** from **PPM1** within **PPM+**. They are **view only** within **PPM+**.
- Any **edits** or **withdrawing** of any PPM1 entered **Clinical Summaries/Patient Histories** need to be completed in **PPM1**.
- Any **Clinical Summaries** created in **PPM+** will **not show** in **PPM1**.
- The **'H'** button in **PPM1** will have **no change** in its **behaviour**.

6

For **Clinical Summary entries** created in **PPM+**, users can **interact** with the **entries** directly within the **Dashboard**, depending on their **access permissions**. These actions include:

- **Viewing the full Clinical Summary from the Dashboard.**
- **Launching new Clinical Summary eForms via the +Add button.**
- **Editing existing PPM+ Clinical Summaries.**
- **Withdrawing PPM+ Clinical Summaries.**

Edit
View
Withdraw

+ Add New

7

Summary of Key Improvements:

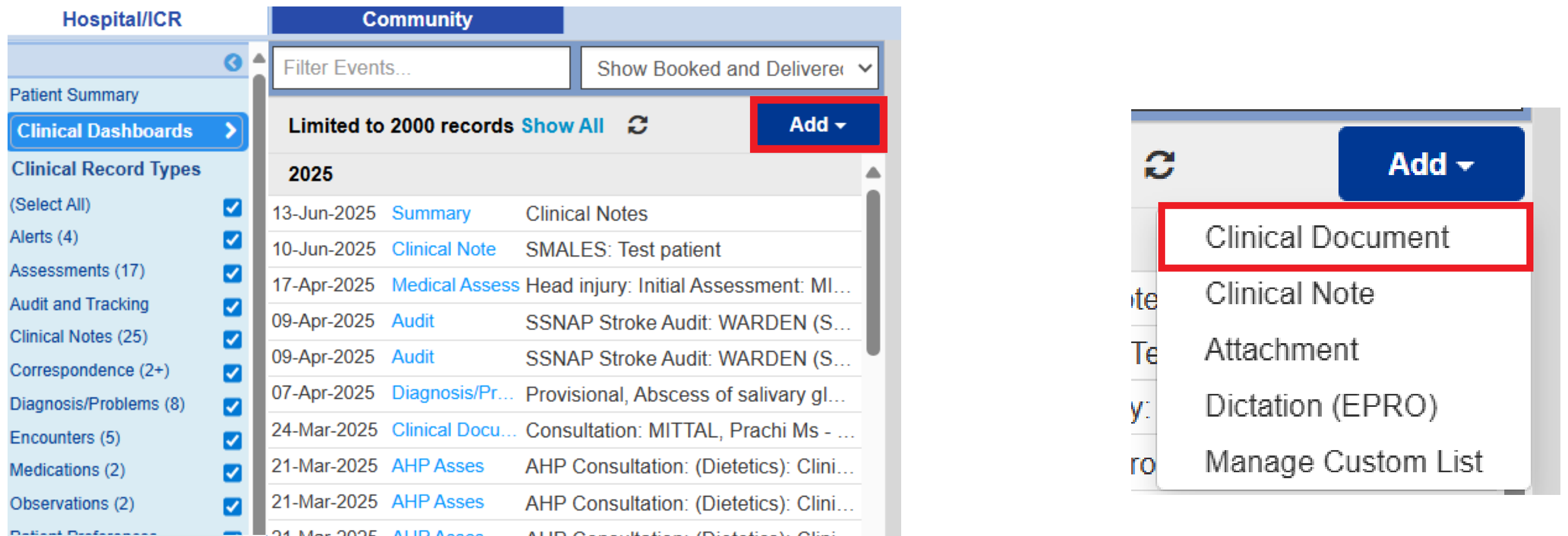
- **Clearer naming (Clinical Summary) to reflect purpose.**
- **Combined view of PPM1 and PPM+ data within PPM+**
- **Automatic syncing of updates from PPM1 into PPM+.**
- **Improved usability with sorted, scrollable list view.**
- **Controlled editing to ensure data integrity.**
- **Actions (create/edit/withdraw) available directly in the Clinical Summary Dashboard for authorised users.**

For further information please contact:

