

TrakCare Upgrade Screen Differences

(excl Maternity)

TrakCare Version

T2022.4

Classification :	
for Approval	
for Discussion	
for Decision	
for Information	✓

Document governance	Name	Role / Job Title	Signature & date / email reference
Author	Kathy Woolley	Configuration Specialist	
Contributors	Venkat Krishna	Testing	
Peer review	TrakCare Optimisation Team		
Authority review/ business sign-off	Zoe Heath-Williams	Optimisation Team Lead	
Authority review/ business sign-off			
Authority review/ business sign-off			
Authority review/ business sign-off			

Version no.	Date	Author / updated by	Updates	Status
0.1		Kathy Woolley	Initial document	In progress
0.2	1/11/2022	Kathy Woolley	Removed Maternity (to be separate document)	In progress
0.3	15/11/2022	Kathy Woolley	Remove all description/label changes	Complete
1.0	28/11/22	Kathy Woolley		Final Version
1.1	02/12/22	Kathy Woolley	Amendment made	Final Version

Contents

To open the individual headings below, click the white area surrounding the contents table, this will grey each heading, then Ctrl+click to open the specific section or sub-section.

N.B. Please ignore any background colours in the screenshots as these were taken from several different environments.

Screen Differences after 2022 Upgrade (incl MR4)	4
General Changes	4
Zooming In/Out	4
Screen Refresh	5
Other Specific changes	6
EAU	6
Acute Admissions List	6
All clinical roles	7
Clinical Summaries – Co-Morbidity Details	7
Outpatients	8
Clinic List	8
Inpatients	11
Waiting List TCI History	11
Bed Management	11
Bed Search	11
Theatres	12
Menu Options	12
Adjust Theatre Session Care Provider	12
OT Workbench - Swap Schedules	13
Resource Schedule	14
Operation/Procedure Record	15
Medical Records	16
Volume Details	16
AHP	16
Episode Outcome	16

Screen Differences after 2022 Upgrade (incl MR4)

General Changes

Many of the changes are description/label ones, e.g OT List is now Theatre List, these will not be listed below. There are also some general changes due to TrakCare now using Microsoft EDGE as the browser.

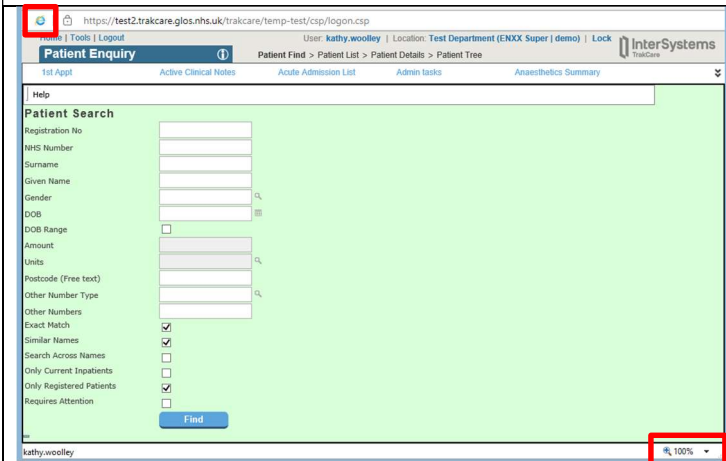
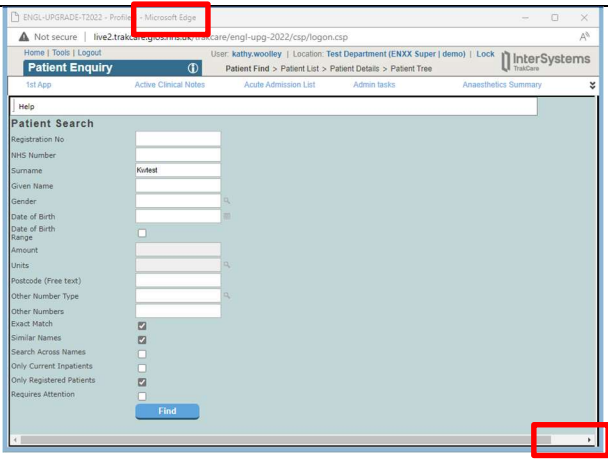
Editable fields

There is no X to remove the data in the field, it is now necessary to delete manually either by highlighting and clicking delete or backspacing

