



The Leeds
Teaching Hospitals
NHS Trust

ppm+

Specialist Referrals

USER GUIDE



#LeedsDigitalWay

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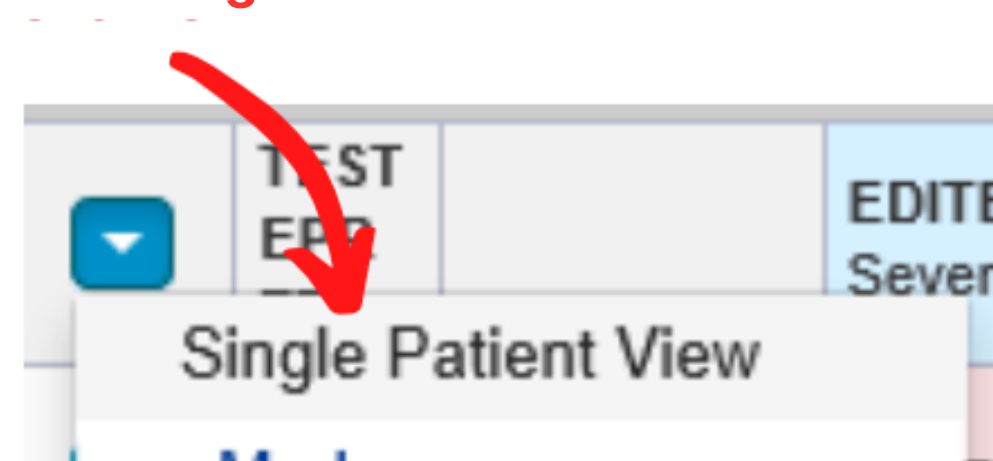
For further information please contact:

 leedsth-tr.ImplementationTeam@nhs.net or  0113 206 0599

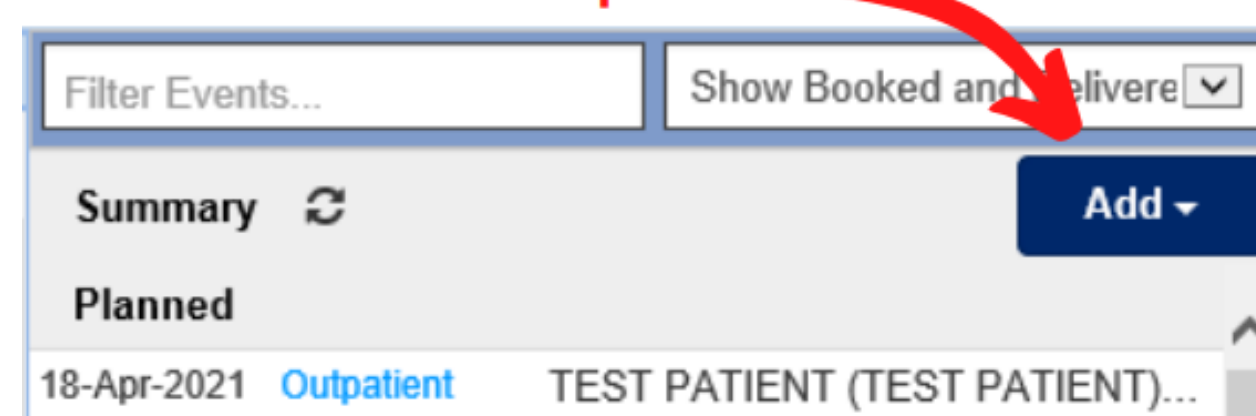
How to add a Specialist Referral

- 1 Go into '**Single Patient View**' and select your patient, then on the left click the 'Add' button drop down.

