



# Custom Patient Lists

(Write Access Users Only)

USER GUIDE



**#LeedsDigitalWay**

CONNECTS • TRANSFORMS • IMPROVES



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Create a personalised list by adding and removing individual patients on PPM+, this includes both patients that are admitted and not admitted.

**Currently Admitted Patient List----- Page 6**

This allows you to create a Recently Admitted Patient List using multiple filters e.g. patients admitted to a ward in the last 24 hours under Dr. Bloggs.

**Recently Discharged Patient List----- Page 9**

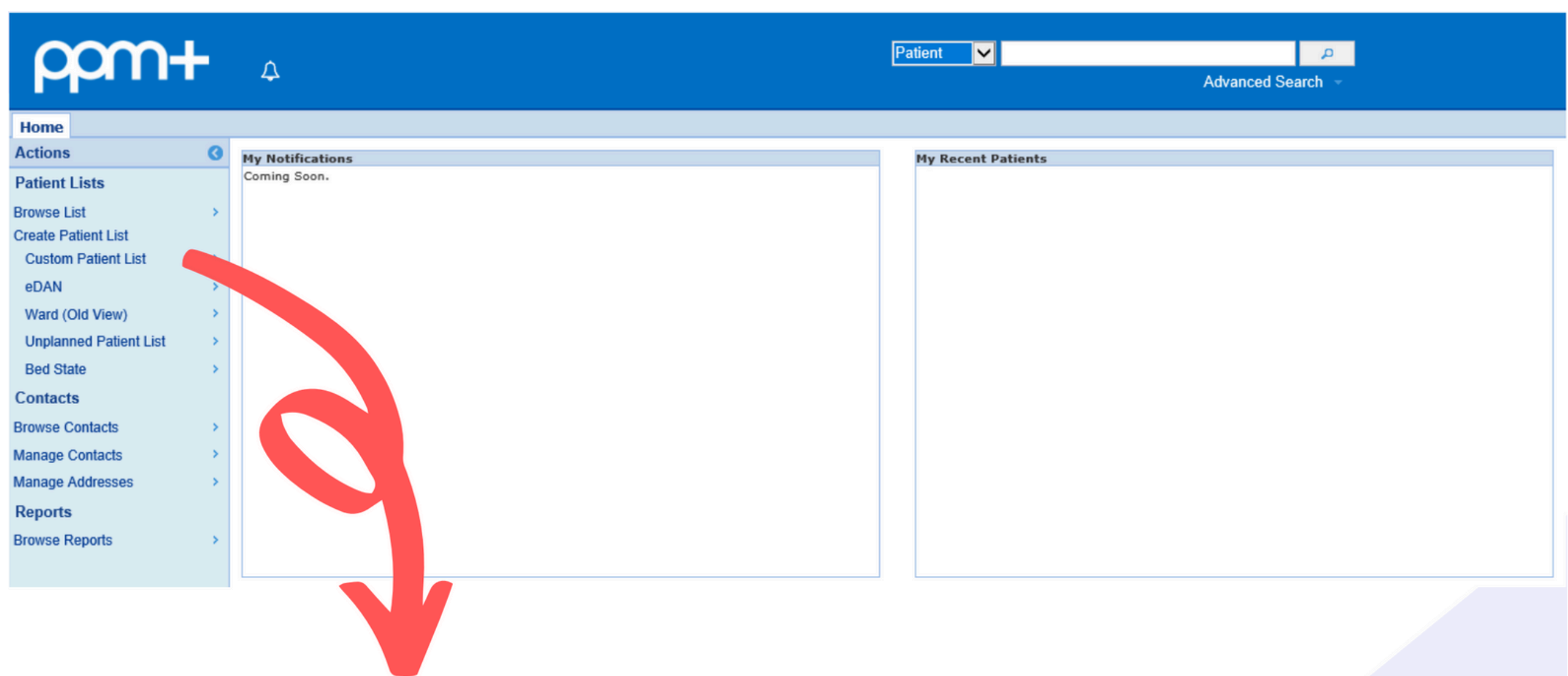
This allows you to create a Discharged Patient List using multiple filters e.g. ward attenders discharged from your ward in the last 24 hours.

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Find, share and edit a Custom Patient List. Find out about Handover Tips for your Custom Patient List.

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# Patient List



From the PPM+ homepage click on **Custom Patient List**.

The screenshot shows the 'Custom View' interface. At the top, there are two input fields: 'Category' (with a dropdown menu) and 'Name' (with a text input). Below these are 'Filters' and 'Sharing' tabs. The 'Filters' tab is active, showing a 'Choose Filter Type' section with a dropdown set to 'Patient' and a search bar containing 'testteam'. Below the search bar is a list of patients. The first patient, 'TESTTEAM, Five-Five (Mrs)', is highlighted in green. To the right of this list is a 'Filter Criteria' table. The first row of this table is highlighted in green and contains the patient's name, date of birth, and NHS number. At the bottom right, there is a 'Save' button. Numbered red boxes and arrows indicate the following steps: 1. Select 'Patient List' in the 'Category' dropdown. 2. Select 'Patient' in the 'Choose Filter Type' dropdown and click the plus icon next to the first patient in the list. 3. Click the 'Name' input field to rename the list. 4. Click the bin icon next to the first patient in the 'Filter Criteria' table to remove it.