T2018	T2022
	

Zooming In/Out

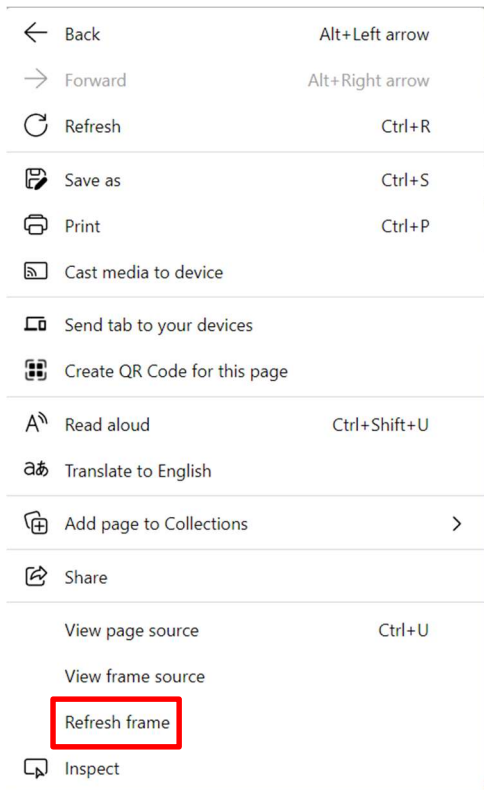
The option to zoom in and out is no longer present, to do this you need to use **Ctrl+** to zoom in and **Ctrl-** to zoom out

T2018	T2022
	

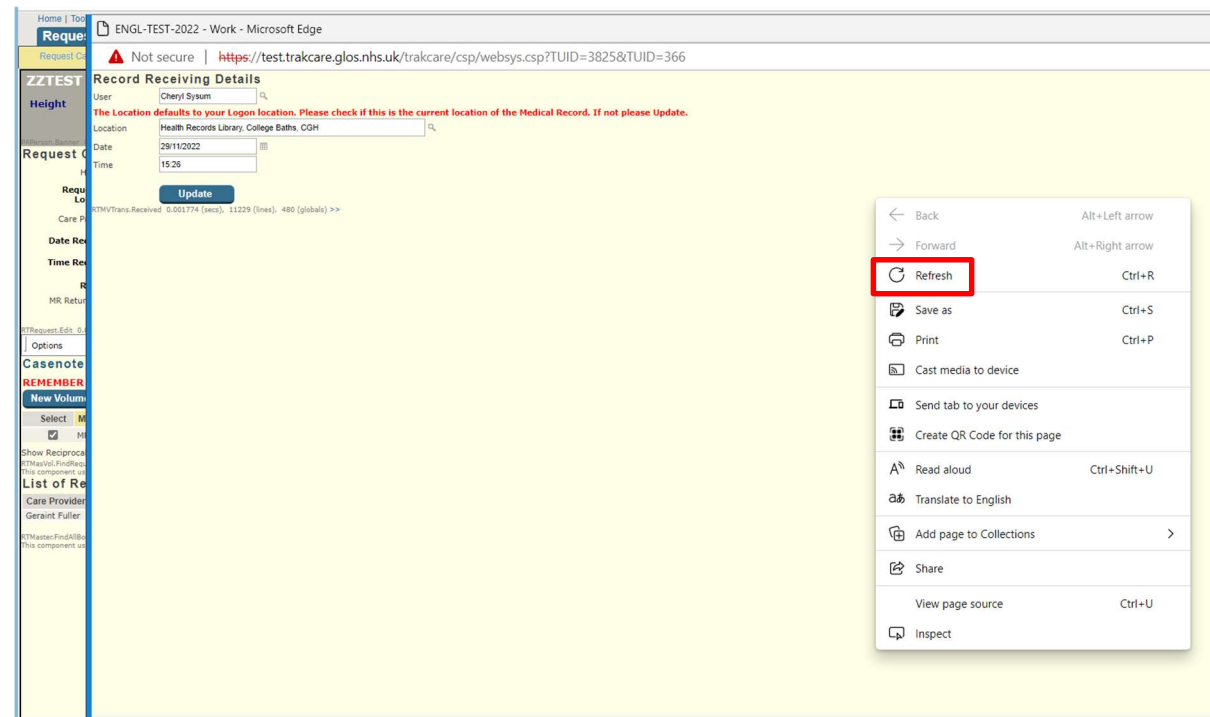
Screen Refresh

To refresh a main TrakCare screen, you now need to right click and select **Refresh Frame** (see example 1 below). If just Refresh is used, you will be logged out of TrakCare and will need to log back on again. However, if you are in a pop up screen please use the **Refresh** option as there will not be a Refresh Frame option to select (see example 2 below).

Example 1



Example 2



Other Specific changes

For Clinical Prioritisation (Wait List Review) changes please see the separate document.