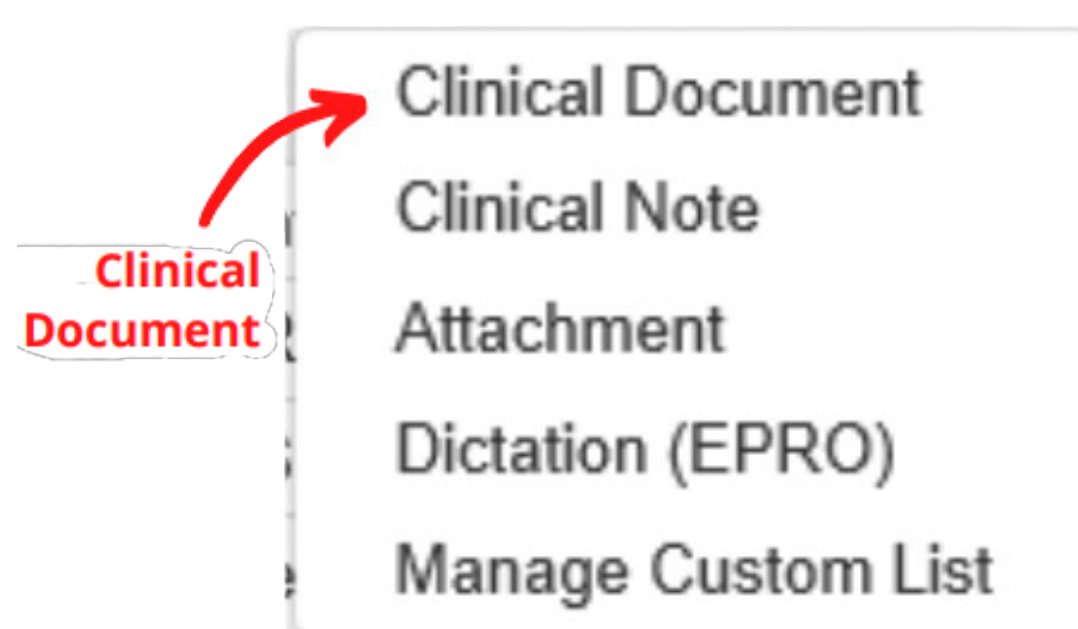
Single Patient View



Add Drop down

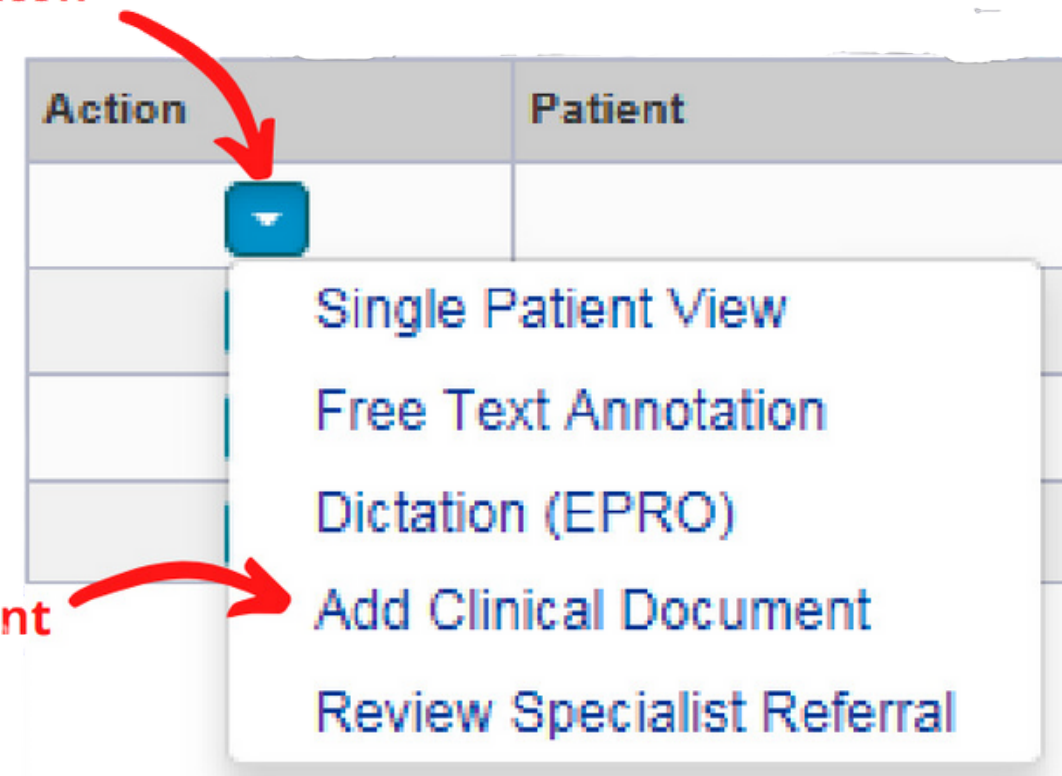


- 2 Click the '**Clinical Document**' option in the drop down menu.



- 3 You can also do this from your ward view by clicking the '**Action**' button and then clicking '**Add Clinical Document**'.

Action Button



Add Clinical Document

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Search for '**Specialist Referral**' in the filter section at the top or scroll to find the eform you require.

The left screenshot shows the 'Add Document' window with a search bar containing 'Specialist Referral'. Below the search bar are filters for 'Show All' and 'Sort By Favourites'. The right screenshot shows the search results with 'Specialist Referral' at the top, marked with a star icon, and a 'Referral' link. A red arrow points to the 'Specialist Referral' text with the label 'Specialist Referral option'.

5

You can favourite a specialist referral option by selecting the **star** in the centre and once favourited it will appear at the top of your list.

The screenshot shows a list of search results. 'Specialist Referral' is at the top, marked with a yellow star icon and a 'Referral' link. Below it is '4AT Assessment Test For Delirium And Cognitive Impairment', marked with a grey star icon and an 'Other Assessments' link. A red arrow points to the yellow star with the label 'Favourited', and another red arrow points to the grey star with the label 'Not Favourited'.

6

Once you click on Specialist Referrals, this form will be presented. Search for the team you want to refer to and the teams will appear to choose from. Once selected click '**continue**' this will load the referral form for that service and team.

The screenshot shows the 'Specialist Referral' form. At the top, it displays patient information: 'EDITESTPATIENT, Seven', 'Born 16-May-2003 (17y 10m)', 'Gender Male', 'NHS No. 999 999 9522', 'Address St. James's University Beckett Street Leeds, LS9 7TF', and 'PAS No. 4999917'. Below this is the 'Referral To' section, which includes a 'Referral To Team' dropdown menu with a search bar. A red arrow points to the dropdown menu with the label 'Referral to drop down'. At the bottom right, there is a green 'Continue' button, with a red arrow pointing to it labeled 'Continue button'.

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Next you will need to fill of the 'Referral From' form. See below the screenshot for the generic fields in every referral request form and the details of filling it out:

- Those with a **red *** are required fields.
- The date and time will auto populate.
- The **'Referred By'** option will auto populate with the users name.
- The **'Referrer's Contact Details'** is an optional box for your referrers contact details.
- In the **'Referral From Team'** search for your team/ward and select the appropriate option from the list.

(Your team will only be selectable if it has been created in ppm+)

- The **'Referral Reason'** is an open text box in which each team will require certain information to be documented. Please liaise with the appropriate team for this information.

The screenshot displays two sections of a form. The top section, titled 'Referral From', contains four fields: '*Date of Referral' (with a calendar icon and a date of 2021-04-27), '*Time of Referral' (with a time of 13:54:00 and a format hint 'Format HH:mm:ss'), 'Referred By' (which is empty), and 'Referrer's Contact Details' (which is empty). Below these is a '*Referral From Team' dropdown menu with the placeholder text 'Type to search'. The bottom section, titled 'Referral Reason', contains a large, empty text area for documentation.

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8

Once submitted, a copy of the referral is saved in the patients Single Patient View. This referral document is updated when any changes or comments that are made during the review process.

9

Once you have requested your referral, if it is still in the requested stage i.e. not been accepted or declined you can edit or withdraw that referral. *(The edit and withdraw options will no longer be available once the referral has progressed past the requested stage)*

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eWhiteboards and Multi Patient View

- 1 You can view the status of a Specialist Referral for inpatients on your **eWhiteboard** and as a selected column in your **Multi Patient View**.

Patient	Specialist Referrals
TEST Beryl	OT:Dis, SLT:R, SLT:Dis, OT:W

- 2 If there are a number of referrals the Team abbreviation will be replaced by a **number** indicating the number of referrals in that status.

Patient	Specialist Referrals
TESTER Gary	3:R, 3:W, 1:A, 1:Dis

Number



- 3 In your **Multi Patient View** you can hover over the information in the column to see further details.

Patient	Specialist Referrals
	07-Nov-2017 Speech & Language Therapy (Respiratory) (SLT) : Withdrawn 07-Nov-2017 Occupational Therapy (OT) : Requested 29-Sep-2017 SLT (SLT) : Declined
TEST Beryl	OT:R, SLT:W
TESTER Gary	3:R, 3:W, 1:A, 1:Dis



eWhiteboard/MPV Abbreviations

An acronym of the team referred to is followed by the status of the referral. The status can be identified by using the key to the right.

R = Requested
W = Withdrawn
S = Seen
A = Accepted
Dec = Declined
Dis = Discharged
RD = Redirected

For further information please contact:

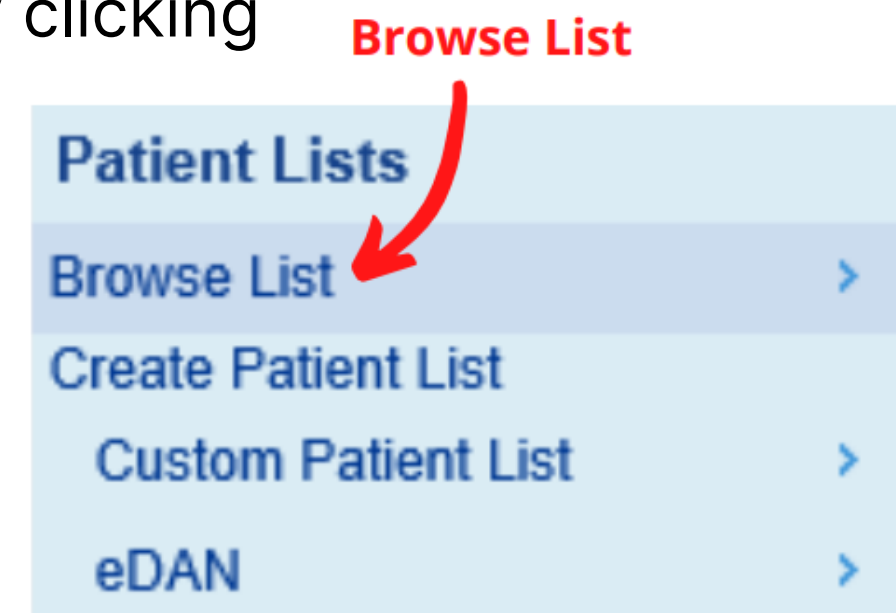
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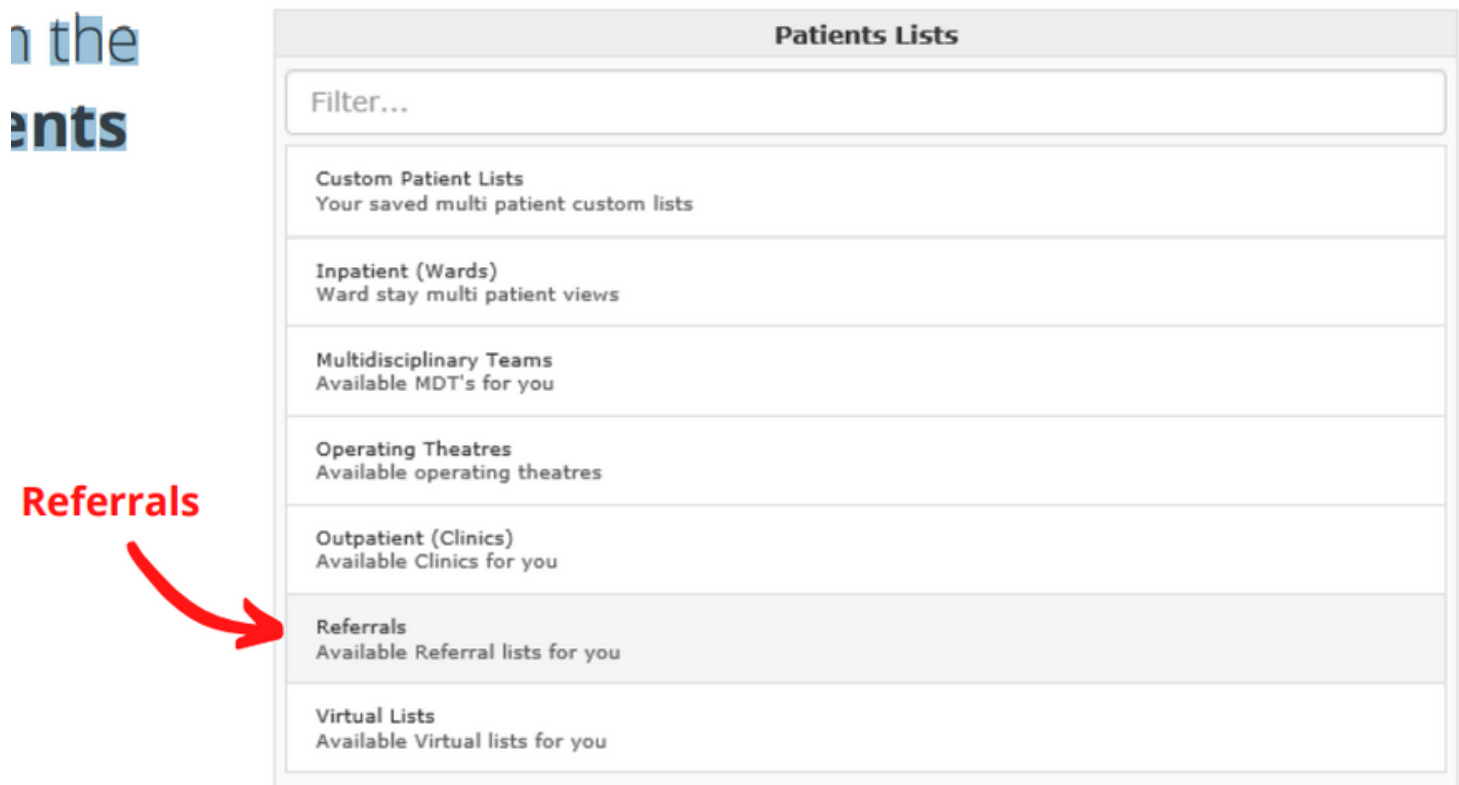
Reviewing a Specialist Referral

Finding your teams Specialist Referrals List

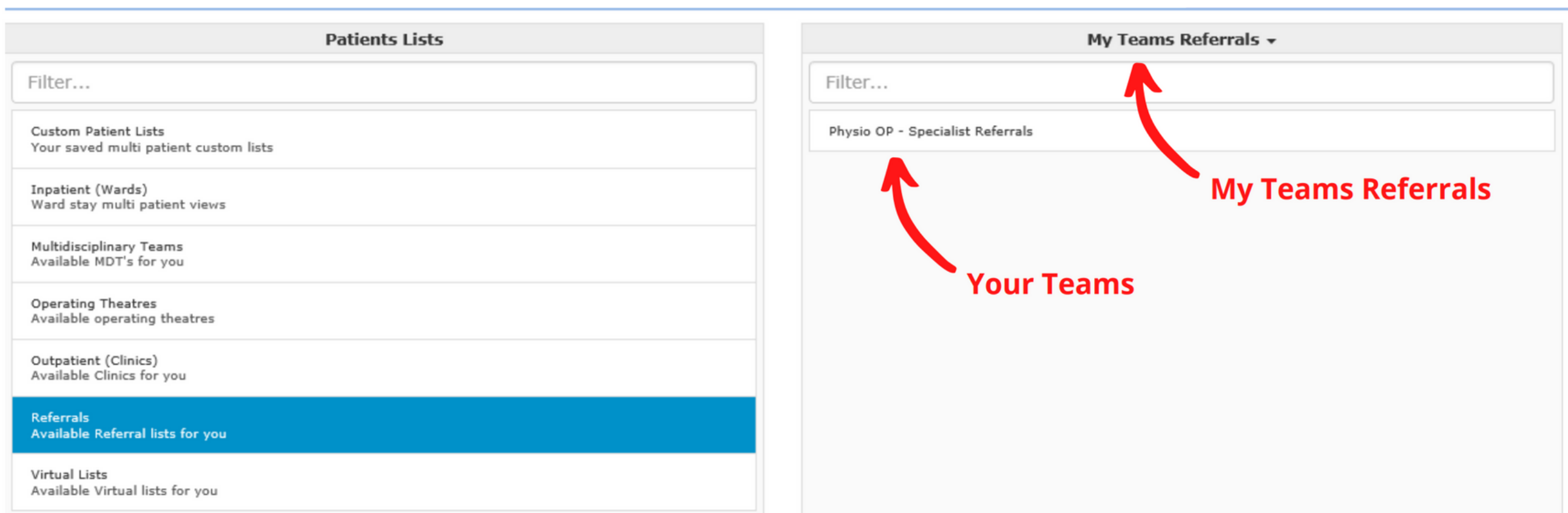
- 1 First find your teams specialist referrals list by clicking **'Browse List'** from the homepage of ppm+.



- 2 Click **'Referrals'** from the options on the **'Patients Lists'** selection.



- 3 If you are already in a team it should automatically load the **'My Teams Referrals'** list with your team in the list.