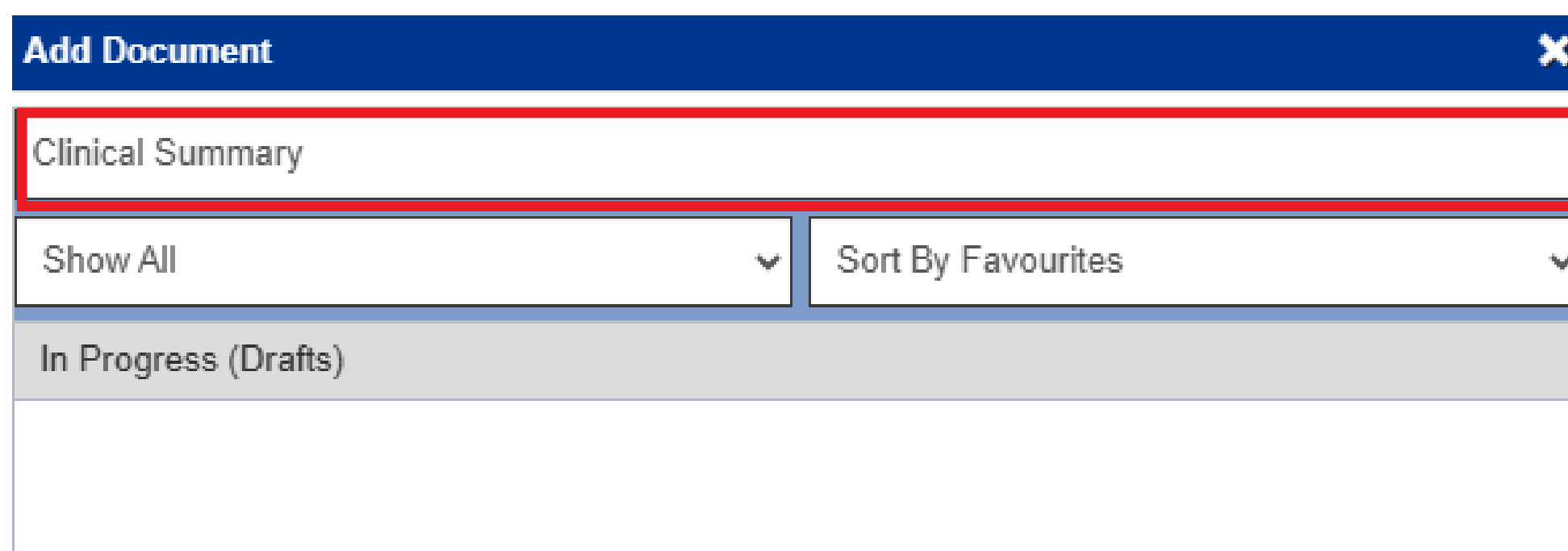
✉ leedsth-tr.ImplementationTeam@nhs.net

Navigating to the Clinical Summary eForm

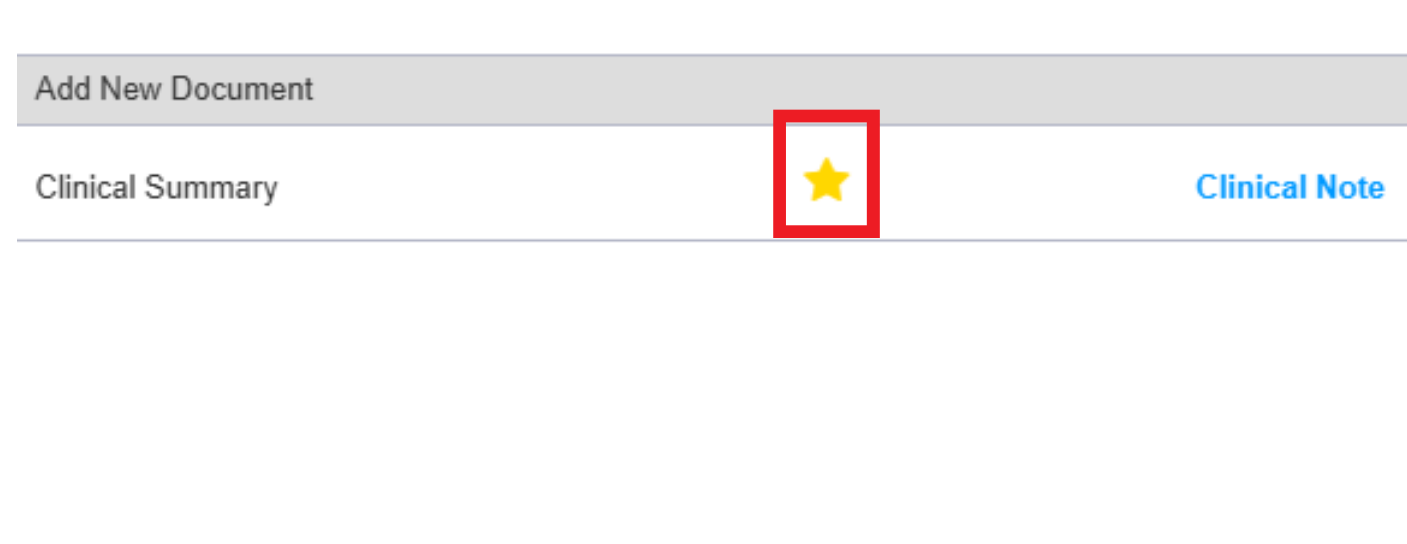
- 1 You can add a **Clinical Summary** via the **Patient's Single Patient View**, click on the **Add** button and select **Clinical Document**.



- 2 In the filter section section within the **Add Document** window, type in **Clinical Summary**.



- 3 The **Clinical Summary eForm** will then appear in the **Add New Document** section. Click on the **Star Icon** to favourite the **eForm**, therefore it will appear at the top of **Add New Document** section when you need to another **Clinical Summary** for the same Patient or a different patient in the future.