- 1 From the category dropdown list select **Patient List**.
- 2 From the filter types select **Patient**.  
Search patient by name or NHS number and click the plus icon this will add the patient to your list.
- 3 Click **Name** to rename your **Patient List** and click save. Remember to give your Patient List a unique name to differentiate it from the others
- 4 If you add a patient to the list by mistake use the **bin icon** and this will remove them. Once all information is correct, click **Save**.

This is what your **Patient List** will look like

Home

Browse Patient Lists x

Custom Patient List x

Actions

Create Copy

Edit Custom List

Handover

test 99 ⓘ

Action	Patient	NHS Number	Age	Ward	Review Date	Comments
▼	ANN TEST Ann		80y			
▼	DENTAL Test ⓘ		45y			
▼	DENTAL Test ⓘ		19y			
▼	TESTTEAM Five-Five ⓘ	999 999 9557	34y	LPMI (LGI)		
▼	TESTTEAM Four ⓘ		80y	TEST EPR ZZZ		
▼	TESTTEAM Oneppm ⓘ	947 671 9915	85y	TEST EPR ZZZ		
▼	TESTTEAM Seven ⓘ	999 009 9529	78y	TEST EPR ZZZ		
▼	TESTTEAM Six ⓘ	999 009 4055	89y	TEST EPR ZZZ		
▼	TESTTEAM Three ⓘ		4y	TEST EPR ZZZ		

Actions

The **Actions** section will allow you to carry out the three functions shown above:

- Create a copy
- Edit Custom List
- Handover

Edit

**Edit Custom List** is where you can add/remove patients, share the list and rename the list.

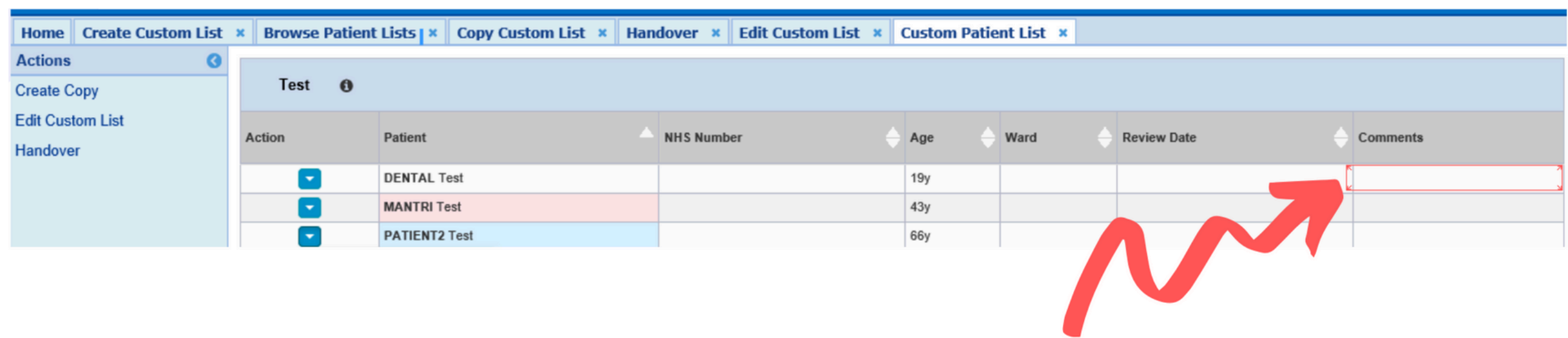
Handover

**Handover** is where you can access the handover for each inpatient.

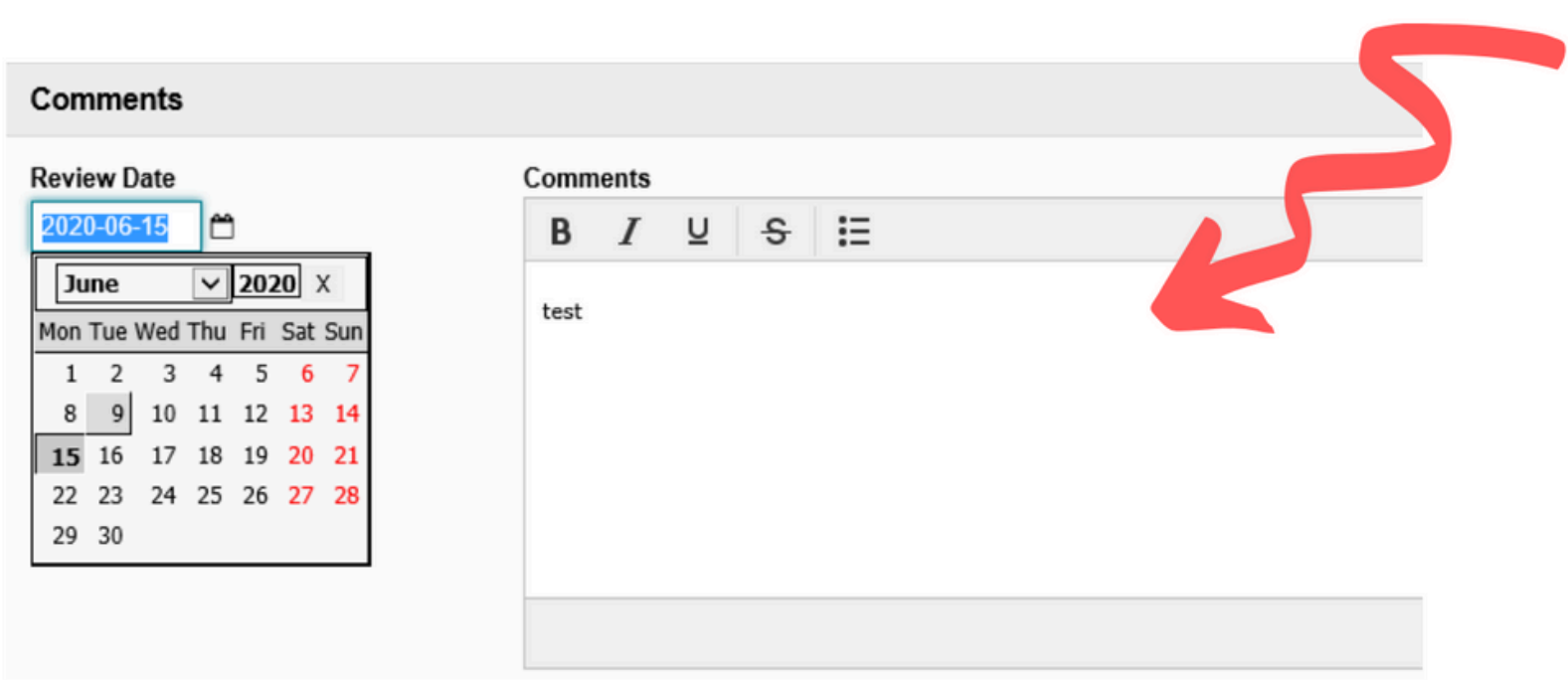
Copy

If you create a **copy** of a shared list then any amendments to that copied list are only for yourself. Amendments on a shared list are reflected for all.