EAU
Acute Admissions List

Look of the icons changed (a few examples below):

-  =  Not Triaged
-  =  Nursing Assessment Not Complete
-  =  Consultant Assessment Completed

T2018

ENGL-TEST-2018 - Internet Explorer

Home | Tools | Logout

User: cheryl.sayson | Location: Ambulatory Emergency Care (AEC), CGH (BNXX Nurses EAU) (GRH Nurse Mid Grade) | Lock

Acute Admission List

Active Clinical Notes | IP Registration | IP Pre-Reg | Acute Admission List | Wards | Floorplan | EPR | Discharge Medication | Discharge Planning

Acute Admission List

Date From: 20/01/2022 | Date To: 20/01/2022 | Preferences | Lock

Find

Additional Search Criteria

Select	Icons	Comments	Reg No.	Surname	Forename	Gender	DOB	Booked Ward	Booked Bed	Current Ward	Admission Bed	Visit Status	Episode Date	Episode Time	Episode Type	Reason for Attendance	Temporary Location	Responsible Consultant	Discharge Date
☐	  		9003920	Scm Nurse	Jan	Female	01/02/1990	2A Tower Block, GRH		2A Tower Block, GRH		Current (280 11:05:43)	20/01/2022	09:46	Inpatient	headache		Helen Alexander	
☐	  		9003969	Scm Nurse	Scm Nurse 1	Male	01/06/1996	Arising Ward, CGH		Arising Ward, CGH		Current	20/01/2022	10:07	Inpatient			Tonia Shrobbys	
☐	  		9003969	Scm Nurse	Scm Nurse 2	Female	01/06/1996	2B Tower Block, GRH		2B Tower Block, GRH		Current	20/01/2022	10:10	Inpatient			Hugh Wheatley	
☐	  		9003961	Scm Nurse	Scm Nurse3	Female	05/06/2004	Blbury Ward, CGH		Blbury Ward, CGH		Current	20/01/2022	10:13	Inpatient			Jonathan Orel	
☐	  		9003962	Scm Nurse	Scm Nurse4	Male	05/06/2004	2A Tower Block, GRH		2A Tower Block, GRH		Current	20/01/2022	10:21	Inpatient			James Moriarty	
☐	  		9003963	Scm Nurse	Scm Nurse 5	Male	03/07/1955	Cardiac Ward, CGH		Cardiac Ward, CGH		Current	20/01/2022	10:23	Inpatient			David Lindsay	
☐	  		9003964	Scm Nurse	Scm Nurse6	Female	03/07/1955	2A Tower Block, GRH		2A Tower Block, GRH		Current	20/01/2022	10:25	Inpatient			Mark Silva	
☐			9003965	Scm Nurse	Scm Nurse 7	Female	07/09/1999	Dixton Ward, CGH		Dixton Ward, CGH		Current	20/01/2022	10:27	Inpatient			Simon Cline	

T2022

Acute Admission List

Active Clinical Notes | Acute Admission List | Wards | Floorplan | EPR | Discharge Medication | Clinical Summaries | CS Review | Movements | Bed Request | Discharge Planning

Acute Admission List

Date From: 05/09/2022 | Date To: 06/09/2022 | Preferences | Lock

Find

Additional Search Criteria

Select	Icons	Comments	Registration Number	Surname	Forename	Gender	Date of Birth	Booked Ward	Booked Bed	Current Ward	Admission Bed	Visit Status	Admission Date	Admission Time	Episode Type	Reason for Attendance	Temporary Location	Responsible Consultant	Discharge Date
☐	  		0007478887	DAVIES	Hydrobacterium 6838	Male	29/07/1939	Mayhill Unit, GRH		Mayhill Unit, GRH		Pre-Admission	05/09/2022	07:30	Inpatient			Hugh Wheatley	
☐	  		000440998	HADDERS	Spec 7286	Male	15/06/1975	Dixton Ward, CGH		Dixton Ward, CGH		Pre-Admission	05/09/2022	07:30	Inpatient			Robert Gleeson	
☐	  		0001600341	AUSTEN	LAUREN	Female	15/12/1997	2A Annexe Tower Block GRH		2A Annexe Tower Block GRH		Pre-Admission	05/09/2022	07:30	Inpatient			William Mason	
☐	  		000877713	PIERCE	Kate	Female	02/06/1963	2B Tower Block, GRH		2B Tower Block, GRH		Pre-Admission	05/09/2022	07:30	Inpatient			Hugh Wheatley	
☐	  		0001680196	BUCK	STELLA	Female	04/06/1966	2B Tower Block, GRH		2B Tower Block, GRH		Pre-Admission	05/09/2022	07:30	Inpatient			Hugh Wheatley	
☐	  		0084241772	Edwards	Watchaphon	Male	11/06/1999	Mayhill Unit, GRH		Mayhill Unit, GRH		Pre-Admission	05/09/2022	07:30	Inpatient			Hugh Wheatley	

All clinical roles

Clinical Summaries – Co-Morbidity Details

New Warning at top of co-Morbidity Details screen as some values have been copied across from the last time the questionnaire was completed. If any previously entered fields default in that are not required, untick the relevant boxes to remove.