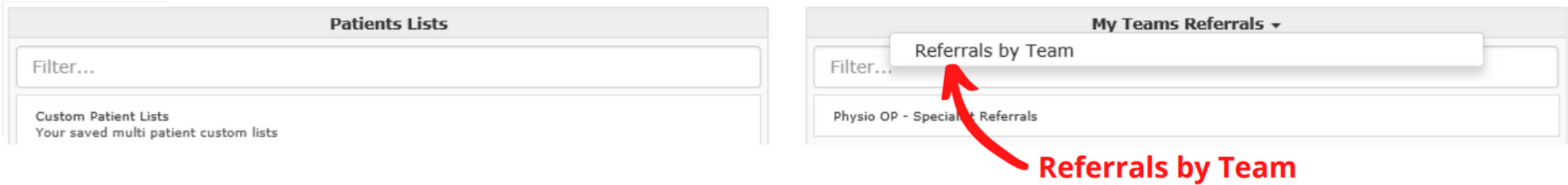
For further information please contact:

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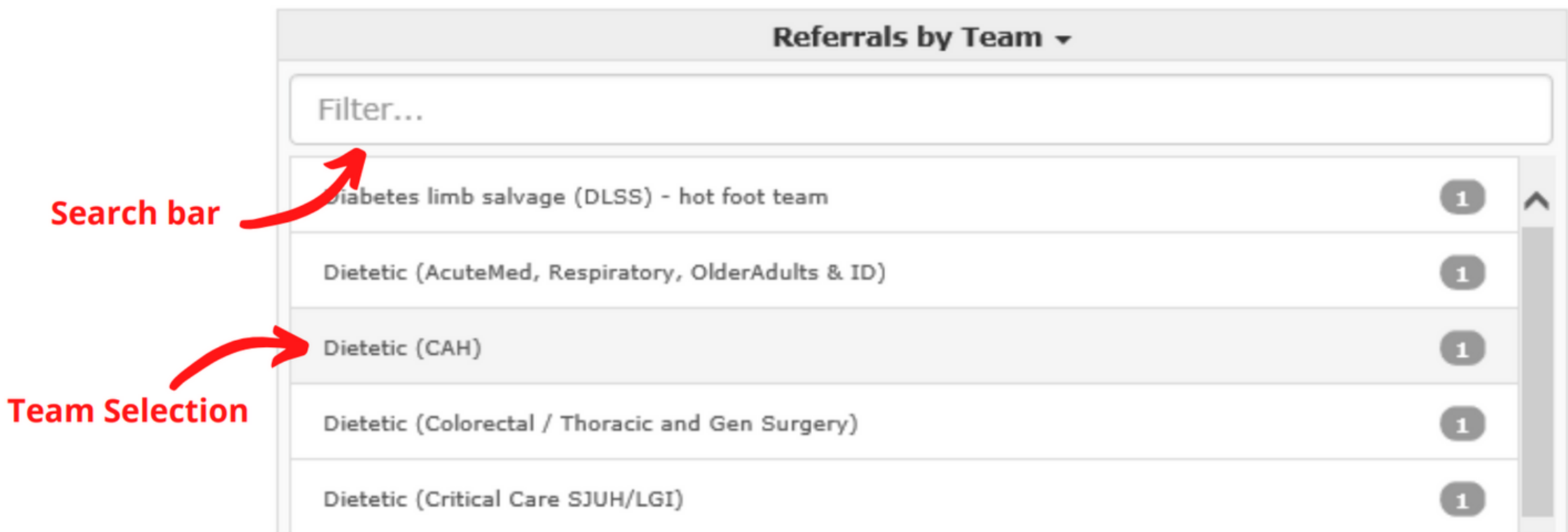
4

If you click on the drop down arrow on **'My Teams Referrals'** you can then switch to **'Referrals by Team'** to view teams you are not a part of. You will have view only access to all the teams but and can only review the teams you are a full member of.



5

If **'Referrals by Team'** is automatically displayed when you first load up you will not be a part of any teams and will need to be request to be added into your team.



6

Once you have selected your team from the list, you will then see your 6 teams referrals page.

Referral List

Speech & Language Therapy (Respiratory) - Specialist Referrals											
Action	Patient	Age	Ward	LOS	EDD	Status	Assigned To	Urgent	Ref Priority	Referred	Next Review Due
☐		68y	TEST EPR ZZZ		08-Sep-2016	Requested				7d 3h 36m	
☐		68y	TEST EPR ZZZ		08-Sep-2016	Requested				22h 42m	
☐		68y	TEST EPR ZZZ		08-Sep-2016	Requested				7d 3h 18m	
☐		68y	TEST EPR ZZZ		08-Sep-2016	Requested				7d 3h 2m	

Showing 1 to 4 of 4 entries

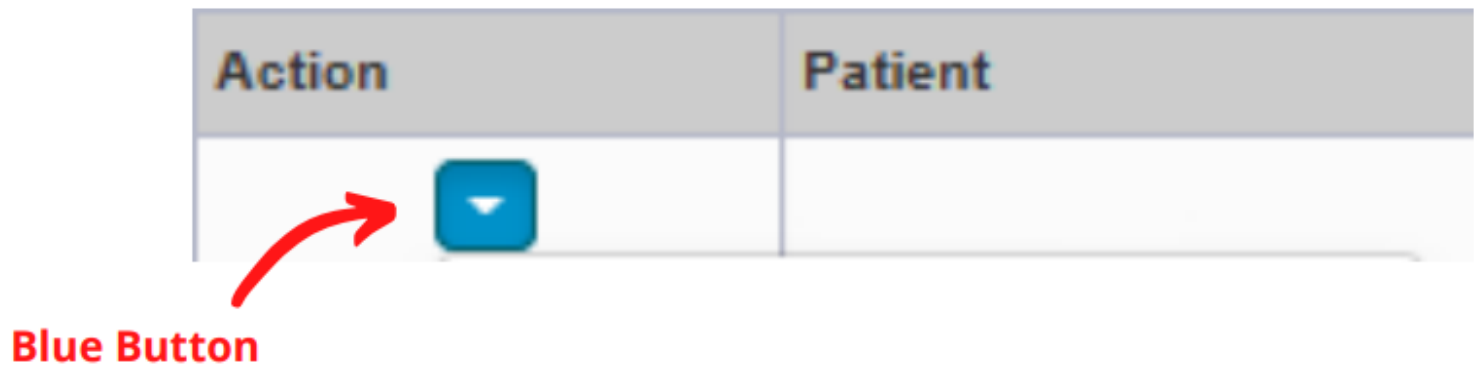
For further information please contact:

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Reviewing a Specialist Referral