# Comments/Notes

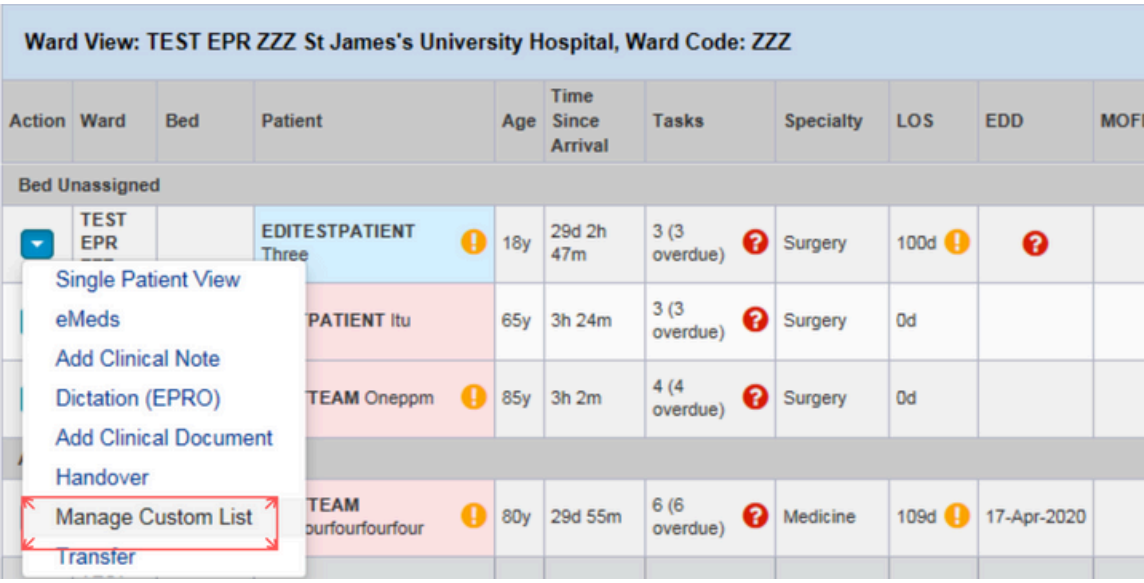
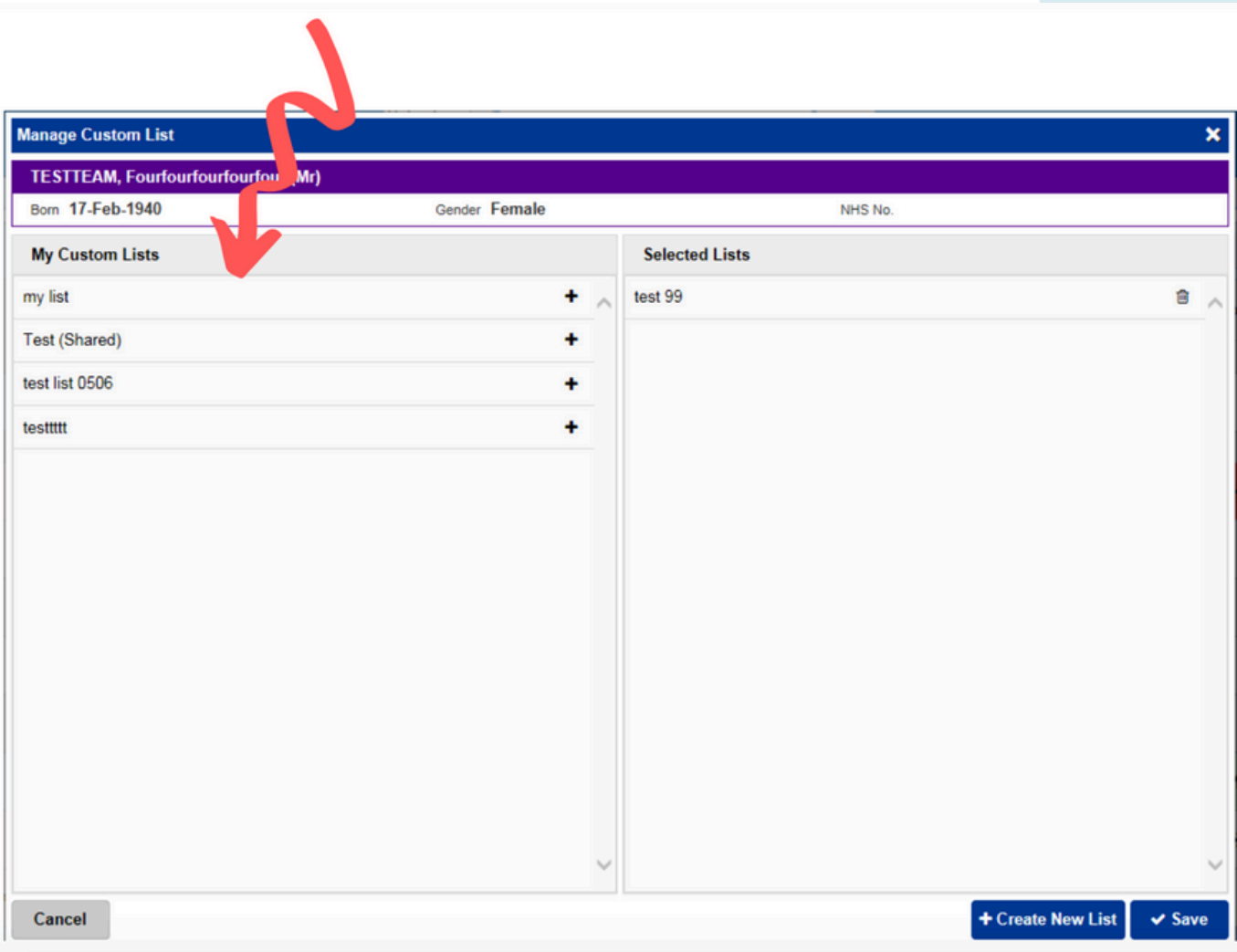
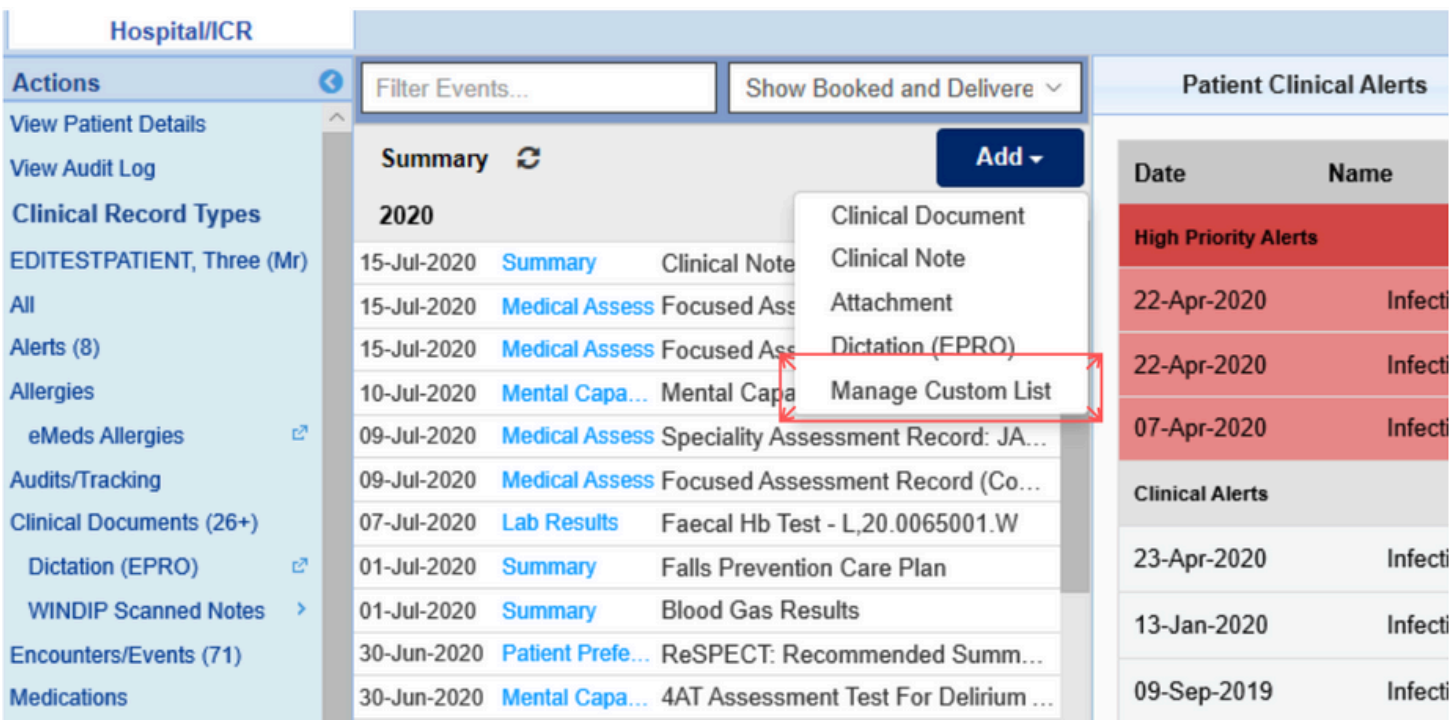