T2018	T2022
Summary Details Comorbidity Profile Diagnosis Co-Morbidity Details Clinical Notes Clinical Details Allergies Alerts Dementia Assessment QEP: Comorbidity Profile Patient Comorbidities and Conditions Patient has Co-morbidities Circulatory System Mental and Behaviour Disorders Nervous system Endocrine Disorders Genitourinary system Digestive Infectious and parasitic diseases Respiratory Systems	Summary Details Comorbidity Profile Diagnosis Co-Morbidity Details Clinical Notes Clinical Details Allergies Alerts Dementia Assessment QEP: Comorbidity Profile Patient Comorbidities and Conditions Patient has Co-morbidities Circulatory System Mental and Behaviour Disorders Nervous system Endocrine Disorders Genitourinary system Digestive Infectious and parasitic diseases Respiratory Systems

Outpatients

Clinic List

When accessing the **Not Available** edit or ellipsis on the Outpatient Worklist a warning message now appears with a second screen '**List of Conflicts**'. Action is required by the user to either **Progress with Action** or **Return to Master**. Progress with Action continues the process. Return to Master does nothing and you have to click the cross to exit the window returning you back to the previous unedited screen at present.

T2018

Not Available

Resource: Mr Gennadi Kalap

Date From: 12/08/2021
Time From: 09:00
Date To: 12/08/2021
Time To: 10:00

Reason: Meeting

Remarks:

Update Date
Update Time

Last Update User

Update
Delete

Message from webpage

The following conflicting appointments, events and/or not available times exist

Appointment(s)

Hip (Trauma and Orthopaedics) - Routine New Trauma and Orthopaedics 12/08/2021 09:20 - 09:40

OK

T2022

Not Available

Resource: Mr Sanjay Kumar

Date From: 09/01/2023
Time From: 15:00
Date To: 09/01/2023
Time To: 17:00

Reason: Meeting

Remarks:

Last Update Date
Last Update Time

Last Update User

Update
Delete

test.trakcare.glos.nhs.uk says

Do you want to review possible appointments, events and unavailable conflicts?

OK Cancel

The warning message will prevent you from making this period of Not Available until the displayed appointment is rescheduled.

Once the duration of the Not Available time has no appts booked, the slot becomes unavailable, displaying the reason, for the duration set in the Not Available screen

Select	Time	Reg No	NHS Number	Surname	Given Name	DOB	Gender	Interpreter Language	Appointment Type	Status	Arrive	Outcome	Icon Profile	RTT Status	Priority	Not Avail	Appt Offers	MDT	Remarks	Tpt	No of D
☐	08:00																				
☐	08:15																				
☐	08:30																				
☐	08:45																				
☐	09:00																				
☐	10:00																				
☐	10:15																				

If you click OK, a new screen **List of Conflicts** appears

List of Conflicts						
Type	Details	StartDate	StartTime	EndDate	EndTime	UBRN
A	Trauma and Orthopaedics:Paediatric (Trauma and Orthopaedics) - Follow Up	09/01/2023	15:40	09/01/2023	15:50	
A	Trauma and Orthopaedics:Telephone Foot and Ankle (Trauma and Orthopaedics) - Follow Up	09/01/2023	15:50	09/01/2023	16:00	
Progress with Action Return To Master						
RBNotAvail.List 0.460119 (secs), 306422 (lines), 12509 (globals) >>						

Clicking ‘**Progress with Action**’ will open the Auto Bulk Transfer screen where the appts can be rebooked

Auto Bulk Transfer

Hospital

Speciality

Consultant

Start Date

End Date

Start Time

End Time

Next Available

Reason For Transfer

Transfer Date

Overbook By

Print Patient Letter

14/11/2022

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Update

RBAppointment.AutoBulkTrans.Edit 0.112974 (secs), 223930 (lines), 6469 (globals) >>

Auto Bulk Transfer

Hospital

Speciality

Consultant

Start Date

End Date

Start Time

End Time

Next Available

Reason For Transfer

Transfer Date

Overbook By

Print Patient Letter

Trauma and Orthopaedics

Mr Sanjay Kumar

☒

14/11/2022

Monday

Tuesday

Wednesday

Thursday

Friday

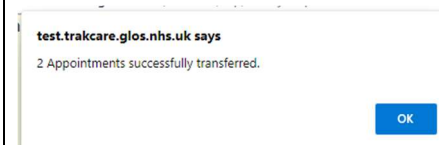
Saturday

Sunday

Update

RBAppointment.AutoBulkTrans.Edit 0.112974 (secs), 223930 (lines), 6469 (globals) >>

When clicking Update a warning message informs that the patients have been successfully transferred.