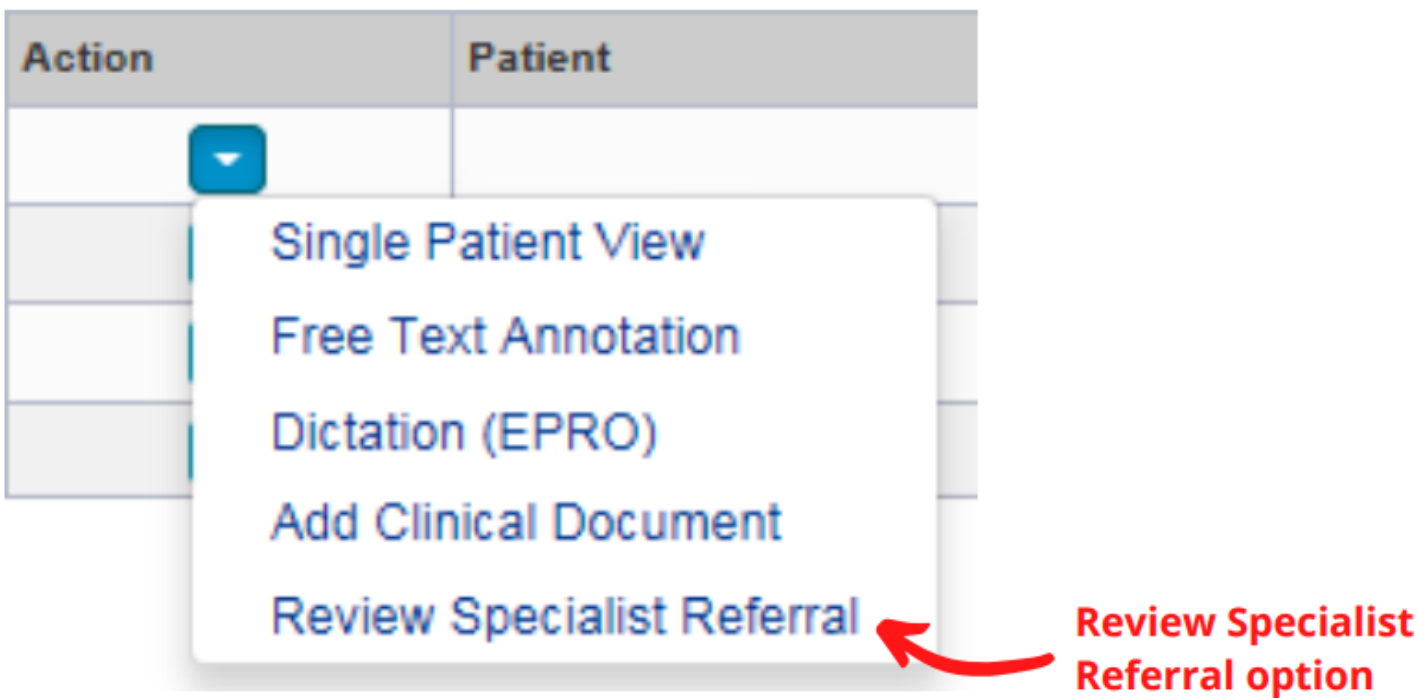
- 1

First click the blue button with the white arrow in the **'Actions'** column for your desired patient.



- 2

Click **'Review Specialist Referral'** from the drop down list.



- 3

Once the form opens you can either **'Accept'**, **'Decline'** or **'Redirect'** the referral as well as add comments.

Accept, Decline or Redirect

4

If you select 'Accept' extra options will appear.

Receiving Service Decision

Date of Decision: 13-Nov-2018
Time of Decision: 10:23:00
Reviewed By:
*Decision:
Assign To:
Priority:
Seen:
Discharge:
Comments:

 Unsaved changes

5

When you select '**Accept**' you will have the optional '**Assign To**' and '**Priority**' sections appear.
(The '**Priority**' option allows you to select 'Low', 'Medium' or 'High' priority which will update the priority column on the referral list)

*Decision:
Assign To:
Priority:

('Assign To' allows you to assign a member of the team to that patient, this will update the 'Assign To' column on your referral list)

If you assign a member of the team to the patient you can then filter to their list of patients back on the teams referrals page. The teams referrals page can be sorted in order of any column via the arrows in the column headers

Physio OP - Specialist Referrals										
Action	Patient	Age	Ward	LOS	EDO	Status	Assigned To	Ref Priority	Referred	Next Review Due
	EDITEPATIENT Seven	17y	TEST EPR ZZZ	336d		Accepted	COOKLAND, Drew (Mr) PISO		101d 3h 17m	

Showing 1 to 1 of 1 entries

6

In the '**Seen**' section if you select '**Yes**' more options appear, the '**date seen**' and '**time seen**' boxes are mandatory and will auto populate but can be changed if necessary, you can input the '**Next Review Date**' but it is not mandatory.

Seen:
*Date Seen:
06-May-2021
*Time Seen:
Format HH:mm:ss
Next Review Date:
Format yyyy-MM-dd

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7

The **'Discharge'** option is a simple Yes/No answer and does not produce further fields to fill out. If you select Yes and complete the form the patient will be removed from your referrals list.

Discharge

NoYes

8

If you select **'Decline'** the **'Comments'** box becomes mandatory but no extra options will appear. Please state the reason for Declining in the comments box.

Receiving Service Decision

Date of Decision06-May-2021

Time of Decision11:33:00

Reviewed ByCOOKLAND, Drew (Mr)

* Decision

AcceptDeclineRedirect

* Comments

9

If you select 'Redirect' beneath the 'Decision' option a notice will appear advising on where to go next.
(You can only redirect a referral at the point of request, once accepted by a team it can no longer be redirected)

Receiving Service Decision

Date of Decision05-May-2021

Time of Decision09:46:00

Reviewed ByCOOKLAND, Drew (Mr)

* Decision

AcceptDeclineRedirect

Please note

Please choose a team in the 'Redirect to Team' field above or cancel and retry to change your selection

* Comments

10

If you follow the notice instructions you will scroll up to the top of the page and choose a team in the '**Redirect to Team**' field in order to move forward with the redirection.

(You can only redirect to teams within the same service)

Redirect To

*Redirect To Team

Physio OP - OP

You cannot select the same team or one that is unrelated to the original referral

11

Once all required fields are correctly filled out you can select '**Submit**' or you can select '**Save Draft**' if you aren't quite finished and need to come back to it later.

Cancel

Unsaved changes

Save Draft

Submit

Save Draft

Submit

12

Once a referral has been submitted you will be able to view the updated referral in the '**Single Patient View**' and the updated status in the '**eWhiteboard Column**' and the 'Referral List'.

Filter Events...

Show Booked and Delivered

External Document

Details

Summary

Add

Expand

Edit

Withdraw

2018

13-Nov-2018

Referral

Referral Requested - Occupational...

13-Nov-2018

Consent Form

Agreement to Investigation or Treat...

13-Nov-2018

Consent Form

Adults who Lack the Capacity to Co...

Specialist Service Referral

Specialist Referral

For further information please contact:

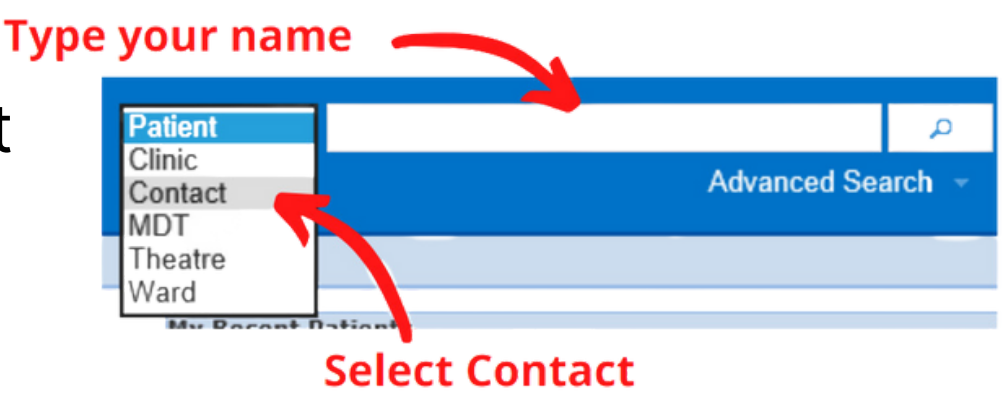
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Adding members to your team