From your Patient List view click on the comments column. This is where you can add comments to the patient and change the review date.



Patient comments are a part of the Patient List, so will not move with the patient if you put the them into a different list. If you then delete the old Patient List, the comments will be deleted.

The functionality to manage Patient Lists can be found from either the ward or single patient view. From there you can add or remove patients from your Patient List.





# Currently Admitted Patient List

Custom View

Category

Currently Admitted Patient List

Name

Enter View Name

Filters

Sharing

Choose Filter Type

Ward Stay Type

Select Ward Stay Type

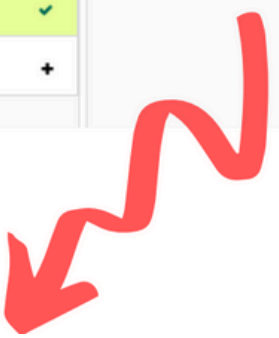
Ward Stay (Inpatient & Daycase)

Ward Attender

Filter Criteria

Ward Stay Type

Ward Stay (Inpatient & Daycase)



## Ward Stay Type

In the category drop down list select **Currently Admitted Patient List**, then select your filter. For the ward stay type you can select **Ward Stay (Inpatient & Daycase)** and/or **Ward Attender**.

Choose Filter Type

Clinical Review

Select Clinical Review

Consultant

Junior Doctor

Nursing

Filter Criteria

Clinical Review

Consultant

Junior Doctor

Nursing

Include

Exclude

## Clinical Review

The next filter you can pick from is **Clinical Review**. This allows you to filter between clinician type (here you can select multiple clinicians). The include/exclude function allows you to filter further.

The screenshot shows a software interface for filtering consultants. On the left, under 'Choose Filter Type', the 'Current Consultant' dropdown is selected. Below it are input fields for 'Name' (containing 'test'), 'Initials', 'GMC', and 'Specialty', with a 'Search' button at the bottom. A list titled 'Select Current Consultant' shows 'A LETTER TEST - Surgery' highlighted in green with a checkmark. On the right, the 'Filter Criteria' panel shows 'Current Consultant' with 'Include' and 'Exclude' buttons, and 'A LETTER TEST - Surgery' listed below.

## Current Consultant


The next filter type is **Current Consultant**. You can search by their **Name**, **Initials**, **GMC** and **Speciality**. You can also use the include and exclude function.

The screenshot shows the 'Current Consultant Speciality' filter interface. On the left, under 'Choose Filter Type', the 'Current Consultant Speciality' dropdown is selected. Below it is a 'Search' field containing 'medicine' and a 'Search' button. A list titled 'Select Current Consultant Speciality' shows 'Audiological Medicine' highlighted in green with a checkmark. A large red arrow points from this highlighted item down towards the next section header. On the right, the 'Filter Criteria' panel shows 'Current Consultant Speciality' and 'Audiological Medicine' listed.

## Current Consultant Speciality

The next filter is **Current Consultant Speciality**, here you can filter by the different specialities.

