

Guide to accessing/generating a Future Care Plan – Key Information Summary (KIS) report on TRAK

If you or a member of your team has access to TRAK this guide will take you through the steps to access the most-up-to-date Future Care Plan-KIS for the person you support.

1. Log into [TRAK Care](#)



2. Enter the patient identifiable information available to you on the [Patient Search](#) screen such as the individuals:

- Surname
- Forename
- Date of Birth
- CHI Number etc,

then click [Find](#).

A screenshot of the TRAK system's Patient Search interface. The search form is highlighted with a red box. It includes fields for UHPI Number, Surname, Forename, DOB, Sex, CHI Number, and Other Numbers. There are also checkboxes for 'Exact Match', 'Similar Names', 'Only Current Inpatients', and 'Only Registered Patients'. A 'Find' button is at the bottom of the form.

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

A screenshot of the TRAK system's Patient Episode List. The list is highlighted with a red box. It shows a table with columns for Episode, Date, Specialty/Team, Care Provider, Service/Sub-Specialty, Visit Status, Ward, Discharge Date, Discharge Time, Activity Type, Wait List Type, and UCPN. The most recent episode is highlighted in blue.

| 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.)

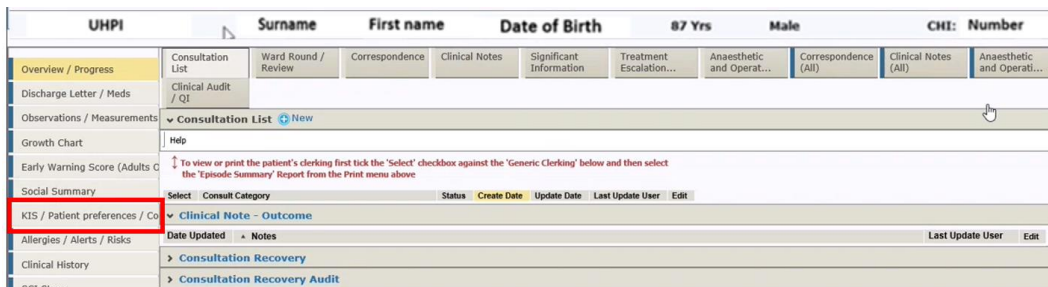


4. Click on EPR to the right of the screen:



➤ 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 most 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 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 [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. |
| Emergency or alternative contact phone numbers: | | |
| Carer Details: | | |
| Next of Kin Details: | | |
| Medical History | | |
| Cognitive decline | Date Recorded 01/04/2020 | Comments 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 on, as indicated below. You can view previously generated KIS reports by clicking on the associated [PDF](#) 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 to TRAK and can be opened up again if you log out of TRAK by following steps 1 through to 5 then clicking on the Path hyperlink for the 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).