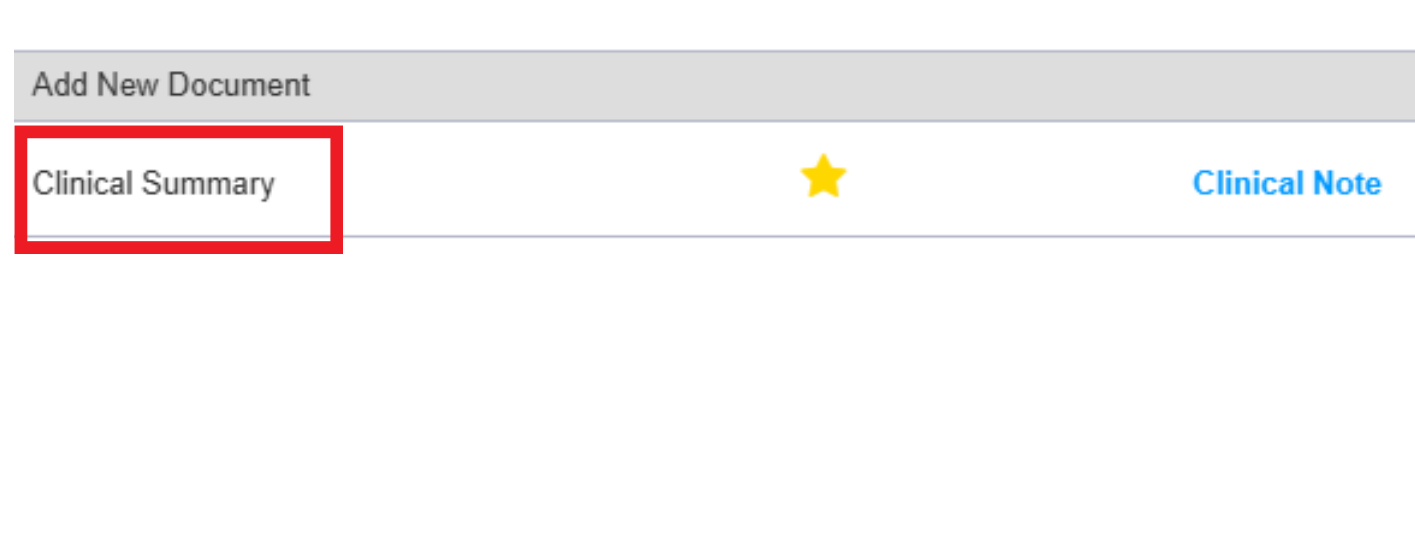


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4

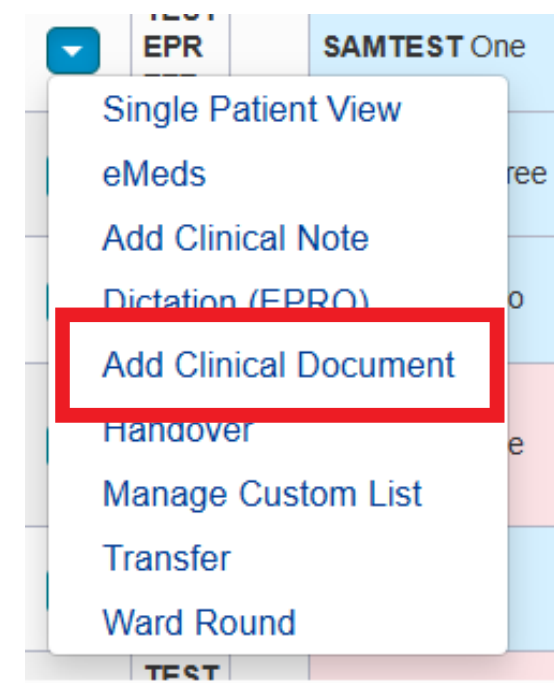
Simply click on the **eForm's** name to open it.



5

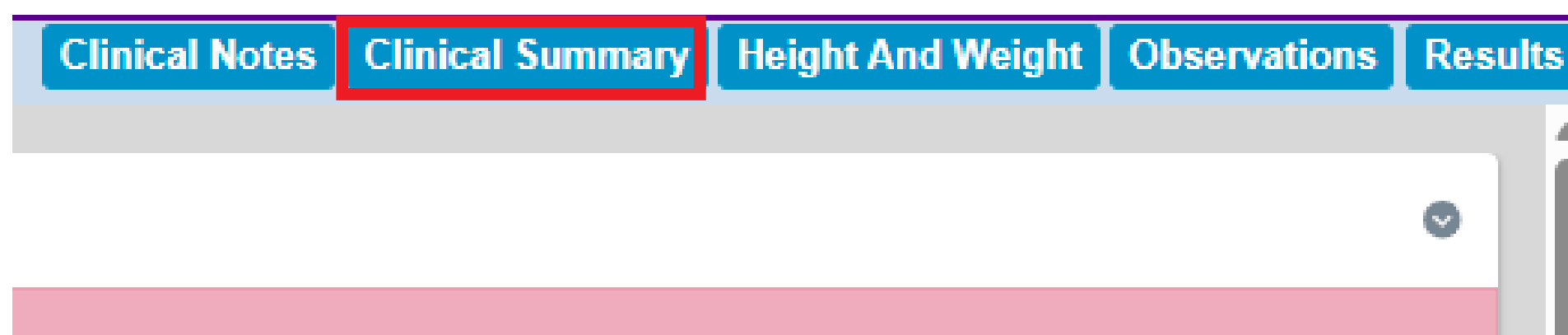
You can also add a **Clinical Summary eForm** from the **Multi Patient View** for your **Clinical Area**. Click on the **blue square arrow/drop down** for your Patient and then select **Add Clinical Document** and follow the process shown above.

	TEST EPR ZZZ	SAMTEST Four	!	27y	136d 23h 18m	5 (5 overdue) ?	RTT	Cardiology	137d	
	TEST EPR ZZZ	SAMTEST One	!	27y	136d 23h 50m	5 (5 overdue) ?	A	Medicine	137d	
	TEST EPR ZZZ	SAMTEST Three	!	27y	136d 23h 20m	5 (5 overdue) ?	RTT	Cardiology	137d	
	TEST EPR ZZZ	SAMTEST Two	!	27y	136d 23h 49m	5 (5 overdue) ?	A	Medicine	137d	



