

Generating a Document

01/11/2024 2:32 pm GMT

Summary

Templates are generated through various areas of the Merlin

This page documents how documents can be generated using the Consent screen as an example.

Details

Generate a Document

The following types of documents can be generated in Merlin:

Consent = Reception, Diary, Daylists and/or Treatment screens.

Client = Reception screen.

Treatment = Treatment screen.

Prescription = Treatment Label Screen.

Debtors = Debtors Chase Up Letters

Patient, Compliance & Appointment Reminders = Reminders screen.

Code Entry = Code Templates

Report Wizard = Report Wizard

How to generate a Consent form

1. Search for the client and select the patient.
2. Select the **Consent** button
3. Enter Procedure & Possessions (if required). Note that these can be added into the Merlin Library area of (Administration > Documents > Consent Items > Procedures/Possessions). The template must have had the Merge Fields of 'Procedure' and 'Possessions' entered in order for this to display in the generated document.

Consent Forms

Procedure

Possessions

Search

File Name	
Anaesthetic Monitoring and Procedure Chart.docx	DOCX
Blood Glucose Chart.docx	DOCX
Cascade Consent.docx	DOCX
Consent for GA & Procedure.docx	DOCX
GA consent form 002.docx	DOCX
GA consent form 3.docx	DOCX
GA consent form.docx	DOCX
Non-GA Consent Form .docx	DOCX

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Preview Generate Cancel

4. Use the **Search box** to search for the document you wish to generate.
5. Select the **Surgeon** who is generating the document.
6. Select the document and select '**Generate**'.
7. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick '**Edit Consent form**').









Document Preview

VET_CONSENT_1266881_1721731003776_DOCUMENT.docx

Close

VET_CONSENT_1266881_1721731003776_... 

File Edit View Insert Format Tools Extensions Help

Search     100% Normal text Calibri 11    

82 Oak Tree Lane
Esher
GU13 5AX

23/07/2024

CONSENT FOR ANAESTHESIA AND OPERATION

ANIMAL DETAILS

Animal Name: Foxy	Weight:
Species: Canine	Date of Birth: 13/10/2017
Breed: Jack Russell Terrier	Age: 6 Years 9 Months 10 Days
Patient ID: 1266881	Gender: Male

OWNER DETAILS

Name: Mr/Mrs J Smith	Mobile No:
Address: 22 Heron Wood Road	Home No:
ALDRSHOT	Other No:

I hereby give permission for the administration of an anaesthetic to the Foxy and to the procedure(s) listed below, together with any other procedures which may prove necessary. Whilst every care and attention will be given to the patient's wellbeing, I understand that all anaesthetic techniques and surgical procedures involve some risk to my animal. I accept that in the event of further treatment being required, due to anaesthetic or surgical complications this will give rise to additional costs.

Estimated Cost: £ |

8. Make any required changes and print the document or close the screen (the document auto-saves).

9. This document will then save in the patient's Documents tab

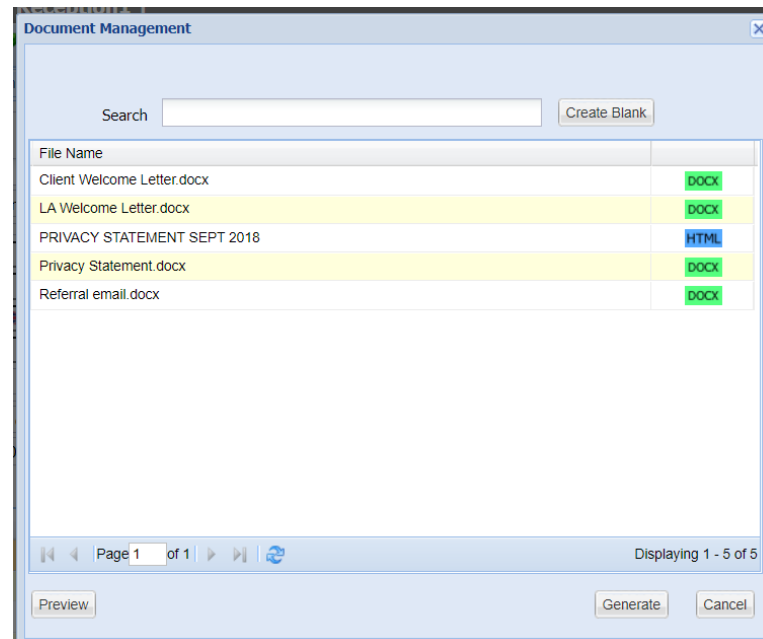
Note - Other areas Consent forms can be generated:

- Navigate to the Diary, right click an appointment and select 'Consent'.
- Navigate to the patient History tab and select 'Consent'.
- Navigate to the Add Treatment screen and select 'Consent'.
- Navigate to a Daylist such as Operations, Treated, Waiting, Hospital. From these screens, right click on the appointment and select 'Consent'.

