



The Leeds  
Teaching Hospitals  
NHS Trust

ppm+

# Patient Wellness Assessment

USER GUIDE



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CONNECTS • TRANSFORMS • IMPROVES

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# How to complete the Patient Wellness observation if the patient is able to self advocate?

**This assessment must be completed every 24 hours. If the Patient Wellness check has already been completed within this timeframe, please select 'No' and ensure a clinical note is documented accordingly.**

1

If you select **Yes** to **Is the Patient able to self-advocate**, you will need to answer the follow questions accordingly.



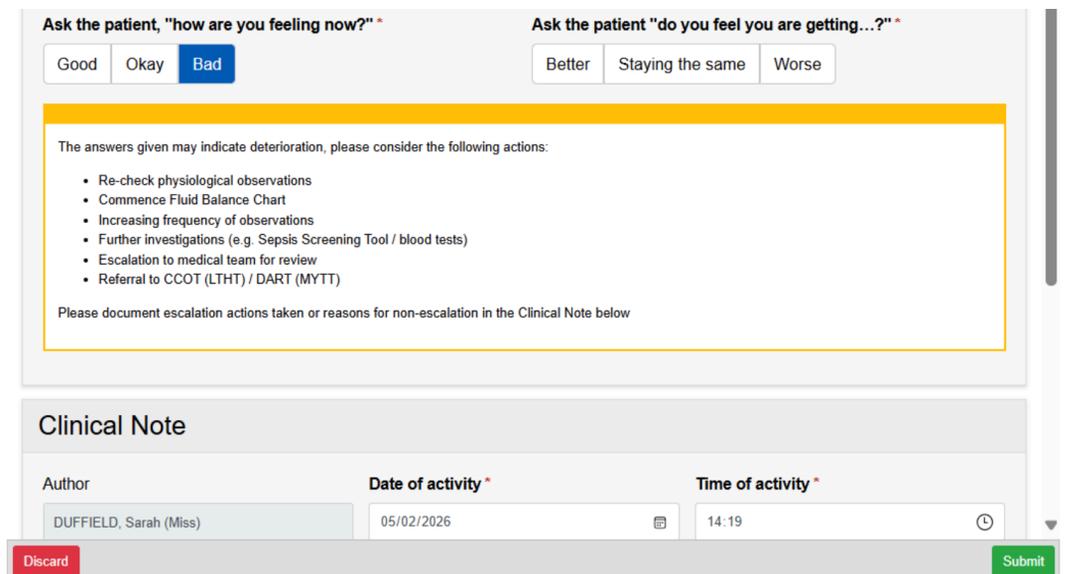
Patient Wellness Assessment

Is the patient able to self-advocate?

No Yes

2

**Ask the patient, how are you feeling now?** If they answer **Bad** then you will notice **advice label regarding the next course of action** that may be required. A **Clinical Note** will also be required to be completed.



Ask the patient, "how are you feeling now?"

Good Okay **Bad**

Ask the patient "do you feel you are getting...?"

Better Staying the same Worse

The answers given may indicate deterioration, please consider the following actions:

- Re-check physiological observations
- Commence Fluid Balance Chart
- Increasing frequency of observations
- Further investigations (e.g. Sepsis Screening Tool / blood tests)
- Escalation to medical team for review
- Referral to CCOT (LTHT) / DART (MYTT)

Please document escalation actions taken or reasons for non-escalation in the Clinical Note below

