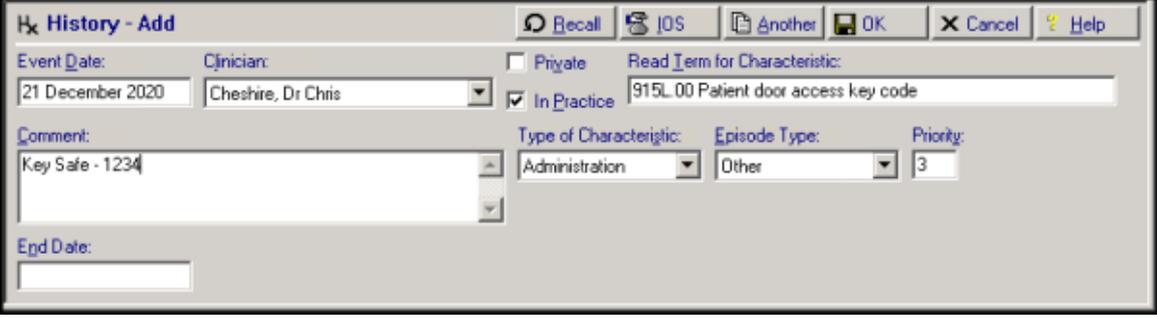


# Recording Key Safe Codes Quick Reference Guide

## Overview

If you need to record a key safe code for a patient, it should be added using clinical term **915L - Patient door access key code**:



This can be added from:

- **Consultation Manager** - Simply type **#915L** and press return, or select **Add Medical History**  and enter #915L and press return.
- **Registration** - From Vision 3 release DLM 800, you can enter a key code from a patient's Registration record. From Registration, find the patient required and select the Preference tab. Select **Safe Key**.

The **History - Add** screen displays, complete the details as required with the code in the **Comment** section and select **OK** to save.

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 **Important** - A Key Safe code should never be added to the patient's address screen, as this can have unintended security implications, for example if this is inadvertently printed out, or uploaded as part of the patient's demographics to other systems.

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## Identifying Patients with Key Safe Codes added in Address

If you have been recording Key Safe codes in the address details form, it is recommended that you identify the patients and re-add the Key Safe code using the aforementioned Read code.

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 **Note** - Please carefully consider which priority is used for the Read code, to ensure this is not printed/shared in error.

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There are three ways you can do this depending on how you have been entering Key Safe information:

- Download the patient demographic report from the Searches and Reports Help Centre.

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 See Downloading the Patient Demographic Report below for details.

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- Create and run an ad hoc search on Address Entries.

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 See Creating an Ad-hoc Search on Address Entries for details.

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- Search on house name entries with a freetext note containing “key”.

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 See Searching on House Name below for details.

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## Downloading the Patient Demographic Report

To download the Patient Demographic Report:

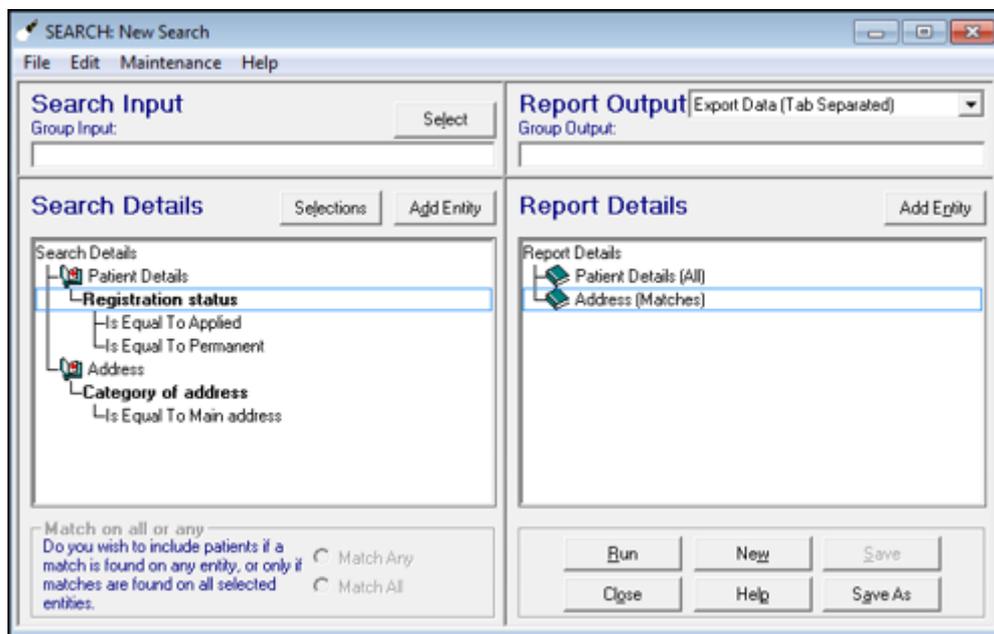
1. From the **Search and Report Help Centre** and download the [Patient Demographic Details](#) report.
2. Open the report and select **Get Demographic Data**.
3. You can now view patients who have Key Safe information. Remove it from the address entry and add the clinical term **915L - Patient door access key code**.