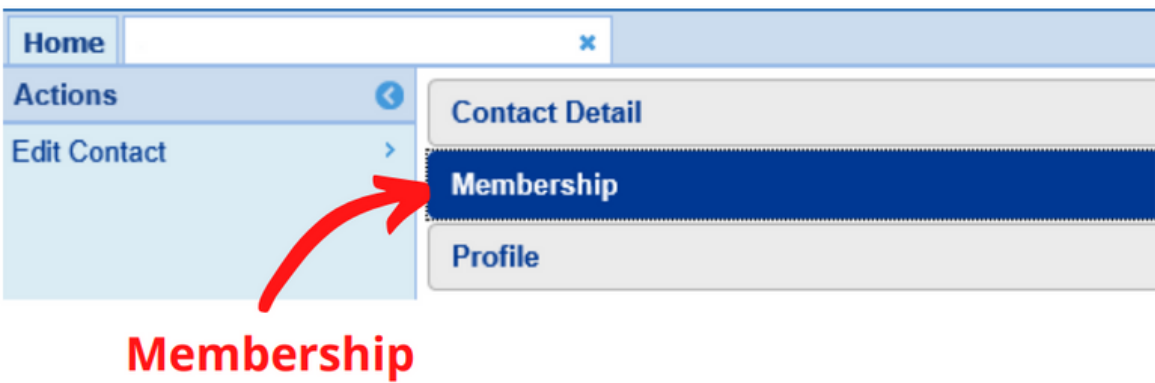
Disclaimer

Only current team members can add other users to the team, you can not add yourself to a team.

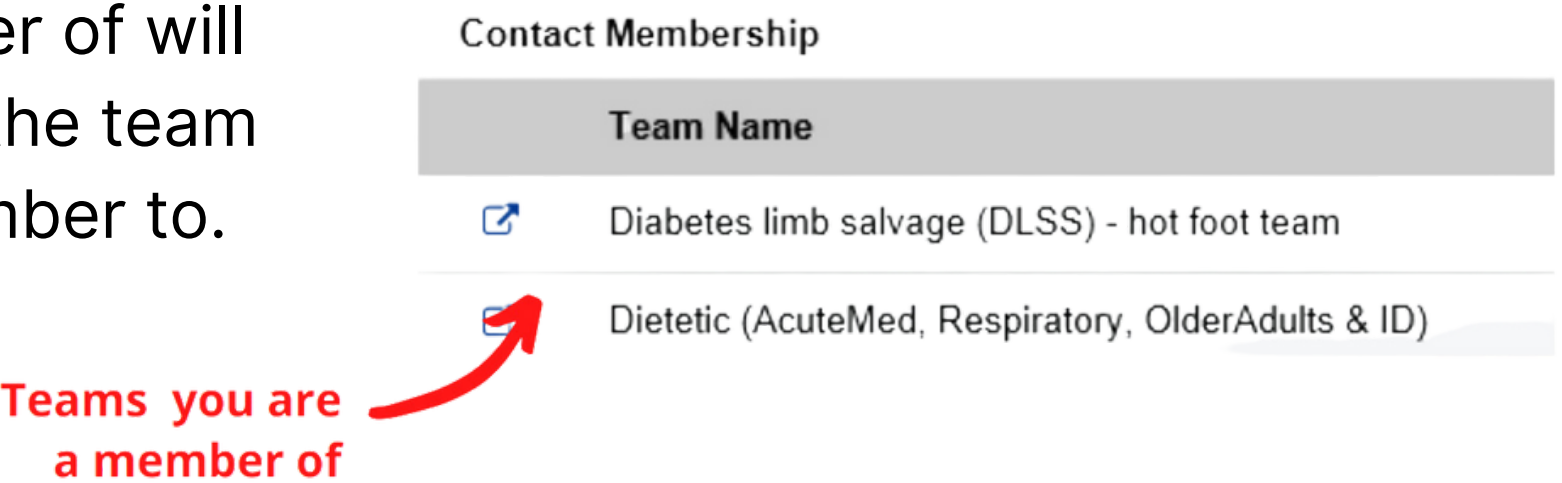
- 1
- On the homepage use the drop down to select **'Contact'** and search for your name as it displays in your contact information.



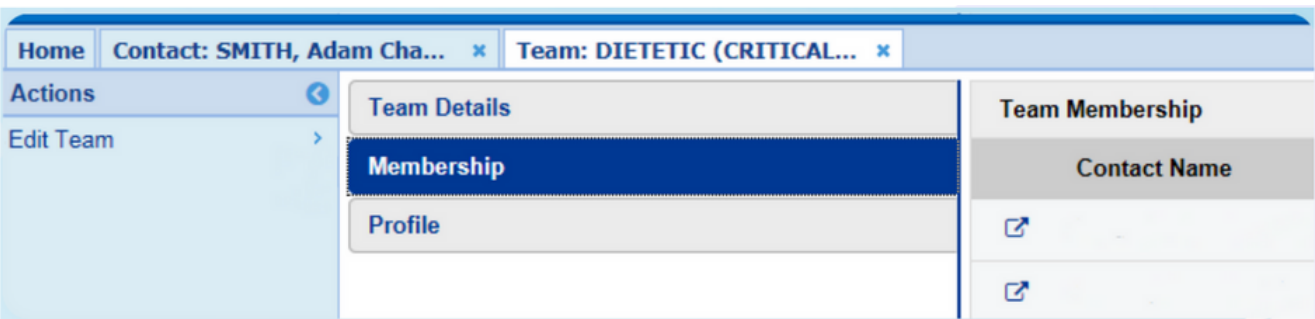
- 2
- Your contact information will appear in a new tab. Select the second option **'Membership'**.



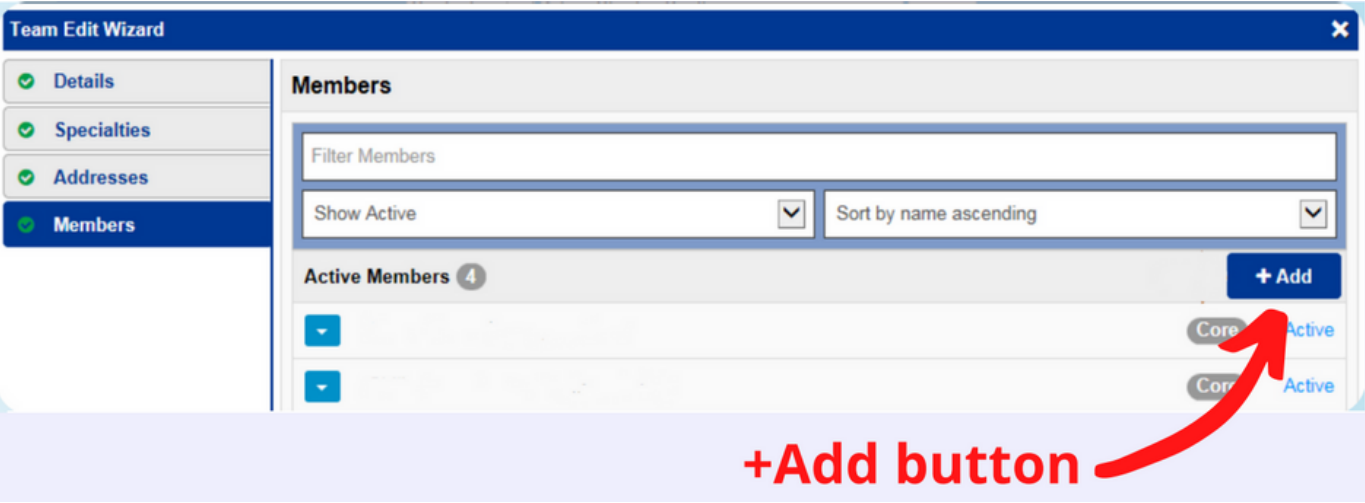
- 3
- The teams you are a member of will display on the right. Select the team you would like to add a member to.



