



# Managing your AnticiPal list for 4-ACP

This document is a guide for how to MANAGE your AnticiPal list and SHARE the results securely with the 4-ACP research team. You will need a copy of the Excel spreadsheet called “AnticiPal Practice Data template.” You can get a copy from Bruce Mason ([bruce.mason@ed.ac.uk](mailto:bruce.mason@ed.ac.uk)) or download one from the project website ([https://www.ed.ac.uk/sites/default/files/atoms/files/antecipal\\_practice\\_data\\_template.xlsx](https://www.ed.ac.uk/sites/default/files/atoms/files/antecipal_practice_data_template.xlsx)).

If you do not know how to run AnticiPal or you need help, please contact Bruce.

## First Run

The first time you run AnticiPal you will need to add all search results to the spreadsheet. Unless you have over 100 results, this should take less than 1 hour. Steps 1-5 can be done by a member of the admin/IT team. Step 6 needs to be done by the clinical team.

The steps are as follows:

### Admin/IT team steps

1. Run AnticiPal
2. Open a blank AnticiPal Practice Data template. Save the spreadsheet replacing the word “blank” in the title with today’s date.
3. Enter the name of your practice in the yellow box where it says <<<Practice Name here>>> and enter today’s date at the top of the far left column where it says <<<enter 1<sup>st</sup> run date here>>>. Save the spreadsheet.

<<<Practice name here>>>	Name	CHI number	Gender	Age Band	KIS y/n	<<<enter 1st run date here>>>
1						
2						

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Finlay's Medical centre	Name	CHI number	Gender	Age Band	KIS y/n	01 January 2001
1						

4. Starting with the first empty row, enter the CHI number and name of each patient present on your AnticiPal list. For each patient click in the cell for their gender and “Age Band” to choose the right value from the dropdown box. Finally, record whether the patient has a KIS by choosing Y/N from the dropdown box.

Finlay's Medical centre	Name	CHI number	Gender	Age Band	KIS y/n	01 Januar
1	John Doe	123456789	M	16-64	Y	
2						
3						
4						
5						

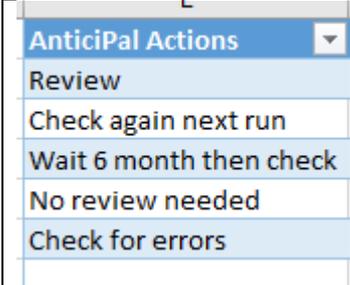
Use dropdown to enter Y/N for whether patient has a KIS



- Once you have done this for each patient on your list, save the spreadsheet and pass it to a clinical team member.

### Clinician step

- To screen the listed patients and select an action then you will use the dropdown box in the column under today's date. The dropdown box gives you the following options.

	<p><b>Review.</b> Choose this if you plan to review the patient or discuss them at a practice meeting.</p> <p><b>Check again next run.</b> Choose this if you don't want to review the patient soon but might want to next time.</p> <p><b>Wait 6 months then check.</b> Choose this if you don't want to consider this patient again in the next 6 months. <i>(Note that this will be after the research project has ended.)</i></p> <p><b>No review needed.</b> Choose this if you don't expect to need to review this patient unless a change occurs.</p> <p><b>Check for errors.</b> Choose this if the patient being listed seems inappropriate.</p>
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Once you have completed this process, you can print or screen-share the spreadsheet. We have set the spreadsheet to print all the columns on the same page.

### Second and future runs of AnticiPal

The first 6 steps can be done by a member of the admin or IT team. The clinician steps must be done by one of the clinical team.

#### Admin/IT management steps

- Run AnticiPal
- Open the last copy of the spreadsheet you saved. Save that spreadsheet replacing the date at the end of the spreadsheet's name with today's date.
- Enter today's date in the next "run date" column.
- Check your AnticiPal list for new entries: patients who are not already on your spreadsheet. For each new entry follow the process above by adding their name in the first empty row, CHI, gender, Age Band, and KIS status.
- Check your spreadsheet for patients who are no longer on your AnticiPal list. For each such patient, choose the dropdown option "Not on list."
- Once complete, save the spreadsheet and pass it to a clinical team member.



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Clinician step

- For each patient on your spreadsheet, choose an option from your dropdown box. Note that if you have previously entered “Wait 6 months” or “No review needed” you will choose “As per last run.”

AnticiPal Actions run2+ <span style="float: right;">▼</span> Review Check again next run Wait 6 months then check No review needed Check for errors Not on list As per last run	In addition to the usual options, two new ones are present. “Not on List.” Choose that option to mark that a patient is no longer on the AnticiPal list. “As per last run”. Use this to indicate that the same action as last time is to be taken. E.g.
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For example:

Finlay's Medical centre	Name	CHI number	Gender	Age Band	KIS y/n	01 January 2001	01 February 2001
1	John Doe	123456789	M	16-64	Y	Wait 6 months then check	As per last run

Sharing AnticiPal results securely

After your first and final run you will share the spreadsheet with the research team AFTER REMOVING ALL CONFIDENTIAL INFORMATION. To do this, open the spreadsheet and save it with a new name by adding “anon” to the end of the filename. Then delete columns B & C (name and CHI). Save it again then email it to the project researcher, Bruce Mason.

[Bruce.Mason@ed.ac.uk](mailto:Bruce.Mason@ed.ac.uk)

Note that we will check each file for confidential information and delete it SECURELY if any is found.

Example of spreadsheet with confidential information removed.

Finlay's Medical centre	Gender	Age Band	KIS y/n	01 January 2001	01 February 2001
1	M	16-64	Y	Wait 6 months then check	As per last run
2					
3					
4					