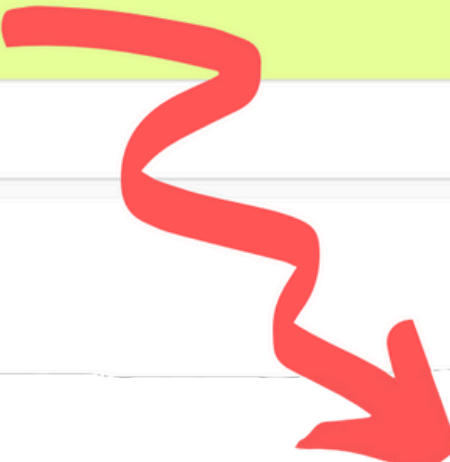
Choose Filter Type	Filter Criteria
<div>Current Ward <input type="checkbox"/></div> <div>Search <input type="text" value="ZZZ"/> <input type="button" value="Search"/></div> <div>Select Current Ward</div> <div><div>TEST EPR ZZZ ✓</div><div>TEST EPR ZZZ1 ✓</div></div>	<div><input type="checkbox"/> Current Ward <input type="button" value="Include"/> <input type="button" value="Exclude"/></div> <div><input type="checkbox"/> TEST EPR ZZZ</div> <div><input type="checkbox"/> TEST EPR ZZZ1</div>



## Current Ward

This filter allows you to select multiple wards. It also gives you the ability to include or exclude additional wards.

Choose Filter Type	Filter Criteria
<div>Recent Admissions To The Hospital <input type="checkbox"/></div> <div>Select Recent Admissions To The Hospital</div> <div><div>Admitted to hospital within 24 hours (1 day) +</div><div>Admitted to hospital within 48 hours (2 days) +</div><div>Admitted to hospital within 72 hours (3 days) ✓</div><div>Admitted to hospital within 96 hours (4 days) +</div></div>	<div><input type="checkbox"/> Recent Admissions To The Hospital</div> <div><input type="checkbox"/> Admitted to hospital within 72 hours (3 days)</div>



## Recent Admissions To The Hospital

This allows you to filter by when the patient was admitted to the hospital. You can select within one, two, three or four days.



# Recently Discharged Patient List

## 1 Ward Stay Type

In the category drop down list select Recently Discharged Patient List, then select your filter. For the ward stay type you can select Ward Stay (Inpatient & Daycase) and/or Ward Attender.

The screenshot shows the 'Custom View' interface. At the top, there's a 'Category' dropdown set to 'Recently Discharged Patient List' and a 'Name' field with 'test 800'. Below this are 'Filters' and 'Sharing' tabs. Under 'Filters', the 'Choose Filter Type' dropdown is set to 'Ward Stay Type'. The 'Select Ward Stay Type' list shows 'Ward Stay (Inpatient & Daycase)' and 'Ward Attender' (which is highlighted with a green checkmark). On the right, the 'Filter Criteria' section shows 'Ward Stay Type' and 'Ward Attender' as active filters.

## 2 Recent Discharges From The Hospital

You can filter by Recent Discharges From The Hospital and then select one, two, three or four days.

The screenshot shows the 'Custom View' interface. The 'Category' is 'Recently Discharged Patient List' and the 'Name' is 'test 800'. Under the 'Filters' tab, the 'Choose Filter Type' dropdown is set to 'Recent Discharges From The Hospital'. The 'Select Recent Discharges From The Hospital' list shows four options: 'Patients discharged from hospital within 24 hours (1 day)', 'Patients discharged from hospital within 48 hours (2 days)', 'Patients discharged from hospital within 72 hours (3 days)' (highlighted with a green checkmark), and 'Patients discharged from hospital within 96 hours (4 days)'. On the right, the 'Filter Criteria' section shows 'Recent Discharges From The Hospital' and 'Patients discharged from hospital within 72 hours (3 days)' as active filters. At the bottom, there are 'Cancel', 'Delete', and 'Save' buttons.

## 3 Discharged From Ward

This filter allows you to select multiple wards. It also gives you the ability to include or exclude these wards.

The screenshot shows the 'Custom View' interface. The 'Category' is 'Recently Discharged Patient List' and the 'Name' is 'test 800'. Under the 'Filters' tab, the 'Choose Filter Type' dropdown is set to 'Discharged From Ward'. The 'Search' field contains 'ZZZ' and the 'Search' button is visible. The 'Select Discharged From Ward' list shows 'TEST EPR ZZZ' and 'TEST EPR ZZZ1' (both highlighted with green checkmarks). On the right, the 'Filter Criteria' section shows 'Discharged From Ward' with 'Include' and 'Exclude' buttons, and 'TEST EPR ZZZ' and 'TEST EPR ZZZ1' as active filters.

This is an example of how you can apply multiple filters to a Recently Discharged Patient List.

