

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](#).

The screenshot shows the 'Patient Search' interface. A red box highlights the search input fields: UHPI Number, Surname, Forename, DOB, Sex, CHI Number, and Other Numbers. Below these fields are several checkboxes: 'Exact Match' (checked), 'Similar Names' (checked), 'Only Current Departments' (unchecked), and 'Only Registered Patients' (checked). A 'Find' button is located at the bottom of the search area.

- The TRAK screen will open up displaying the [Patient Episode List](#) for that individual:

The screenshot shows the 'Patient Episode List' for a patient. The table is highlighted with a red box. The table has the following columns: Episode, Date, Specialty/Team, Care Provider, Service/Sub-Specialty, Visit Status, Ward, Discharge Date, Discharge Time, Activity Type, Wait List Type, and UCPN. The data rows are as follows:

Episode	Date	Specialty/Team	Care Provider	Service/Sub-Specialty	Visit Status	Ward	Discharge Date	Discharge Time	Activity Type	Wait List Type	UCPN
	29/06/2022	OT - Accident & Emergency			Discharged			10:50	Outpatient		
	27/03/2022	2 - IC, A&E			Discharged	2 - IC, A&E		13:05	Emergency		
	21/01/2022	Respiratory Medicine			Discharged				Outpatient	Lothian - Outpatient WL	
	02/11/2021	Cardiology			Current				Outpatient	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.)

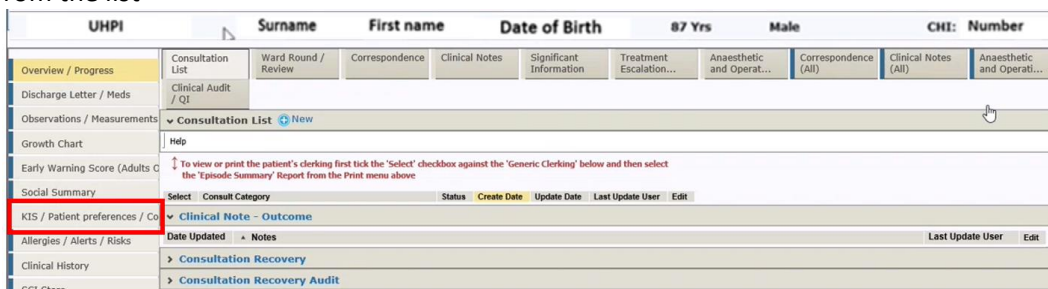


4. Click on EPR to the right of the screen:



➤ The CLINICAL NOTES screen will open.

5. From the menu on the left of the screen, select **KIS / Patient Preference / Concerns / Perception / Condition** from the list



➤ 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 CHI No / DOB/ Name/ Named GP/ GP Practice/ GP Practice Code is found here		
Key Information 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 [REDACTED] has POA and very involved. neighbour upstairs has key if needed. 9/4/21 increase in confusion and visual hallucinations last few weeks. not taking meds. mobile with stick.
	Expiry: 31/12/2099	
Emergency or alternative contact phone numbers:		
Carer Details:		
Next of Kin Details:		
Medical History		
	Date Recorded	Comments
Cognitive decline	01/04/2020	Prev coded as Impairment

- 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 clicking on the link.

Key Information Summary			
Generate KIS Report			
Date Created	Time Created	Path	User Created
07/10/2022	13:47	.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).

Key Information Summary			
Generate KIS Report			
Date Created	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).