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

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 **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
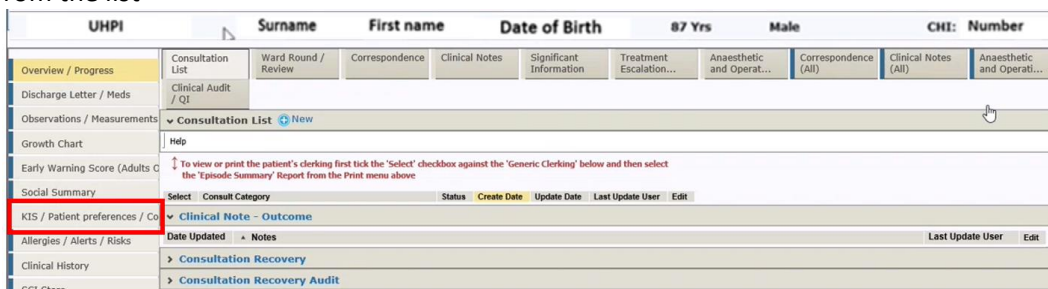
➢ The **KIS screen** will open:

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.

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 **Expiry:** 31/12/2099	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 confusion and visual hallucinations last few weeks. not taking meds. mobile with stick.
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 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 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).