- 4
- The Team tab will appear and be automatically selected. Select the option **'Membership'**. Select **'Edit Team'** from the Actions column on the left.



- 5
- The Team Edit Wizard pop up will appear. Click on **'+Add'**.

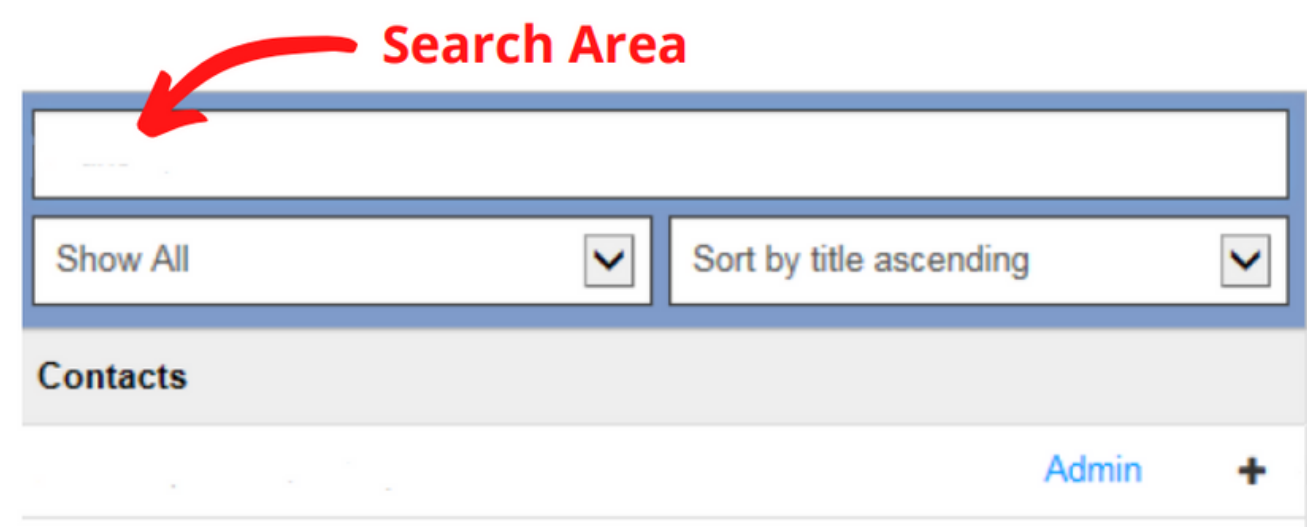


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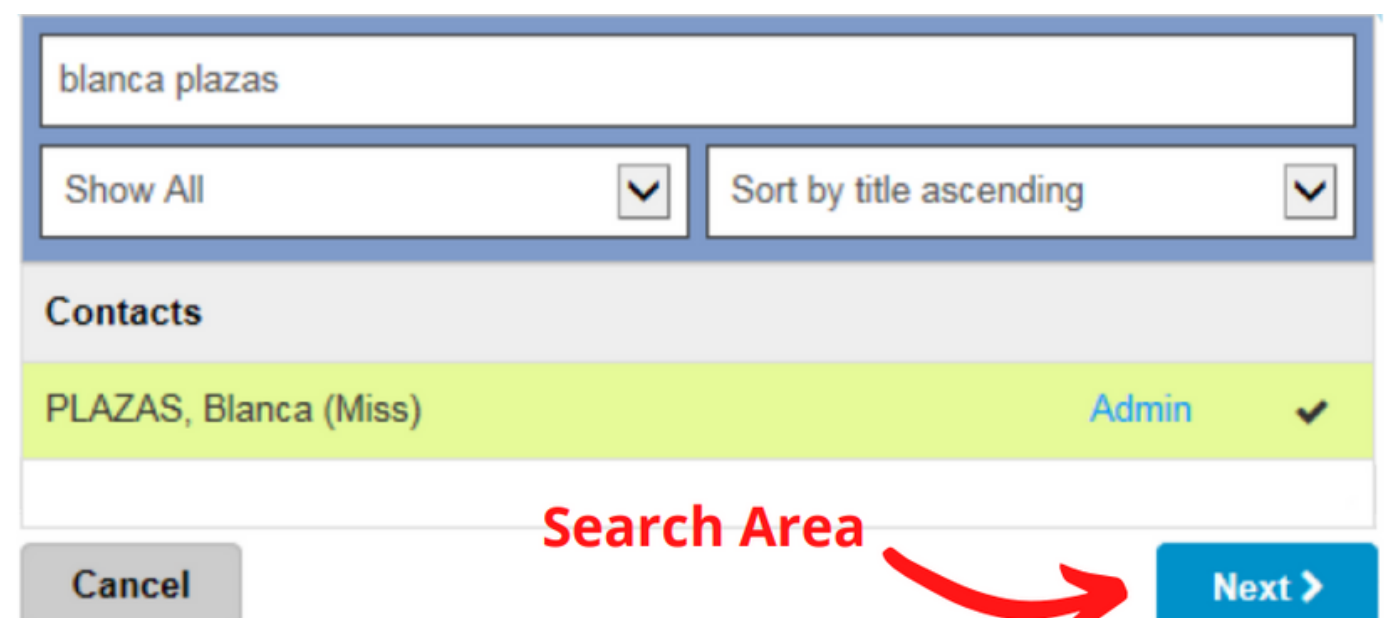
☎ 0113 206 0599

- 6 Search for the colleague you want to add to the team. Click on the '+' next to their name in the list.