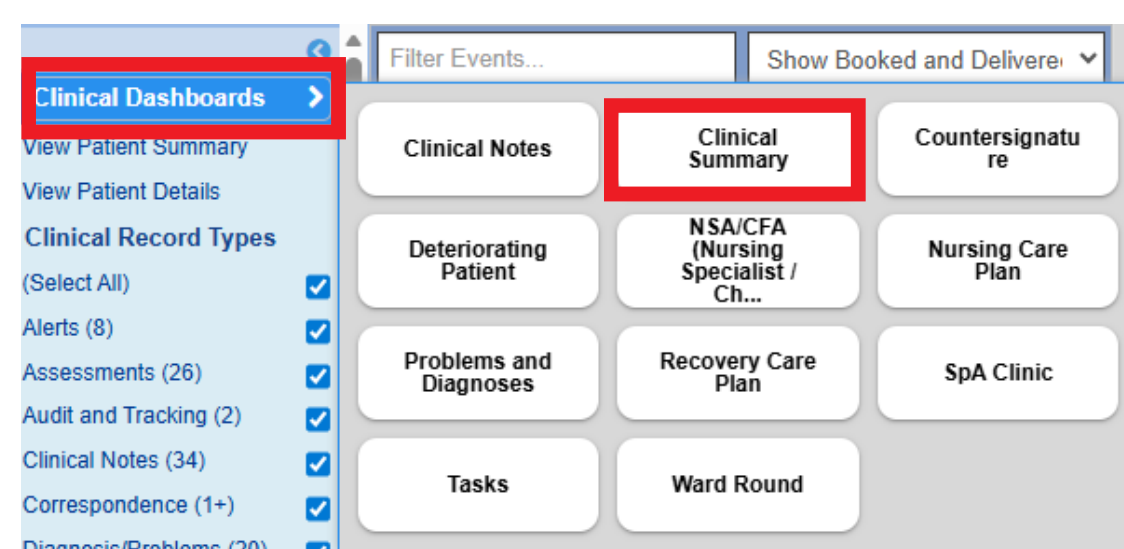
6

You can also add a **Clinical Summary** via the **Clinical Summary Dashboard**. To navigate to the **Clinical Summary Dashboard**, on the **Patient's Single Patient View**, click on the **Clinical Summary** tab near the top of View.



7

Another way to navigate to the **Clinical Summary Dashboard** is by clicking on **Clinical Dashboards** in the **Patient's Single Patient View** from the left hand side and then click on the **Clinical Summary** tab.

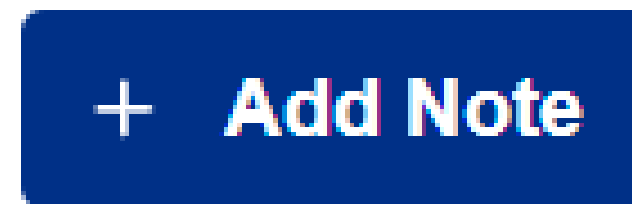


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Then click on the **+Add Note button** to navigate to the **Clinical Summary eForm**.



It is possible to add a Clinical Summary eForm 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 Summary eForm

1

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

The screenshot shows the top section of the eForm. The 'Author' field is highlighted with a red box and contains 'SMALES, Samuel (Mr)'. The 'Date of activity' field shows '13/06/2025' with a calendar icon and '13-Jun-2025' below it. The 'Time of activity' field shows '14:42' with a clock icon and 'Format HH:mm' below it. The 'Profession' field is a dropdown menu with 'Select...' and a downward arrow. The 'Specialty' field is a dropdown menu with 'Clinical Genetics', an 'X' icon, and a downward arrow. The 'Type of note' field is a dropdown menu with 'General', an 'X' icon, and a downward arrow. The 'Subject Line' field is empty with a '0 / 200' character count.

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](#).

This screenshot is similar to the first one, but the 'Specialty' dropdown menu is highlighted with a red box and contains 'Clinical Genetics'. The 'Profession' dropdown menu is now empty with 'Select...' and a downward arrow. The 'Date of activity' and 'Time of activity' fields remain the same. The 'Type of note' field is still 'General'.

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.

This close-up shows the 'Specialty' dropdown menu with 'Clinical Genetics' selected. A red box highlights the 'X' icon and the downward arrow.

This close-up shows the dropdown menu open, displaying a list of specialties. The 'All' option is highlighted. The list includes: All, Accident and Emergency, Acute Internal Medicine, Addiction Services, Adult Cystic Fibrosis, Allergy, Allied Health Professional, and Anaesthetics. A red box highlights the entire dropdown menu.

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4

Select your **Profession** from the drop down arrow. You will notice a more standardise set of choices.

Profession *

Select...

- Administrative AND/OR managerial worker
- Administrative healthcare staff
- Advanced clinical practitioner
- Anaesthesia associate
- Associate specialist
- Biomedical scientist
- Case manager
- Chaplain

5

Next, make sure the **Type of note** is **Clinical Summary**. Please **DO NOT** change this.

Type of note *

Clinical summary

6

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:

Date of activity *

13/06/2025

13-Jun-2025

Time of activity *

14:42

Format HH:mm

June 2025

Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Clear Today

7

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

Subject Line *

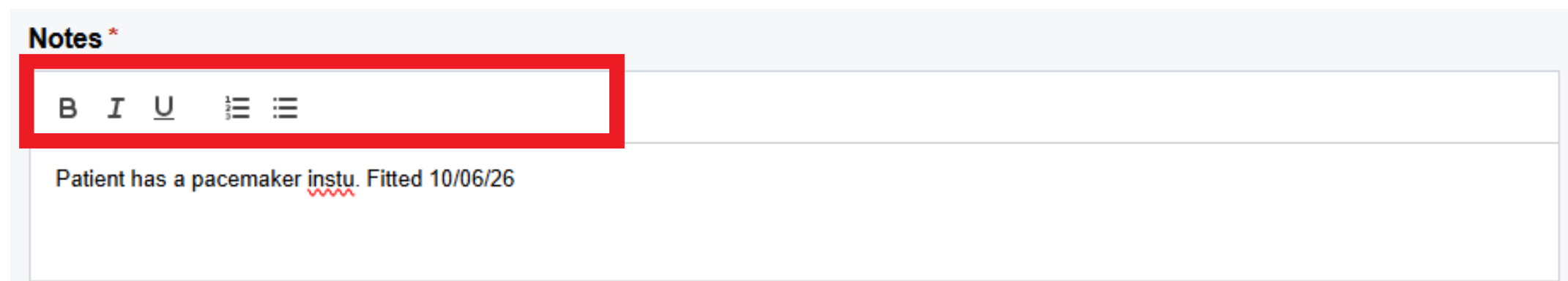
Pacemaker

For further information please contact:

✉ leadsth-tr.ImplementationTeam@nhs.net

8

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



The screenshot shows a 'Notes' section with a red box highlighting the formatting toolbar. The toolbar contains icons for Bold (B), Italic (I), Underline (U), Bulleted List, and Numbered List. Below the toolbar, the text 'Patient has a pacemaker instu. Fitted 10/06/26' is visible, with 'instu' underlined in red.