Category

Recently Discharged Patient List

▼

Name

test 800

Filters

Sharing

Choose Filter Type

Discharged From Ward

▼

Search

zzz

Search

Select Discharged From Ward

TEST EPR ZZZ

✓

TEST EPR ZZZ1

+

Filter Criteria

Ward Stay Type

Ward Attender

Recent Discharges From The Hospital

Patients discharged from hospital within 24 hours (1 day)

Discharged From Ward

Include

Exclude

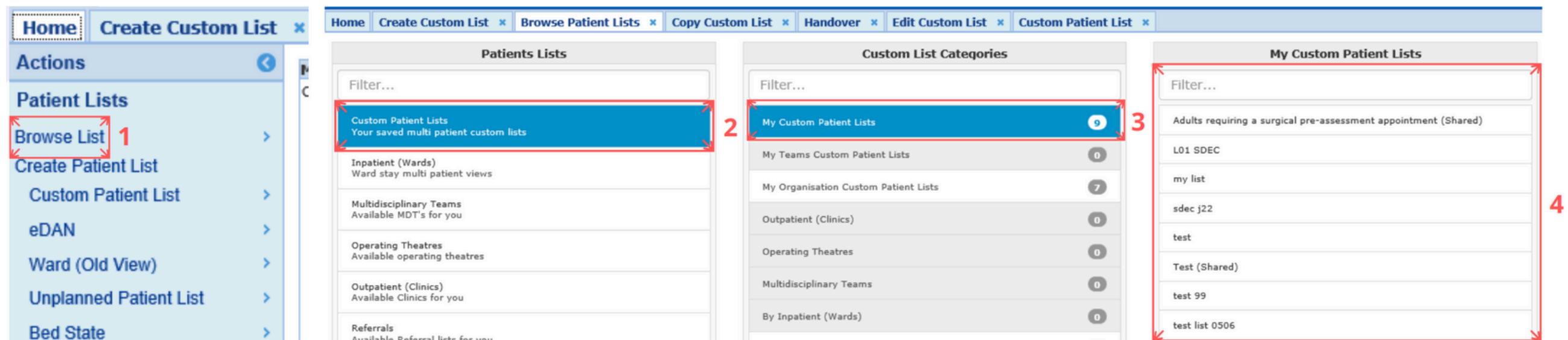
TEST EPR ZZZ

Cancel

Delete

Save

# Finding a Custom Patient List



1

From your PPM+ homepage click on Browse List.

2

From Patients Lists select **Custom Patient Lists**.

3

From Custom List Categories select **My Custom Patient Lists**.

4

From **My Custom Patient Lists** select the relevant list you want to view. (Shared) indicates a list has been shared with you.

# Sharing a Custom Patient List

Filters **Sharing** 5

**Search Contact**

Search: adam smith Search

**Select Contact**

Smith, Adam Charles (Mr) Senior Project Analyst ✓ 6

**Share With**

User(s)

Smith, Adam Charles (Mr) Read List ☒ Edit List ☐ Delete List ☐ 7

Cancel Delete Save 8

5

Click on the **Sharing** tab, search for the colleague or team you want to share your list with. Please note you can only share lists with PPM+ users who have created a contact on PPM+.

6

Click on the plus icon to add your colleague or team. If you add a person or team in error - use the bin icon to remove them.

7

Select the tick boxes next to the user(s) to give them the required permissions.

8

Once you have selected the required permissions, click **Save**.