**Training Tip** - You can do a word search using **Ctrl+F** to find words/numbers or look for numbers in the address field(s). Please also consider contacting the patients and/or their carer and suggesting they change their key safe codes. You may also need to update your home visit printable report to include this clinical term.

## Creating an Ad-hoc Search on Address Entries

Using **Searches and Reports**, the search below allows you to export to Excel:



1. From the **Reporting** tab, select **Search & Reports**.
2. Select **New Adhoc Search** .
3. From **Search Details**, select **Patient Details**.
4. Select **Selections**, and choose **Registration status**.
5. Select **Add New** and then highlight **Applied** and **Permanent**.
6. Select **OK**.
7. Select **Add Entity**.

8. Double click **Additional Patient Data**.
9. Highlight **Address** and select **OK**.
10. Select **Address** from **Search Details**.
11. Select **Selections**.
12. Select **Category of Address**.
13. Select **Add New**, select equals **Main address**, and select **OK**.
14. Change **Report Output** to **Tab Separated** via the dropdown.
15. Select **Run**, a message displays asking you to select extract location, then select **OK**.
16. Open the file with **Excel**.

You can now view patients who have Key Safe information stored as part of their address. Remove this from the address entry and add it with the clinical term **915L - Patient door access key code**.

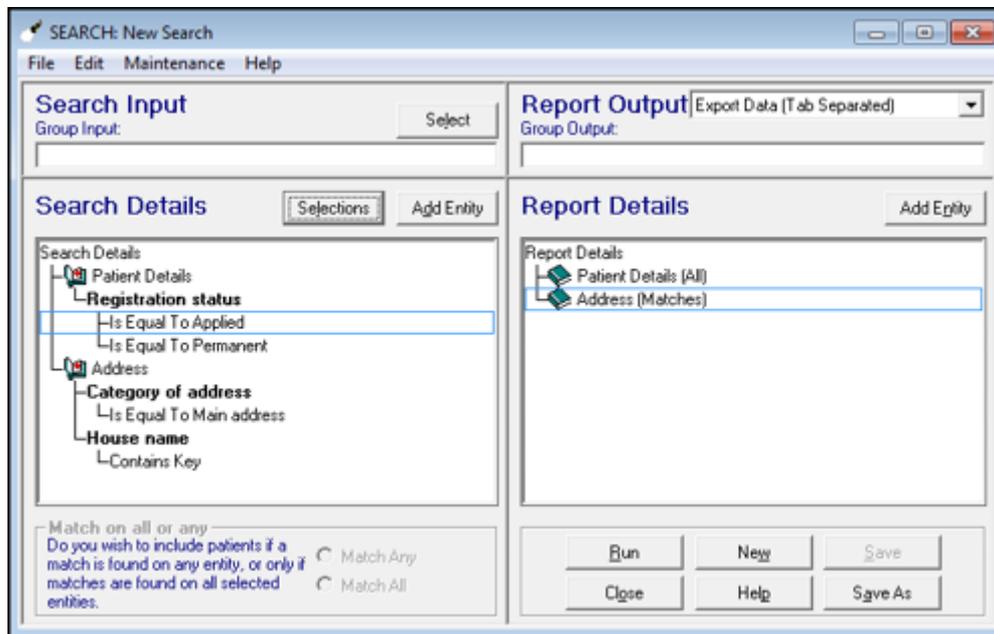


**Training Tip** - You can do a word search using **Ctrl+F** to find words/numbers or look for numbers in the address field(s). Please also consider contacting the patients and/or their carer and suggesting they change their key safe codes. You may also need to update your home visit printable report to include this clinical term.

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## Searching on House Name

Alternatively, if the code has been added to the House Name using the word "Key", the following search can identify the patients:



1. From the **Reporting** tab, select **Search & Reports**.
2. Select **New Adhoc Search** .
3. From **Search Details** , select **Patient Details**.
4. Select **Selections**, and choose **Registration status**.
5. Select **Add New** and then highlight **Applied** and **Permanent**.
6. Select **OK**.
7. Select **Add Entity**.
8. Double click **Additional Patient Data**.
9. Highlight **Address** and select **OK**.
10. Select **Address** from **Search Details**.
11. Select **Selections**.
12. Select **Category of Address**.
13. Select **Add New**, select equals **Main address**, and select **OK**.
14. Select **House name**.
15. Select **Add New**, choose **Contain**, and type **Key** , select **OK**.
16. Change **Report Output** to **Tab Separated** via the dropdown.
17. Select **Run**, a message displays asking you to select extract location, then select **OK**.
18. Open the file with **Excel**.

You can now view patients who have Key Safe information stored as their House Name. Remove this from the address entry and add it with the clinical term **915L - Patient door access key code**.



**Training Tip** - You can do a word search using Ctrl+F to find words/numbers or look for numbers in the address field(s). Please also consider contacting the patients and/or their carer and suggesting they change their key safe codes. You may also need to update your home visit printable report to include this Read code.

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See [Search and Reports - Creating a Search](#) for more details on creating ad-hoc searches

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