9

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



Please be aware, the Clinical Summary eForm/functionality uses elements of the Clinical Note functionality. If you add a Clinical Summary via a route not shown in this user guide (e.g. via the Clinical Note eForm or within the Clinical Notes Dashboard), it will not be visible in the Clinical Summary Dashboard, as required.

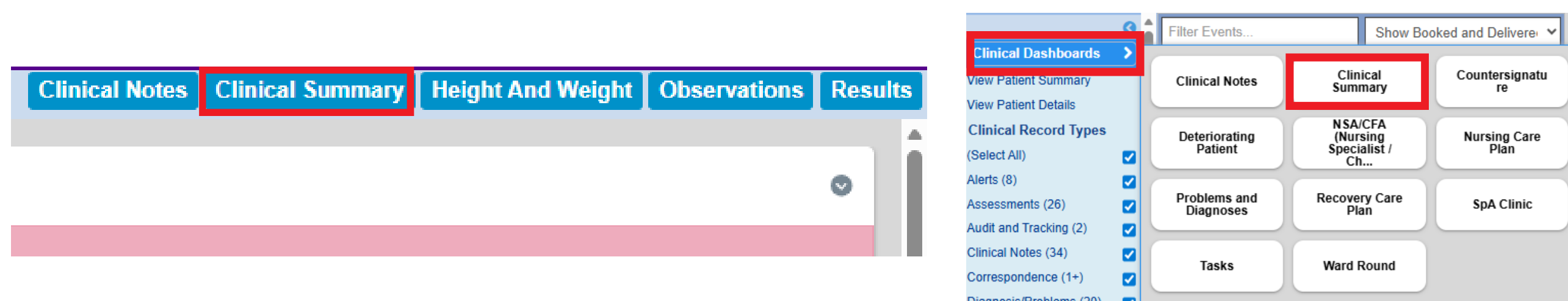
For further information please contact:

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Viewing, Editing and Withdrawing a Clinical Summary eForm

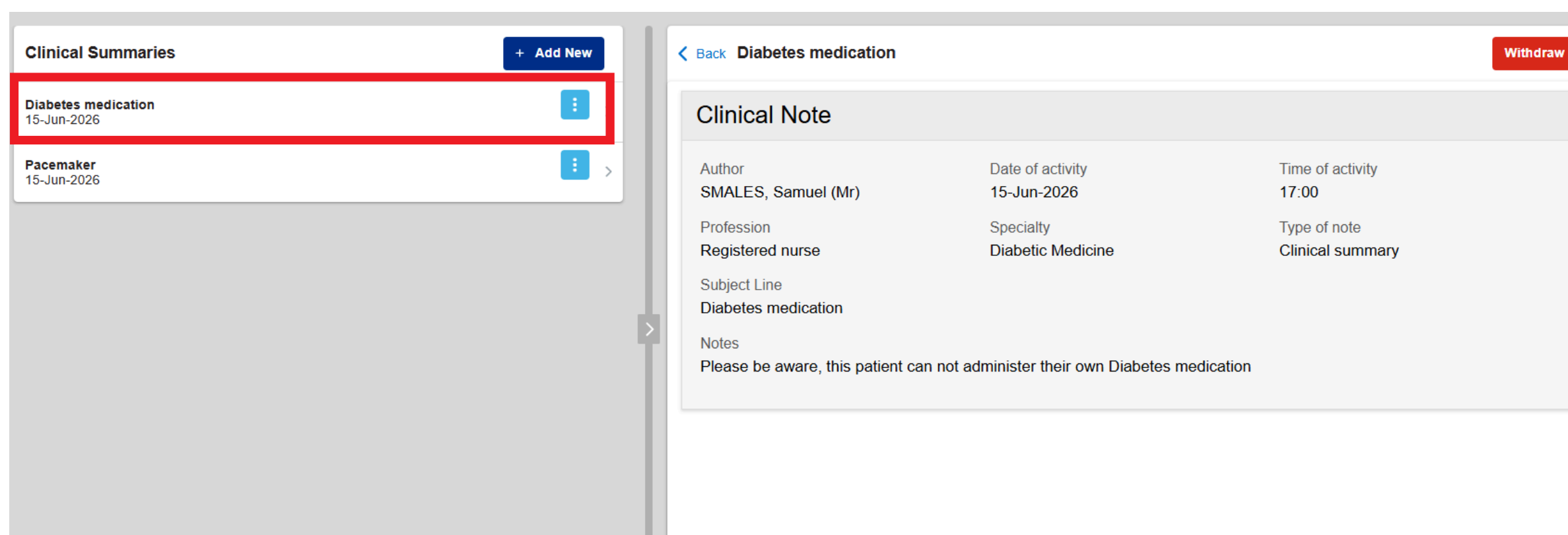
1

To **view**, **edit** and **withdraw** a completed **Clinical Summary eForm** entry, navigate to the **Clinical Summary Dashboard** by your preferred method, as shown below in the **Patient's Single Patient View**.



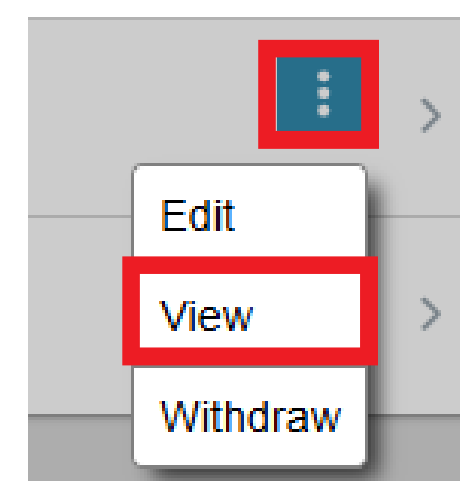
2

Click on the **Clinical Summary entry** of interest to view it.



