## Step-by step guide to access/generate an Anticipatory Care Planning – Key Information Summary (ACP-KIS) report on TRAK

A step-by step guide to accessing current ACP-KIS on TRAK

1. Log into TRAK Care



- 2. Enter patient identifiable information available to you on the **Patient Search** screen such as:
  - Surname
  - > Forename
  - Date of Birth
  - > CHI Number etc,

## and click Find.

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tient Search								
UHPI Number								
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CHI Number								
Other Numbers								
_								
Exact Match								
Similar Names 🖌								
Only Current Inpatients								
only Registered Patients ⋥								
Find								

> The TRAK screen will open up displaying the **Patient Episode List** for that individual:

-											04/51		
	UHPI		Surname	First	name	Dat	e of Bir	th	87 Yrs	Male		CHI: Num	ber
Patient En	quiry Di		45-										
RegistratonNo	Surname	Forename	Middle Name DO	DB Sex	Episode	,							
- F				mare									
	Patient	Episode List											
	Episode	* Date	* Specialty/Team	A Care Provider	A	A Service/Sub- Specialty	<ul> <li>Visit</li> <li>Status</li> </ul>	* Ward	* Discharge Date	* Discharge Time	Activity Type	▲ Wait List Type	UCPN
	•	29/06/202	2 OT - Accident & Emergency				Discharged			10:50	Outpatient		
		27/03/202	2 2 - IC, A&E				Discharged	2 - IC, A&E		13:05	Emergency		
	•	21/01/202	2 Respiratory Medicine		>		Discharged				Outpatient	Lothian - Outpatient WL	
	00000	02/11/202	1 Cardiology		,		Current				Outnatient	Lothian - Outpatient WL	

3. Click to highlight the most recent Patient Episode in the Patient Episode List. (DO NOT click on any of the hyperlinks on that episode as this will open the Episode/Referral Details window. If this happens just close that window and return to the patient episode list and repeat step 3.)

Clinical Menu	>	ATD Menu	> Appt H	lenu	> Pl	Eng Menu	> MR	T Menu	🔞 Res	earch	<ul> <li>Specialty Form</li> </ul>	1 (1) Re	oults	CT UR
	UHPI		Surna	me	First	name	Dat	e of Bir	th	87 Yrs	Male		CHI:	Number
Patient En	quiry Di	isplay												
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	Patient	Episode List												
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		29/06/292	OT - Accider	tā .							10:50	Outpatient		

4. Click on EPR to the right of the screen:

Clinical Menu		ATD Menu	> Appt Mer	na i	> RI	Eng Menu	> MR	Menu	😨 Res	earch >	Specialty Forms	(Q) Re	oults	CT DR
	UHPI	1	Surnam	e	First	name	Dat	e of Birt	th	87 Yrs	Male		CHI:	Number
Patient En	quiry Di	splay												
RegistratonNo	Surname	Forename	Middle Name	006	Sex	Episode	65							
					Nale	*								
	Patient	Episode List												
	Episode	. Date	speciality/Tear		Care vider	A	A Service/Sub- Specialty	. Visit Status	. Ward	* Discharge Date	Discharge	Activity Type	* Wait List Ty	VDe UCPN
	8	29/06/292	2 OT - Accident	8 V.							10:50	Outpatient.		

- > The CLINCIAL NOTES screen will open.
- 5. From the menu on the left of the screen, select KIS / Patient Preference / Concerns / Perception / Condition from the list

UHPI	Ь	Surname	First nam	ne D	ate of Bir	th i	87 Yrs	Male	CHI: N	lumbe	er -
Overview / Progress	Consultation List	Ward Round / Review	Correspondence	Clinical Notes	Significant Information	Treatment Escalation	Anaesthetic and Operat.		Clinical Notes (All)	Anaesth and Ope	
Discharge Letter / Meds	Clinical Audit / QI										
Observations / Measurements	v Consultation	List ONew								J	
Growth Chart	Help										_
Early Warning Score (Adults C		the patient's clerking nmary' Report from th	first tick the 'Select' che le Print menu above	ckbox against the	Generic Clerking' b	elow and then select					
Social Summary	Select Consult Cat	tegory		Status Create	ate Update Date	Last Update User	Edit				
KIS / Patient preferences / Co	✓ Clinical Note	e - Outcome									
Allergies / Alerts / Risks	Date Updated 🔺	Notes							Last Updat	e User	Edit
Clinical History	> Consultation	Recovery									
		Recovery Audi									

- The **KIS screen** will open:
- 6. Click on the Generate KIS Report hyperlink to generate a pdf of the KIS Report.



You must click on the **generate KIS report** hyperlink to access the current up to date KIS. This action will pull through the current record from the shared system.

## **Example KIS REPORT**

Patients C	HI No / DOB	/ Name/ Nam	ed GP/ GP Practice/ GP Practice Code is found here					
Key Information	n Summary							
Upload Decision:	Yes	09/04/2021						
Patient Consent:	Yes							
Patient Aware:	Yes							
Patient Not Aware	Reasons:							
Special Note:	Date: 09/04/2021	lives alone, recent diagnosis vascular dementia and osteoporosis with TS wedge compression fracture 2021, social care referral but no carers at present, daughter has POA and very involved, neighbour upstairs has key if needed. 9/4/21 increase in conflusion and visual halk-chaintons last few weeks, not taking meds, mobile with stick.						
	Expiry: 31/12/2099		terr meena, not salving meeta, meene min alek.					
Emergency or alle phone numbers:	emative contact							
Carer Details:								
Next of Kin Details	s:							
Medical History	1							
		Date Recorded	Comments					
Cognitive decline		01/04/2020	Prev coded as Imparement					

• If another TRAK user has previously generated a KIS report please be aware that these will only be as current as the date and time it was created. You can view previously generated KIS reports by clinking on the link.

Key Info	rmation Su	mmary	
Date dimated	Time Created 13:47	Path	User Created
07/10/2022	13:47	2	PDF

• The KIS report you download will automatically be saved on TRAK and can be re-opened if you log out of TRAK by following steps 1 through to 5 then clicking on the Path hyperlink for that PDF showing your TRAK user ID under User Created (see below).

	rmation Su		у
Date and	Time Created	Path	User Created
07/10/2022	13:47		.PDF

7. There is the option to print and save the KIS report generated by hovering over the page and clicking on the **print/save symbol** at the bottom of the PDF (or click the print/save icon).