Clicking OK will cancel the patient appt and make the slot unavailable

My Appointment Sessions -

Date: 09/01/2023 Session Description: Form ID: 46976/85804/96523/103308/118234 Resource: Mr Sanjay Kumar
 Search for Registration Number: Session Message: Care Provider Seeing Patients: Day: Monday
 Session: 14:00 16:00 Multi Slot Override

Hide Overridden Closed Slots ☒

Select	Time	Registration Number	NHS Number	Surname	Given Name	Date of Birth	Gender	Interpreter Language	Appointment Type	Status	Arrive	Outcome	Icon Profile	RTT Status	Priority	Not Avail	Appt Offers	MDT Ch
☐	14:00																	
☐	14:20																	
☐	14:40																	
☒	15:00																	

MyAppointments.FindHeadDay(Sched: 8.023950 (week), 1.72870 (time), 1.9325 (global)) >>

If any patients have been placed on Hold they can be found via the Bulk Schedule menu option where they can be rebooked individually or by bulk.

Home | Tools | Logout User: kathy.westley | Location: Orthopaedic Outpatients, Trauma Unit, Ground Floor (ENX Admin Outpatients) (GHT Admin General) | Lock

Bulk Reschedule

Outpatient Waitlist | All App | Appointment List | OP Wait List | ERS App Letters | Task Waitlist | Request Cancellations | MPI | Outpatients | EPR | Path

View List Drop | Manual Referral | View CTS Records | Episode Outcomes | Last Patient List | MR Bulk Move | MR Bulk Request

Next Appt | Schedule | Bulk Reschedule | Schedule View

Print

Bulk Reschedule

Specialty: % ☐ Booked Reason For Transfer: % ☐
 Care Provider: % ☒ Hold Print Patient Letter: ☐
 Appt Type: %
 Start Date: 14/11/2022 To: % Bulk Transfer
 Start Time: % To: % Bulk Transfer All

MyAppointments.BulkTransfer(Lst: 8.147870 (week), 2.93348 (time), 7.9338 (global)) >>

Bulk Transfer

Reg No	Surname	Given Name	Resource	Date	Start Time	End Time	Appointment Type	Transfer	Referral Status	Priority	RTT Target Date	Transferred Count (Hospital Intakes)	Hospital	Appt Offers

MyAppointments.BulkTransfer(Lst: 8.147870 (week), 2.93348 (time), 7.9338 (global)) >>

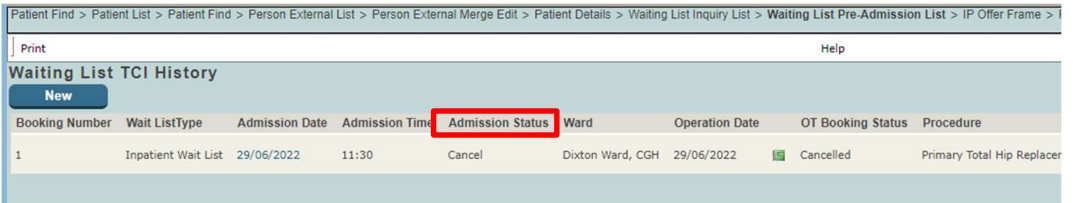
If, on the List of Conflicts you Click '**Return to Master**', the window will close and return you to the Not Available screen.

Inpatients

Waiting List TCI History

Waiting List TCI History

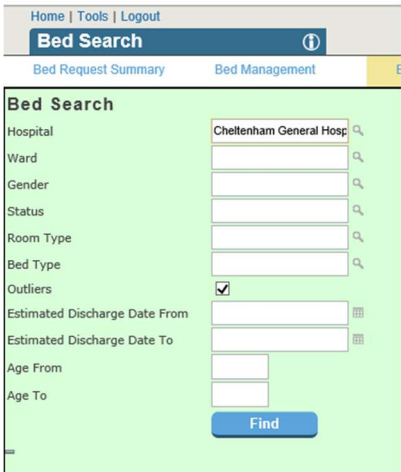
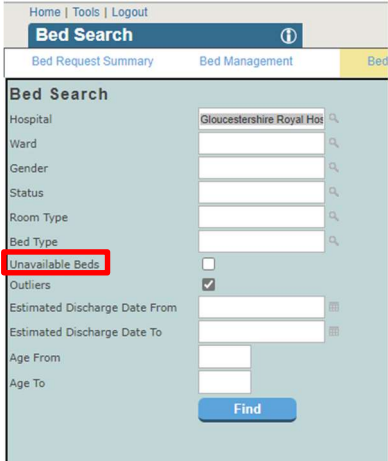
Additional column for Admission Status

T2018	T2022
	

Bed Management

Bed Search

Bed Search has an extra tick box field of Unavailable beds, when ticked it will only display beds that are temporarily unavailable.