3

If you click on the **blue square**, next to your **Clinical Summary entry** of interest, you can also view it in **more detail** by clicking on **View**.

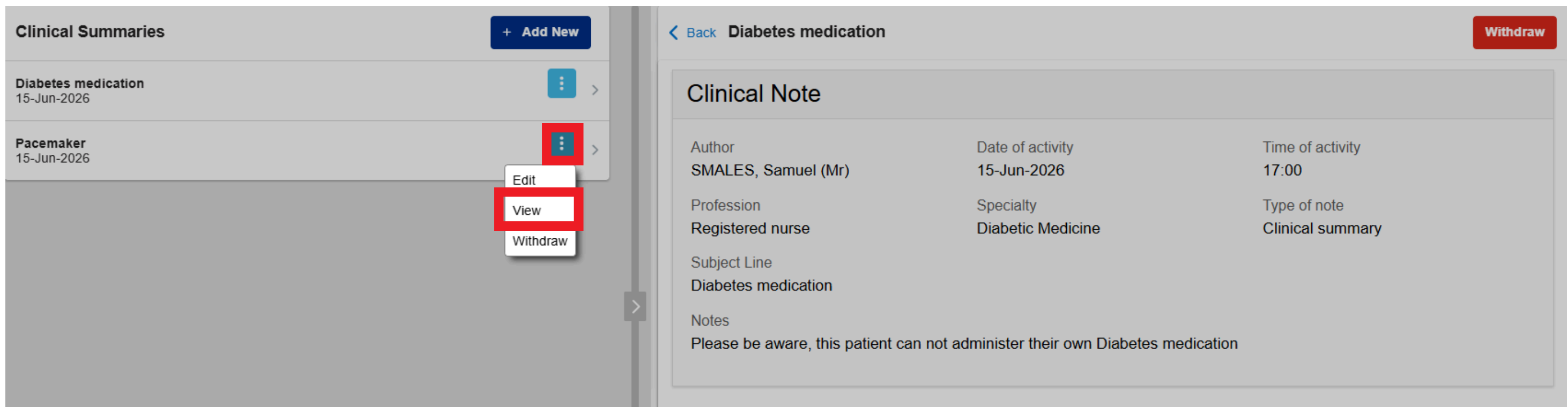


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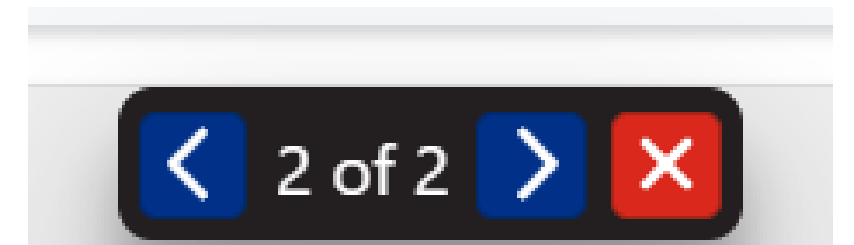
4

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



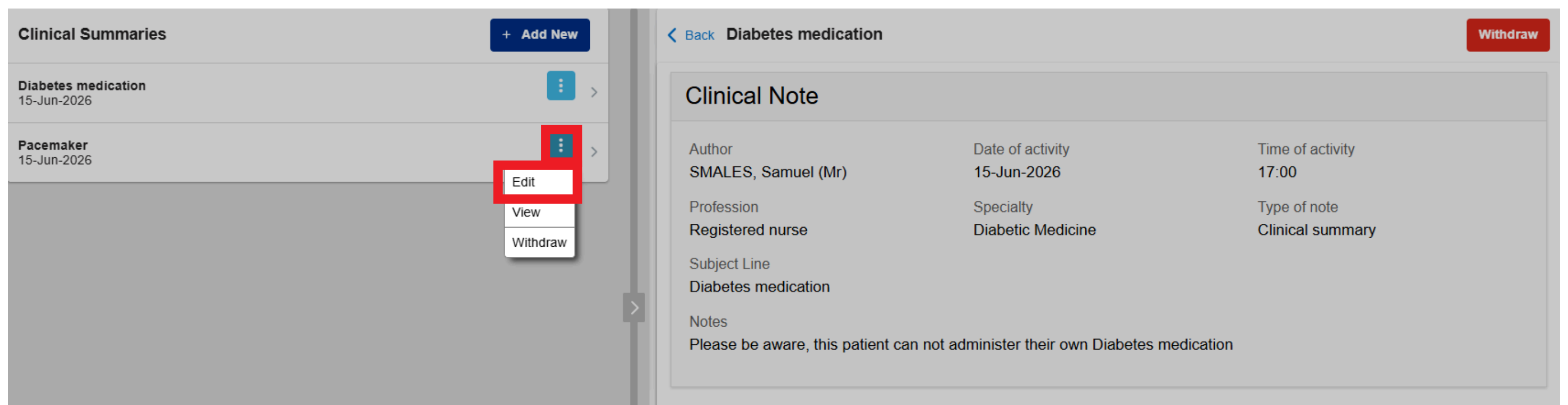
5

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



6

To **edit a Clinical Summary entry**, click on the blue square for a **Clinical Summary entry** and then click on **Edit**.