# Editing a Custom Patient List

Home

Browse Patient Lists x

Custom Patient List x

Actions

Create Copy

Edit Custom List

Handover

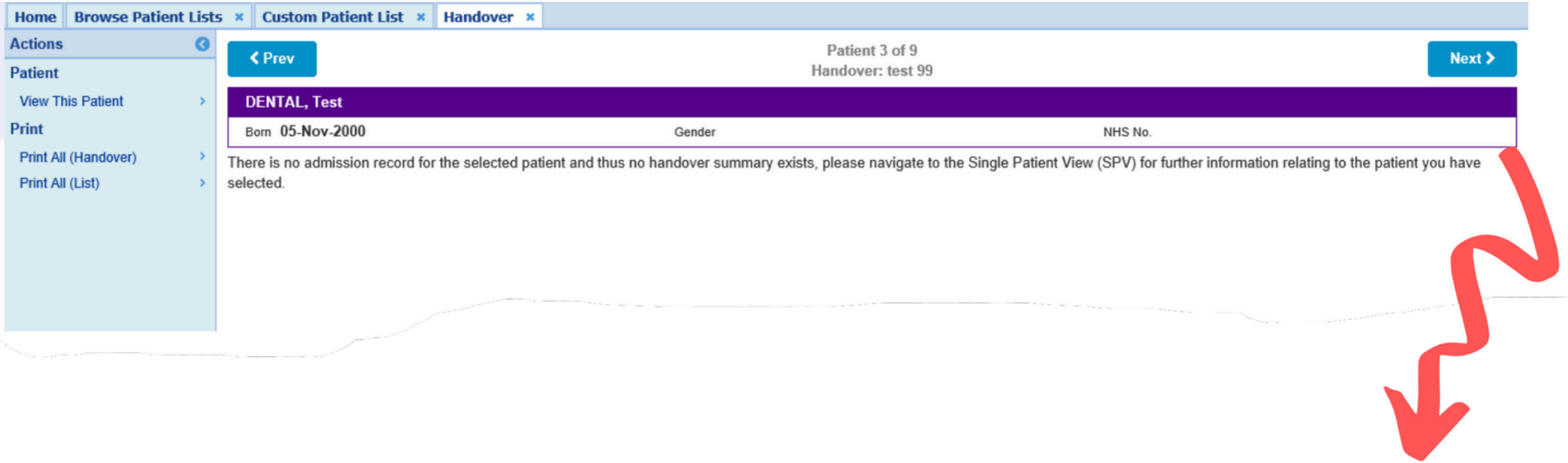
test 99

Action	Patient	NHS Number	Age	Ward	Review Date	Comments
	ANN TEST Ann		80y			
	DENTAL Test		45y			
	DENTAL Test		19y			
	TESTTEAM Five-Five	999 999 9557	34y	LPMI (LGI)		
	TESTTEAM Four		80y	TEST EPR ZZZ		
	TESTTEAM Oneppm	947 671 9915	85y	TEST EPR ZZZ		
	TESTTEAM Seven	999 009 9529	78y	TEST EPR ZZZ		
	TESTTEAM Six	999 009 4055	89y	TEST EPR ZZZ		
	TESTTEAM Three		4y	TEST EPR ZZZ		

From the **Custom Patient List view**, click on **Edit Custom List** located in the **Actions** section on the left hand side.



# Handover Tips



A patient on your list, who is not an inpatient, will not have any handover comments displayed. This is shown above.

Print Preview							
Bed	Patient	Age	Clinical Summary	Handover Comment	Medical Jobs	Observation	Observation Due
	TESTTEAM Oneppm	85y	[Comment A added on zzz]	[Comment A added on zzz]	[Comment A added on zzz]		19h 53m (every 15m)
Bed 1	TESTTEAM Oneppm	85y				12 (3)	170h 8m (hourly)
Bed 5	TESTTEAM Three	4y					1533h (every 15m)
Bed 6	TESTTEAM Four	80y	test	test		2 (7)	207h 38m (4 hourly)
Bed 8	TESTTEAM Six	89y	Test	Test gfgd		13 (2)	1124h 20m (hourly)

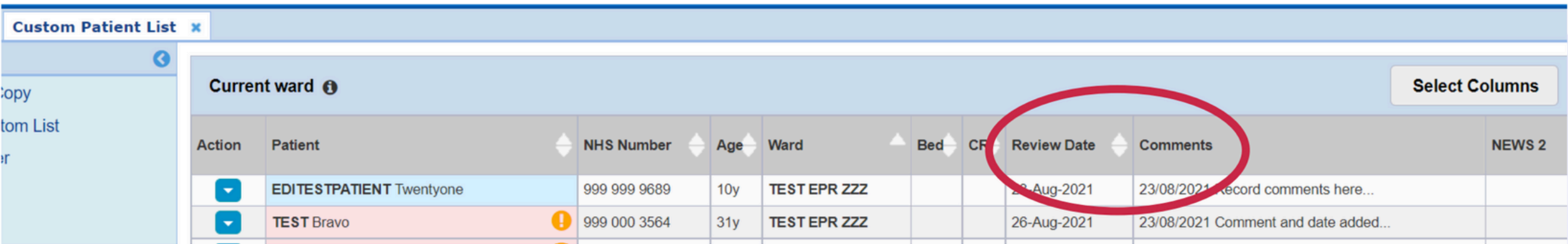
Printing of Custom Patient Lists is not advised by the Trust, if you decide to print your Custom Patient List via the handover page, please be aware that only patients admitted to a ward will be visible.

For further information on handovers, see the user guide by clicking [here](#) or by visiting the PPM+ Helpsite at <https://www.ppmsupport.leedsth.nhs.uk/>

# Important Information for All Custom Patient List Users

Please be aware that any information recorded in the **Comments** and **Review Date** columns of a Custom Patient List is not automatically deleted when the patient is removed from the list.

If the patient is added back onto that Custom Patient List at a later date, any historical information in those two columns will re-populate.



Custom Patient List									
Current ward ⓘ									
Select Columns									
Action	Patient	NHS Number	Age	Ward	Bed	CF	Review Date	Comments	NEWS 2
<input type="checkbox"/>	EDITESTPATIENT Twentyone	999 999 9689	10y	TEST EPR ZZZ			23-Aug-2021	23/08/2021 Record comments here...	
<input type="checkbox"/>	TEST Bravo	999 000 3564	31y	TEST EPR ZZZ			26-Aug-2021	23/08/2021 Comment and date added...	

To mitigate the potential clinical risk, it is advised that information recorded in the Comments and / or Review Date column is either:

- Dated if the information is required to re-populate
- or
- Deleted PRIOR TO removing the patient from the list.

# 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.

**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/>**