T2018	T2022
	

Theatres

Menu Options

Additional menu option:

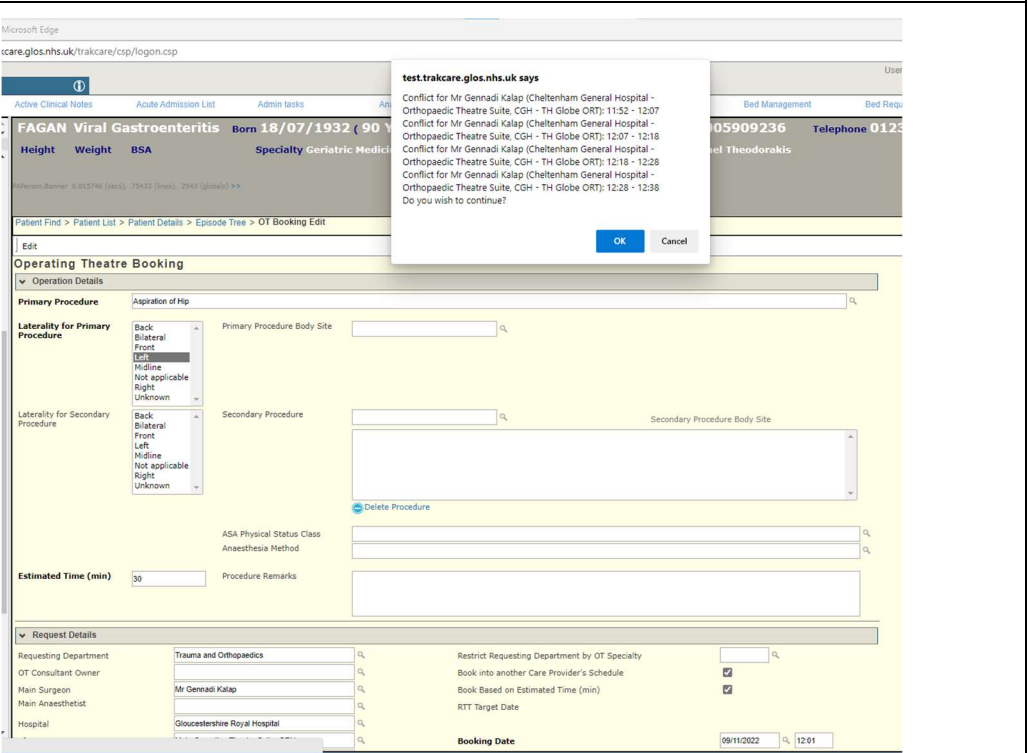
Wards

T2018	T2022
	

Adjust Theatre Session Care Provider

Operating Theatre Booking - New warning message

There is now a warning when booking a patient into a theatre schedule if there is a conflict for clinician.

T2018	T2022
	

OT Workbench - Swap Schedules

Menu option OT Management and sub menu Swap Schedules

When you select sessions, click the hyperlink for Swap Schedules and 'ok' message. The page clears in T2018 but refreshes with updated information in T2022.

T2018

OT Workbench

Location: Orthopaedic Theatre Suite, CGH

Resource: TH Globe ORT, TH Apollo ORT

Date: 03/02/2022

Status: Arrived, Booked, Cancelled, Closed, Confirmed

Swap Schedules

Resource	Swap	Session Date	Start Time	End Time	Total Time Remaining	Main OT Specialty	OT Consultant Owner	Surgeon	Anaesthetist	Icon Profile
TH Apollo ORT	☒	03/02/2022	09:00	17:00	480					
TH Globe ORT	☒	03/02/2022	08:30	18:30	600					

T2022

OT Workbench

Location: Main Operating Theatre Suite, GRH

Resource: TH 03 MOTS, TH 05 MOTS

Date: 22/09/2022

Status: Arrived, Booked, Cancelled, Closed, Confirmed

Swap Schedules

Resource	Swap	Session Date	Start Time	End Time	Total Time Remaining	Main Operating Theatre Specialty	Operating Theatre Consultant Owner	Surgeon	Anaesthetist	Icon Profile
TH 03 MOTS	☒	22/09/2022	09:00	17:00	480		Mr Richard Bulbulia	Mr Richard Bulbulia		
TH 05 MOTS	☒	22/09/2022	09:00	17:00	480		Charlotte Kallaway	Charlotte Kallaway		