For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net

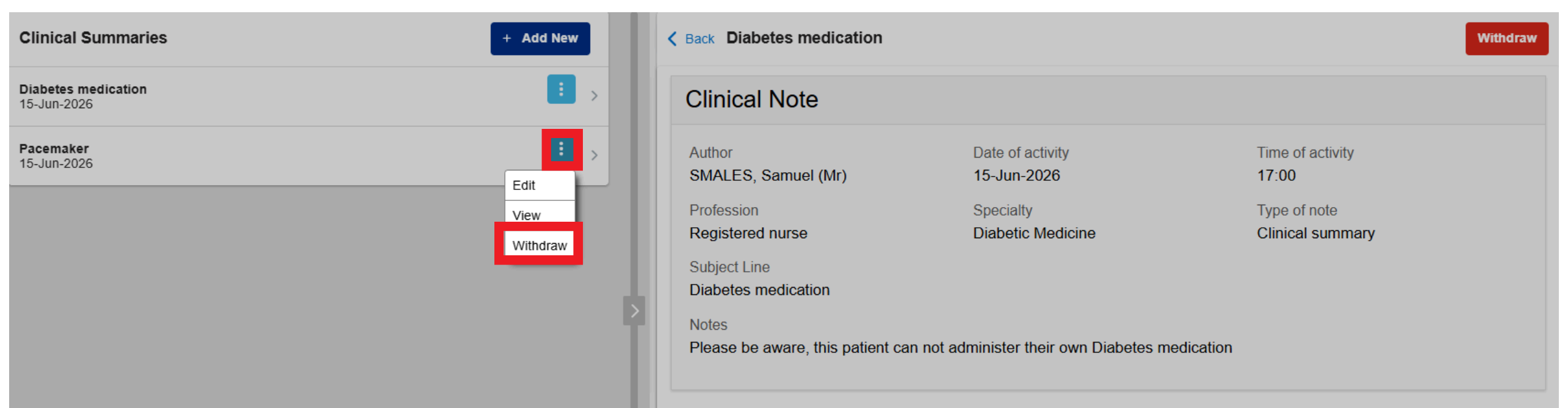
7

The **Clinical Summary eForm** will then open. Make any required **edits**. When you have finished, make sure you click on **Submit**.



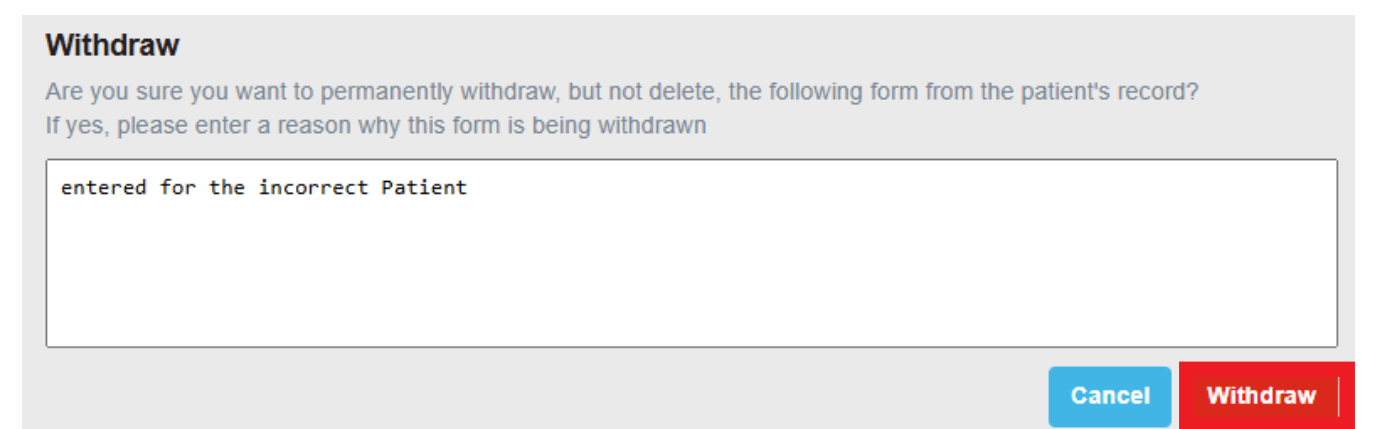
8

If you want to **Withdraw** a **Clinical Summary entry**, click on **Withdraw**.



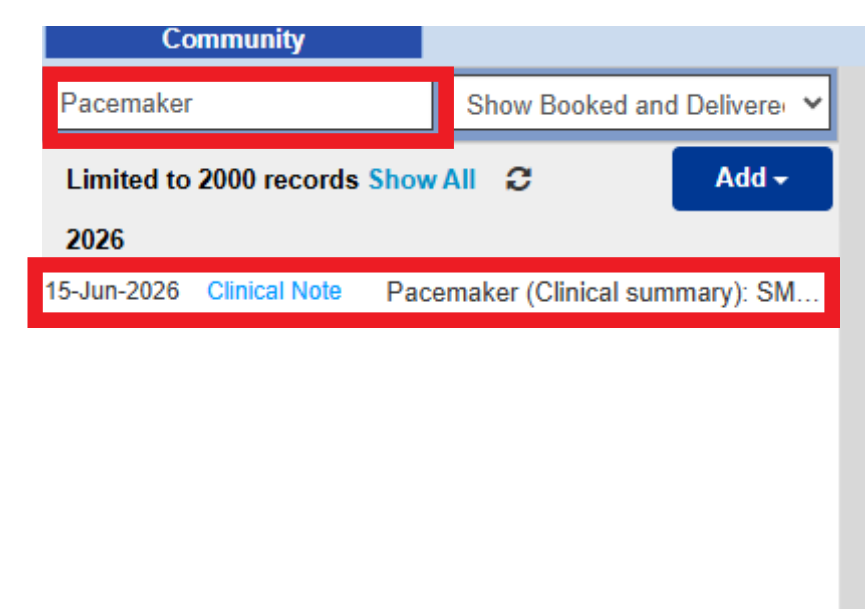
9

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



10

You can also **view, edit** and **withdraw** a **Clinical Summary entry of interest** in the **Patient's Single Patient View**. In the filter events section type in the **Subject Line** of **Clinical Summary**. For this example, we have entered **Pacemaker**. When you have found the **Clinical Summary entry of interest**, simply click on it.

