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**.

   ➢ 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.)
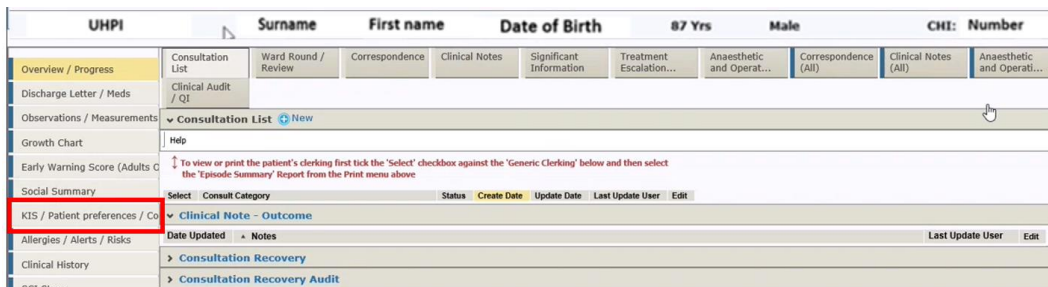
4. **Click on EPR** to the right of the screen:

> ➤ 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 most up-to-date KIS. This action will pull through the current record from the shared system.

Example KIS REPORT

- 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.

- 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).

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).