Resource Schedule

Days in the Session Details section are now single selection from a look up list and not multiple selection

T2018

Session Details

Days

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Session Start Time

Session End Time

Slot Length

Load Level

Overbook

Update

Configuration

☒ Outpatients

☐ Inpatients

☐ Request MR

☐ Location

☐ Session Type

☐ Clinic Group

☐ Clinic

☐ Session Description

☐ Procedure Clinic

☐ Emergency Theatre

☐ Operation Booking Method

Services

MR Type Request

Multidisciplinary Team

Care Provider

Departments

Session Details

Days

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Session Start Time

Session End Time

Slot Length

Load Level

Overbook

Update

Configuration

☒ Outpatients

☐ Inpatients

☐ Request MR

☐ Location

☐ Session Type

☐ Clinic Group

☐ Clinic

☐ Session Description

☐ Procedure Clinic

☐ Emergency Theatre

☐ Operation Booking Method

Services

MR Type Request

Multidisciplinary Team

Care Provider

Departments

T2022

Session Details

Day

Session Start Time

Session End Time

Slot Length

Load Level

Overbook

Update

General Configuration

☒ Outpatients

☐ Inpatients

☐ Request MR

☐ Location

☐ Session Type

☐ Clinic Group

☐ Clinic

☐ Session Description

☐ Procedure Clinic

☐ Emergency Theatre

☐ Operation Booking Method

☐ OT Specialist

Services

MR Type Request

Multidisciplinary Team

Care Provider

Departments

Day

Description Code

Monday 1

Tuesday 2

Wednesday 3

Thursday 4

Friday 5

Saturday 6

Sunday 7

Do Not Transmit Resource for E Booking

Operation/Procedure Record

There is a new field where the actual Primary Procedure can be entered, the procedure entered onto the OT Booking will default in as the Planned Primary Procedure

T2018

Home | Tools | Logout User: kathy.woolley | Location: Surgical Treatment Rooms, CGH (ENXX Doctors Theatre)

Flowsheet

Active Clinical Notes

CLEWS JEAN Born 31/01/1928 (94 Yrs) Gender Female NHS No 008 344 4734 Reg No 0083444734 Telephone 01234 567890

Height Weight BSA Specialty Colorectal Surgery Location 9A Tower Block, GRH Care Provider Mr Tim Cook

WHO Checklist

Anaesthetic Record

Operation Record

Anaesthesia Start Time

Theatre In Time

Knife to Skin Time

Operation Finish Time

Anaesthesia Finish Time

Ready to Leave Recovery Time

Recovery Finish Time

Area Out Time

Options Help

Operation/Procedure Record

Operation No. Status

Procedure Details

Procedure Department Colorectal Surgery Procedure Start Time 30/08/2022

Surgeon Dr Amy Patel Procedure End Time 30/08/2022

Procedure Location Main Operating Theatre Suite, GRH Procedure Duration 1h:00m

Resource TH 06 MOTS

Primary Procedure

Laterality for Primary Procedure Back Bilateral Front Left Midline Not applicable Right Unknown

Primary Procedure Body Site

Primary Procedure Comments

Laterality for Secondary Procedure Back Bilateral Front Left Midline Not applicable Right Unknown

Secondary Procedure

Secondary Body Site

Delete Procedure

Procedure Notes

T2022

Home | Tools | Logout User: kathy.woolley | Location: Main Operating Theatre Suite, GRH (ENXX Doctors Theatre)

Theatre Flowsheet

Active Clinical Notes

PYMENT Jane Born 22/10/1974 (48 Yrs) Gender Female NHS No 000 623 6219 Reg No 0006236219 Telephone 01234 567890

Height Weight BSA Specialty Oral Surgery Location Mayhill Unit, GRH Care Provider Mr Daryl Richard Philip Godden

WHO Checklist

Anaesthetic Record

Operation Record

Anaesthesia Start Time

Theatre In Time

Knife to Skin Time

Operation Finish Time

Anaesthesia Finish Time

Ready to Leave Recovery Time

Recovery Finish Time

Area Out Time

Options Help

Operation/Procedure Record

Operation Number 00000300380 Status Apply Update

Procedure Details

Procedure Department Oral Surgery Procedure Start Time 01/12/2022

Surgeon Dr Amy Patel Procedure End Time 01/12/2022

Procedure Location Main Operating Theatre Suite, GRH Procedure Duration 1h:00m

Resource TH 05 MOTS

Planned Primary Procedure Temporomandibular (TMJ) Arthrocentesis and Steroid Injection

Actual Primary Procedure Finger finger release

Laterality for Primary Procedure Back Bilateral Front Left Midline Not applicable Right Unknown