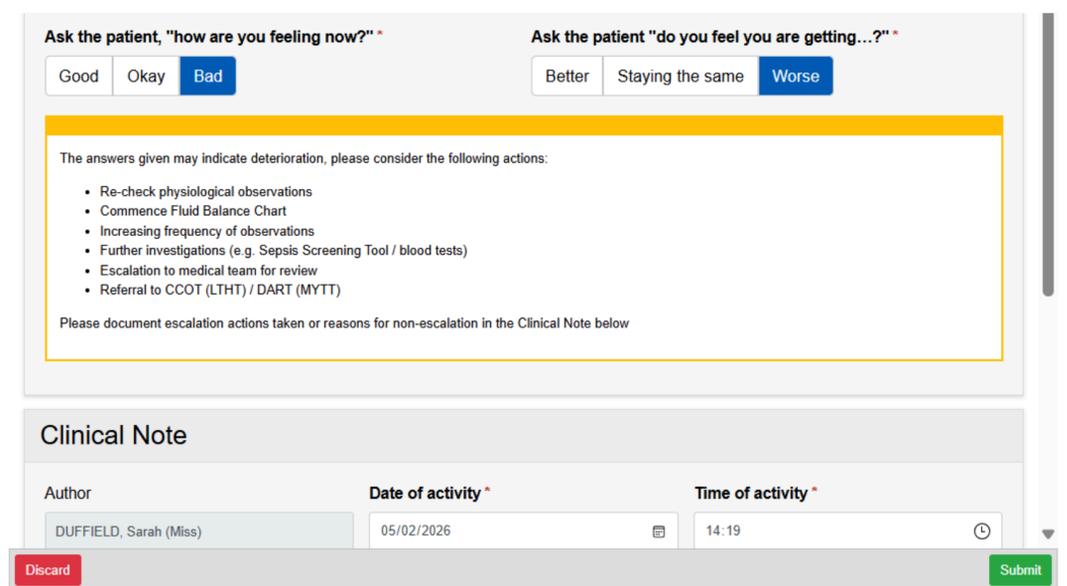
Clinical Note

Author: DUFFIELD, Sarah (Miss) Date of activity: 05/02/2026 Time of activity: 14:19

Discard Submit

3

Ask the patient **do you feel you are getting..?** They can choose from **Better, Staying the same** or **Worse**. **Clinical Note** is required to be completed, **regardless** of the answer they choose.



Ask the patient, "how are you feeling now?"

Good Okay **Bad**

Ask the patient "do you feel you are getting...?"

Better Staying the same **Worse**

The answers given may indicate deterioration, please consider the following actions:

- Re-check physiological observations
- Commence Fluid Balance Chart
- Increasing frequency of observations
- Further investigations (e.g. Sepsis Screening Tool / blood tests)
- Escalation to medical team for review
- Referral to CCOT (LTHT) / DART (MYTT)

Please document escalation actions taken or reasons for non-escalation in the Clinical Note below

Clinical Note

Author: DUFFIELD, Sarah (Miss) Date of activity: 05/02/2026 Time of activity: 14:19

Discard Submit



4

When you have finished completing the eForm, click on **Submit**.

The screenshot shows a web-based form titled "Patient Wellness" for a patient named "TEST, Alice (Miss)". The form includes a header with patient details: "Born 01-Jan-1999", "Sex Female", and "NHS No.". Below this is a section for "Referral to CCOT (LHT) / DART (MYTT)" with a note: "Please document escalation actions taken or reasons for non-escalation in the Clinical Note below". The main section is "Clinical Note", which contains several fields: "Author" (DUFFIELD, Sarah (Miss)), "Date of activity" (05/02/2026), "Time of activity" (14:19), "Profession" (Medical), "Specialty" (Anaesthetics), and "Type of note" (General). There is also a "Subject Line" field with the text "Patient wellness" and a "Notes" field with the text "Discharge". At the bottom of the form, there are two buttons: "Discard" and "Submit". The "Submit" button is highlighted with a red border.

## Important Notice:

**The escalation advice and Clinical Note is only applicable if the Patient Well Assessment eForm is Positive, i.e. the answer is Bad or Worse.**



# How to complete the Patient Wellness Assessment observation if the patient is unable to self-advocate?

1

If you answer the question **Is the patient able to self-advocate?** as **No**, you will notice an additional question asking **Are family/carer/advocate able to answer questions?**



ELSEVIER TEST, Dashboard-Five  
Born: 24-Apr-2022      Sex:      NHS No. 912 812 6815

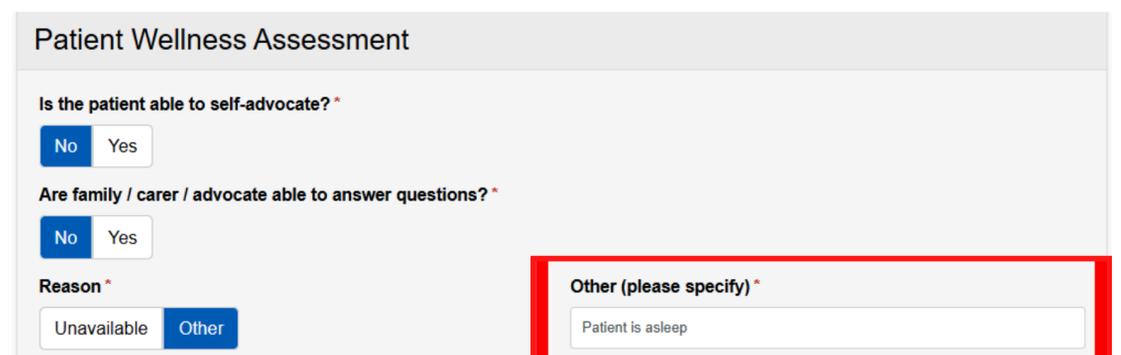
### Patient Wellness Assessment

Is the patient able to self-advocate? \*      Are family / carer / advocate able to answer questions? \*

No    Yes       No    Yes

2

If you answer this question as **No**, then you will need to provide a **reason**. If you select **Other**, then you will need to specify a reason in the free text box.