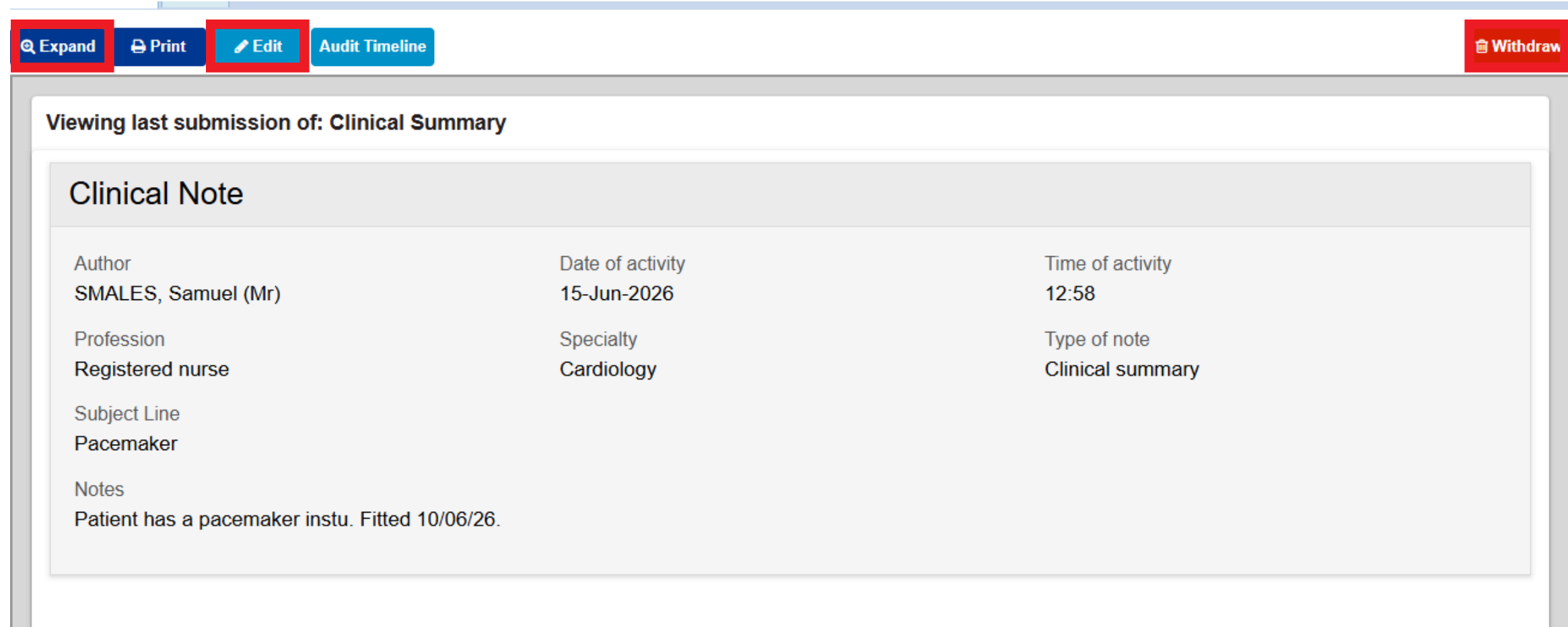


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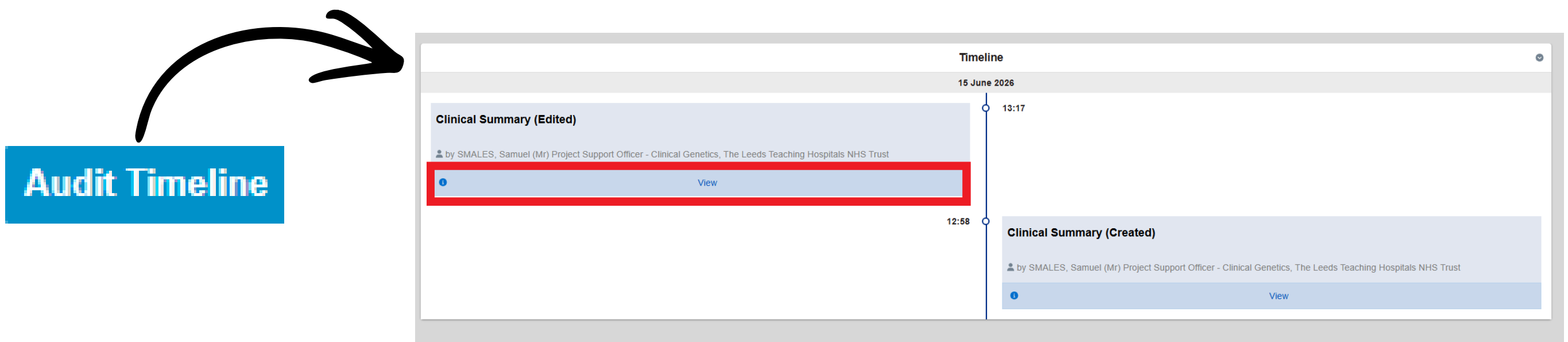
11

The **Clinical Summary entry** will open on the right hand side of the screen. Click on the **Expand** button to view the entry in a larger format. Click on the **Edit** button to **edit** the **entry**, as shown previously. Click on the **Withdraw** button to **withdraw** the **entry**, as shown previously.



12

If you click on the **Audit Timeline** button, you can view when the **Clinical Summary entry** was **created, edited** and potentially **withdrawn**. Click on **View** for particular entry to view it in greater detail.



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/>