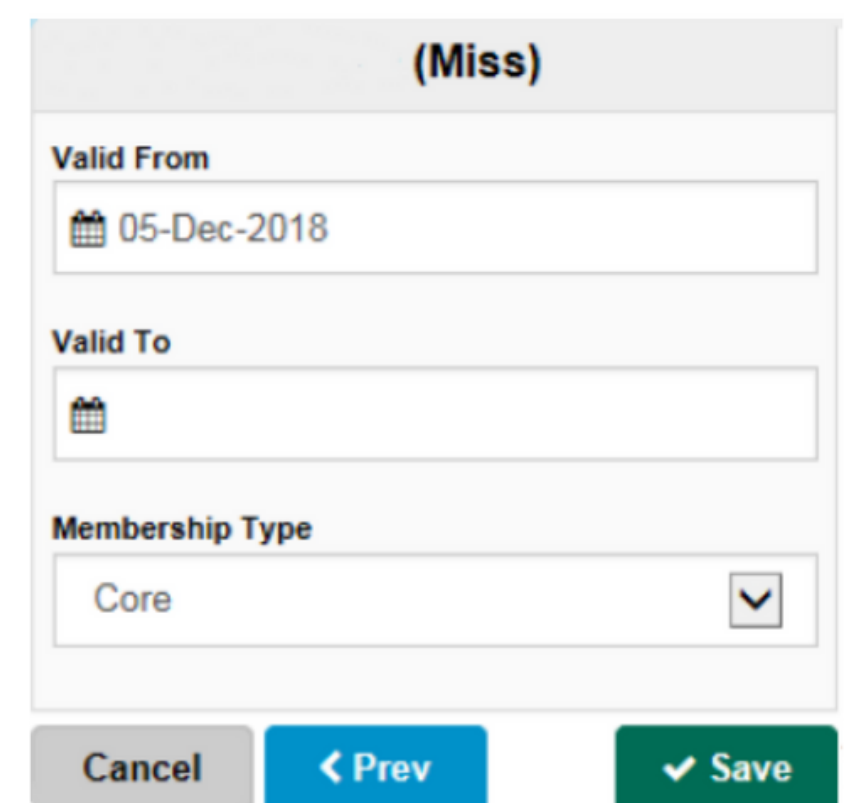
The screenshot shows a search interface with a search bar at the top. Below it are two dropdown menus: 'Show All' and 'Sort by title ascending'. A table titled 'Contacts' is displayed below the filters. The table has a single row with the name 'Admin' and a '+' icon next to it. A red arrow points to the search bar with the label 'Search Area'.

- 7 The individual will be highlighted and the '+' will turn in to a tick. Click on 'Next' in the bottom right corner.



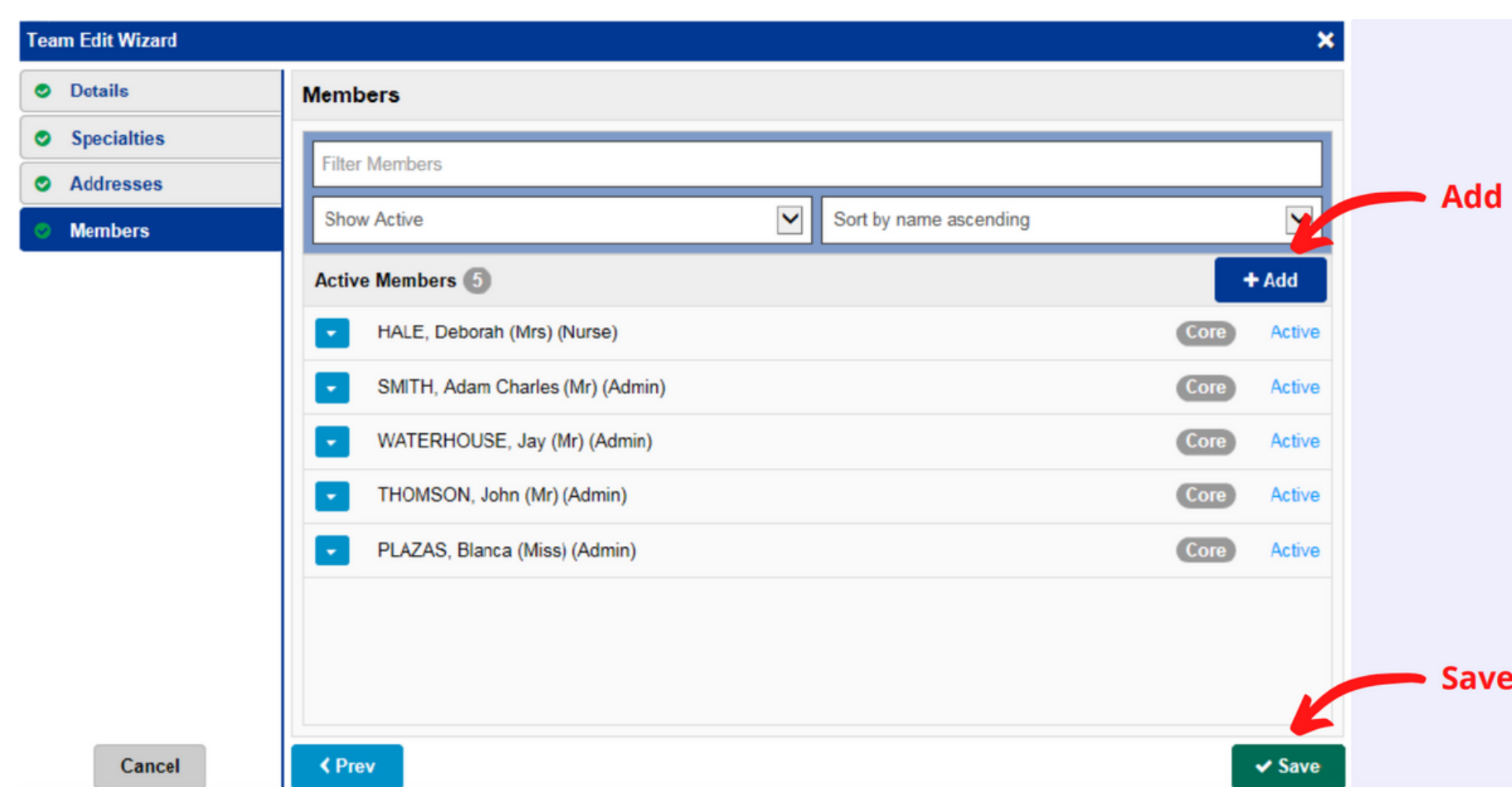
The screenshot shows the same search interface as before, but now the search bar contains the text 'blanca plazas'. The 'Contacts' table has one row highlighted in green: 'PLAZAS, Blanca (Miss)' with 'Admin' and a checkmark icon next to it. At the bottom, there are 'Cancel' and 'Next >' buttons. A red arrow points to the search bar with the label 'Search Area'.

- 8 In the next pop up, leave '**Valid To**' blank and click '**Save**' in the bottom right corner.



The screenshot shows a pop-up form titled '(Miss)'. It has two date fields: 'Valid From' (05-Dec-2018) and 'Valid To' (blank). Below these is a 'Membership Type' dropdown menu set to 'Core'. At the bottom, there are 'Cancel', '< Prev', and '✓ Save' buttons.

- 9 You will now see your selected colleague in the members list. You can add more colleagues by clicking '+Add' and repeating the steps. Once complete remember to click '**Save**' in the bottom right.



The screenshot shows the 'Team Edit Wizard' window with the 'Members' tab selected. It displays a list of active members: HALE, Deborah (Mrs) (Nurse), SMITH, Adam Charles (Mr) (Admin), WATERHOUSE, Jay (Mr) (Admin), THOMSON, John (Mr) (Admin), and PLAZAS, Blanca (Miss) (Admin). Each row has a checkbox, a 'Core' status, and an 'Active' status. A '+ Add' button is at the top right of the list. At the bottom, there are 'Cancel', '< Prev', and '✓ Save' buttons. Red arrows point to the '+ Add' button with the label 'Add' and to the '✓ Save' button with the label 'Save'.

For further information please contact:

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Useful contacts

Implementation Team

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



Ext: 60599



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.



x26655



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

If you would like to make a **Request For Work to PPM+**, [Click Here](#) to be taken to the required page on the Trust's intranet

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:



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