### Patient Wellness Assessment

Is the patient able to self-advocate? \*

No    Yes

Are family / carer / advocate able to answer questions? \*

No    Yes

Reason \*

   Other

Other (please specify) \*

3

If you select **No** to the question **Does the patient show any of the above signs of deterioration?** The form will end and you can click **Submit** to save the eForm.



Signs of deterioration:

- New confusion
- Agitation
- Changes in conscious level
- Increased breathlessness
- Reduced urine output
- Nausea, vomiting, loose stools
- Feels hot or cold to touch
- Pain

Does the patient show any of the above signs of deterioration? \*

No    Yes



4

If you select **Yes** to the question **Does the patient show any of the above signs of deterioration?**, then a **Clinical Note** will also be required to be completed.

Does the patient show any of the above signs of deterioration? \*

No Yes

The answers given may indicate deterioration, please consider the following actions:

- Re-check physiological observations
- Commence Fluid Balance Chart
- Increasing frequency of observations
- Further investigations (e.g. Sepsis Screening Tool / blood tests)
- Escalation to medical team for review
- Referral to CCOT (LHHT) / DART (MYTT)

Please document escalation actions taken or reasons for non-escalation in the Clinical Note below

Clinical Note

Author: DUFFIELD, Sarah (Miss) Date of activity: 05/02/2026 Time of activity: 14:31

Profession: Admin Specialty: Anaesthetics Type of note: General

Subject Line \*

Discard Submit

5

If you answer **Yes** to **Are family/carer/advocate able to answer questions**, then some additional questions will appear.

Patient Wellness Assessment

Is the patient able to self-advocate? \*

No Yes

Are family / carer / advocate able to answer questions? \*

No Yes

Ask the family / carer / advocate "how would you describe the child's current condition?" \*

Good Okay Bad

Ask the family / carer / advocate "how would you describe the child's condition compared to last time we asked?" \*

Better Staying the same Worse

Ask the family/carer/advocate **how would you describe the patient's current condition?** If they answer **Bad** then you will notice an **advice label** appearing regarding the next course of action that may be required. A **Clinical Note** is required to be completed.

6

Is the patient able to self-advocate? \*

No Yes

Are family / carer / advocate able to answer questions? \*

No Yes

Ask the family / carer / advocate "how would you describe the patient's current condition?" \*

Good Okay Bad

Ask the family / carer / advocate "how would you describe the patient's condition compared to last time we asked?" \*

Better Staying the same Worse

The answers given may indicate deterioration, please consider the following actions:

- Re-check physiological observations
- Commence Fluid Balance Chart
- Increasing frequency of observations
- Further investigations (e.g. Sepsis Screening Tool / blood tests)
- Escalation to medical team for review
- Referral to CCOT (LHHT) / DART (MYTT)

Please document escalation actions taken or reasons for non-escalation in the Clinical Note below

7

Ask the family/carer/advocate **how would you describe the patient's condition compared to last time we asked?** They can choose from **Better**, **Staying the same** or **Worse**. You will notice the **Clinical Note** is required to be completed, regardless of the answer they choose.

Is the patient able to self-advocate? \*

No Yes

Are family / carer / advocate able to answer questions? \*

No Yes

Ask the family / carer / advocate "how would you describe the patient's current condition?" \*

Good Okay Bad

Ask the family / carer / advocate "how would you describe the patient's condition compared to last time we asked?" \*

Better Staying the same Worse

The answers given may indicate deterioration, please consider the following actions:

- Re-check physiological observations
- Commence Fluid Balance Chart
- Increasing frequency of observations
- Further investigations (e.g. Sepsis Screening Tool / blood tests)
- Escalation to medical team for review
- Referral to CCOT (LHHT) / DART (MYTT)

Please document escalation actions taken or reasons for non-escalation in the Clinical Note below

Clinical Note



8

When you have finished completing the eForm, click on **Submit**.