Primary Procedure Body Site Finger - Index

Primary Procedure Comments

Laterality for Secondary Procedure Back Bilateral Front Left Midline Not applicable Right Unknown

Secondary Procedure

Secondary Procedure Body Site

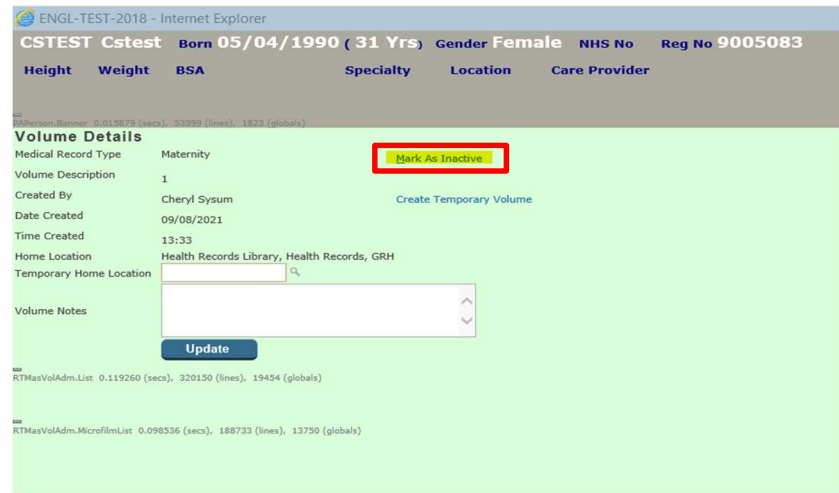
Delete Procedure

Procedure Notes

Medical Records

Volume Details

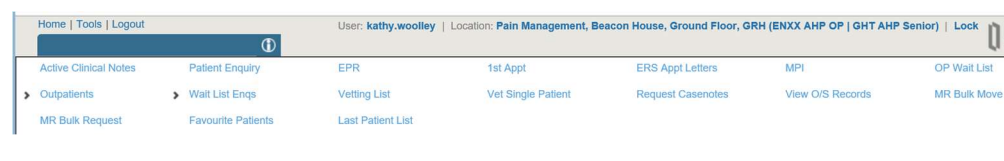
When managing volumes the hyperlink has changed from Mark as inactive to Manage Volumes. This link takes to the volume control screen which provides the same functions

T2018	T2022
 ENGL-TEST-2018 - Internet Explorer CSTEST Cstest Born 05/04/1990 (31 Yrs) Gender Female NHS No Reg No 9005083 Height Weight BSA Specialty Location Care Provider Volume Details Medical Record Type Maternity Mark As Inactive Volume Description 1 Created By Cheryl Syum Create Temporary Volume Date Created 09/08/2021 Time Created 13:33 Home Location Health Records Library, Health Records, GRH Temporary Home Location Volume Notes Update RTMasVolAdm.List: 0.119260 (secs), 320150 (lines), 19454 (globals) RTMasVolAdm.MicrofilmList: 0.098536 (secs), 188733 (lines), 13750 (globals)	 KWTEST Clinpriorumr Born 19/06/1958 (64 Yrs) Gender Fe Height Weight BSA Specialty Location Care Volume Details Medical Record Type MRN Manage Volumes Volume Description 1 Created By Kathy Woolley Create Temporary Volume Date Created 07/09/2022 Time Created 08:51 Home Location Health Records Library, Health Records, GRH Temporary Home Location Volume Notes Update

AHP

Episode Outcome

Additional menu option Episode Outcome has been added to the security group ENXX AHP OP to help facilitate the recording of follow up appts whereby they are added to a Return Outpatient Wait List

T2018	T2022
 Home Tools Logout User: kathy.woolley Location: Pain Management, Beacon House, Ground Floor, GRH (ENXX AHP OP GHT AHP Senior) Lock Active Clinical Notes Patient Enquiry EPR 1st Appt ERS Appt Letters MPI OP Wait List Outpatients Wait List Enqs Vetting List Vet Single Patient Request Casenotes View O/S Records MR Bulk Move MR Bulk Request Favourite Patients Last Patient List	 Home Tools Logout User: kathy.woolley Location: Physiotherapy Department, Outpatients Unit, Ground Floor, GRH (ENXX AHP OP GHT AHP Mid Grade) Lock Active Clinical Notes Schedule View Patient Enquiry EPR 1st App ERS Appt Letters Episode Outcome MPI OP Wait List Outpatients Wait List Enqs Vetting List Vet Single Patient Request Casenotes View O/S Records MR Bulk Move MR Bulk Request Favourite Patients Last Patient List