The screenshot shows a web-based form titled "Patient Wellness" for a patient named "TEST, Alice (Miss)". The form includes a header with patient details: "Born 01-Jan-1999", "Sex Female", and "NHS No.". Below this is a section for "Clinical Note" with a yellow border and a prompt: "Please document escalation actions taken or reasons for non-escalation in the Clinical Note below". The form contains several input fields: "Author" (DUFFIELD, Sarah (Miss)), "Date of activity" (05/02/2026), "Time of activity" (14:31), "Profession" (Admin), "Specialty" (Anaesthetics), and "Type of note" (General). The "Subject Line" is "Patient wellness". The "Notes" section is empty and has a rich text editor toolbar. At the bottom right, a "Submit" button is highlighted with a red border.

## Important Notice:

**The escalation advice and Clinical Note is only applicable if the Patient Well Assessment eForm is Positive, i.e. the answer is Bad or Worse.**



# Viewing and Withdrawing a completed Patient Wellness Assessment

1

When you click on the eForm title in the **Summary** section, the summary table for the eForm will appear on the right hand side.

The screenshot shows a web interface for a Patient Wellness Assessment. At the top, there are buttons for 'Expand', 'Add New Document', and 'Refresh View'. Below this is a message: 'Some information may be omitted from this view. Please open the individual assessment for full details.' The main area is a table with a 'Show All' dropdown, 'Page 1 of 1', and a date/time filter '05-Feb-2026 14:55'. The table contains the following data:

Question	Answer
Is the patient able to self-advocate?	No
Are family / carer / advocate able to answer questions?	Yes
Reason	
How are you feeling now?	
Do you feel you are getting...?	
How would you describe the patient's current condition?	Bad
How would you describe the patient's condition compared to last time we asked?	Better
Level of concern	
Created By	DUFFIELD, Sarah (Miss), LTHT
Organisation	The Leeds Teaching Hospitals NHS Trust

2

Within the summary table, click on the **blue square** in the submission of interest to **Withdraw Document**.

This screenshot is identical to the previous one, but the dropdown menu for the 'No' answer to 'Is the patient able to self-advocate?' is open, showing three options: 'View Document', 'Withdraw Document', and 'View Contact'. A red box highlights this menu.

3

If you click on the **Withdraw** button, you can withdraw the completed eForm for the Patient. A warning message will pop up, once you have read through this, click **Next**. You will need to provide a reason for withdrawing the observation.

The dialog box has a title bar 'Withdraw' and a close button. The text inside reads: 'This entry is part of a **Patient-Wellness-Questionnaire** 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.' At the bottom right, there are 'Cancel' and 'Next' buttons, with 'Next' highlighted by a red box.

The dialog box has a title bar 'Withdraw' and a close button. The text inside reads: '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.' Below the text is a large empty text area outlined in red. At the bottom right, there are 'Cancel' and 'Withdraw' buttons, with 'Withdraw' highlighted by a red box.



4

If you click on **Expand**, you can view it in a larger format.  
To view the audit timeline, click **Audit Timeline**.

The screenshot shows a web interface for a 'Patient Wellness Assessment'. At the top, there are two buttons: 'Expand' (with a magnifying glass icon) and 'Add New Document', both highlighted with a red box. To the right is a 'Refresh View' button. Below the buttons, a message states: 'Some information may be omitted from this view. Please open the individual assessment for full details.' The main content area features a table with a 'Show All' dropdown menu, 'Page 1 of 1', and a date/time filter set to '05-Feb-2026 14:55'. The table contains the following data:

Question	Answer
Is the patient able to self-advocate?	No
Are family / carer / advocate able to answer questions?	Yes
Reason	
How are you feeling now?	
Do you feel you are getting...?	
How would you describe the patient's current condition?	Bad
How would you describe the patient's condition compared to last time we asked?	Better
Level of concern	
Created By	DUFFIELD, Sarah (Miss), LTHT
Organisation	The Leeds Teaching Hospitals NHS Trust

5

You can quickly add a new **Patient Wellness Assessment** via the Summary table for the eForm by clicking on the **Add New Document** button.

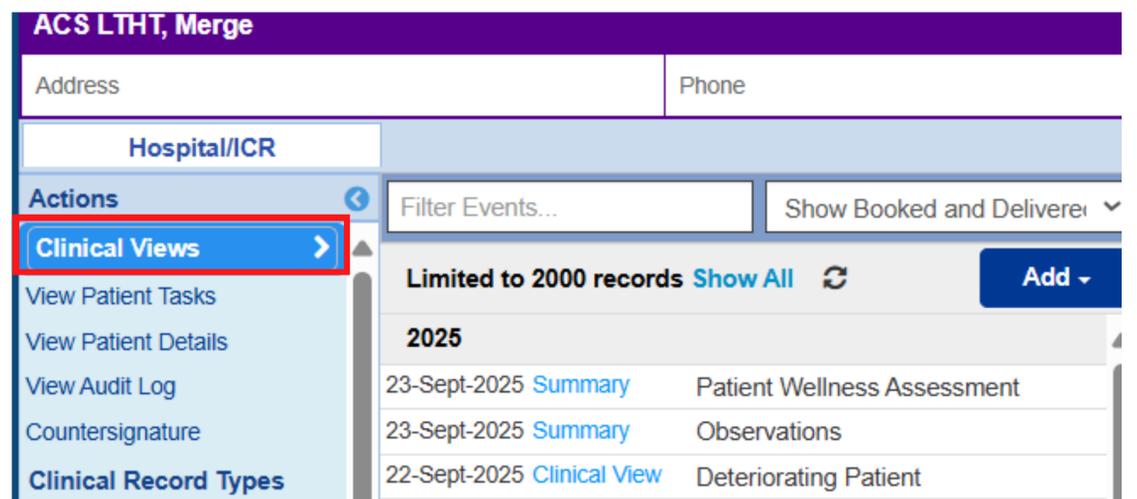
This screenshot is identical to the one above, showing the 'Patient Wellness Assessment' interface. In this version, the 'Add New Document' button is highlighted with a red box, while the 'Expand' button is not.



# Viewing a Patient Wellness Clinical Note

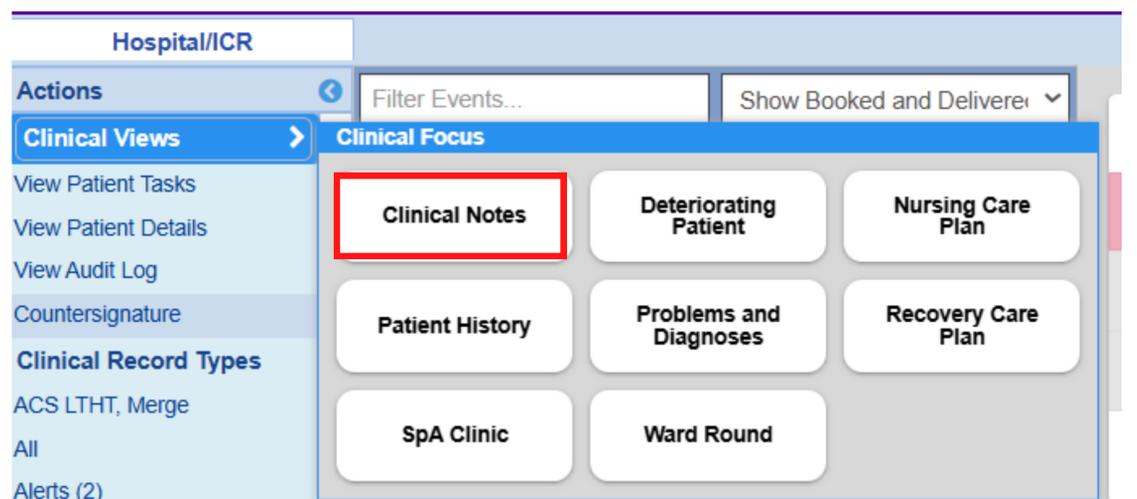
1

Navigate to your patient's **Single Patient View** and select **Clinical Views** in the left hand pane.



2

Select **Clinical Notes**.



3

The **Patient Wellness Assessment Clinical Note** will be listed in the **Clinical Note Dashboard**.

Clinical Notes

ACS LTHT, Merge

Born: 13-Dec-2000 (24y) Sex: Female NHS No. 003851

Address

Pas No. 003851

+ Add Note

Date Range	Status	Type	Profession	Specialty	Organisation	Images Attached?
24-Sept-2025 09:58	Select...	Select...	Select...	Select...	Select...	No
23-Sept-2025 11:51	Select...	Select...	Select...	Select...	Select...	No
23-Sept-2025 11:17	Select...	Select...	Select...	Select...	Select...	No

Notes

Images Attached?

LONG, Hayden (Mr)  
Case Manager  
Clinical Genetics  
The Leeds Teaching Hospitals NHS Trust  
Type: General  
Subject: Patient wellness  
Test Patient wellness

MawerR  
Admin  
All  
The Leeds Teaching Hospitals NHS Trust  
Type: General  
Subject: test  
test

MawerR  
Admin  
Accident and Emergency  
The Leeds Teaching Hospitals NHS Trust  
Type: General  
Subject: test  
test



# Contacts

## Implementation Team

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

 [leedsth-tr.ImplementationTeam@nhs.net](mailto: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>

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](mailto: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/>**