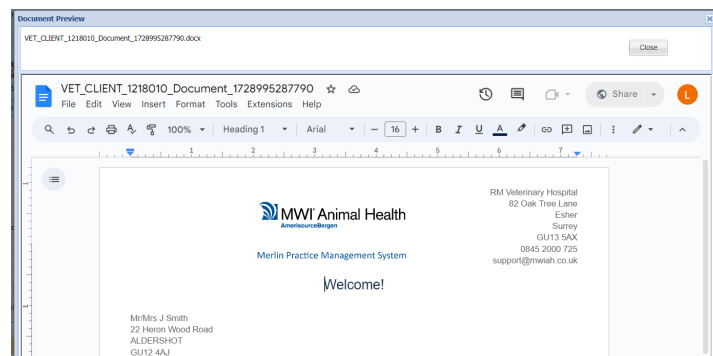
How to generate a Client form

1. Search and select the client.

2. Select the **New Document** button.
3. Use the **Search box** to search for the document you wish to generate.



4. Select the document and select '**Generate**'.
5. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick 'Edit Client's documents').
6. Make any required changes and print the document or close the screen (the document auto-saves).

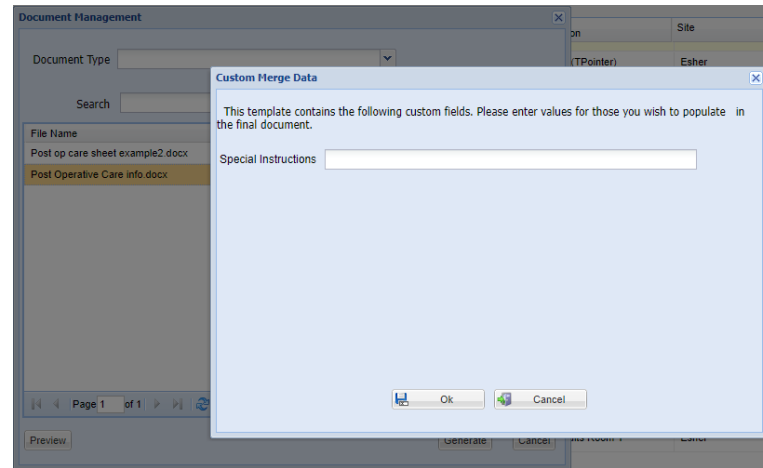


7. This document will then display in the client's Documents tab.

How to generate a Treatment form

1. Search for the client and double click the patient.
2. Select the **Doc Mgmt** tab and select **Create New Treatment**.
3. Use the **Search box** to search for the document you wish to generate.

4. Select the document and select '**Generate**'.
5. If any prompts have been added into the original Microsoft Word document, the Custom Merge Data window will display, prompting the user to add some free text in the box before generating the document. (For more information on how to add prompts, please see [Document Management - Creating Templates Step 3: Using Quick Parts](#)).



6. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick '[Edit Treatment documents](#)').
7. Make any required changes and print the document or close the screen (the document auto-saves).
8. This document will now display in the 'Add Treatment' screen. Press 'Save'
9. This document will then display in the patient's Documents tab.

How to generate a written prescription form

1. Search for the client and double click the patient.
2. Press 'Add Treatment'.
3. Search for the item and press 'Add'. Note - If Batch Traceability is turned on for this item in Code Entry, then Merlin will prompt to ask you which Batch Number you wish to select. *If Batch Traceability is not turned on, then follow steps 5 onwards.*
4. Select 'Use Selected Batch'
5. The Treatment Label window will now display. Press 'Written Prescription'.
6. A new Prescription window will now display. Proceed to fill in the boxes and press 'Save'

Prescription

Patient Name: Milo Species: Canine

Print Name, Strength on Formulation of Medicine: APOQUEL 5.4MG X 20 TABS DOG

Print Name and Qualifications: T Pointer

Route of Administration: By mouth

Amount Admin: Give 1 tablet

Duration: 20 days

Number of Repeats: 3

Frequency: Once a day

Validity Length (Month(s)): 1 ☐ Single Use ☒ Multi-Use

Save Cancel

7. Use the **Search box** to search for the document you wish to generate.

8. Select the document and select '**Generate**'.

Prescription Documents

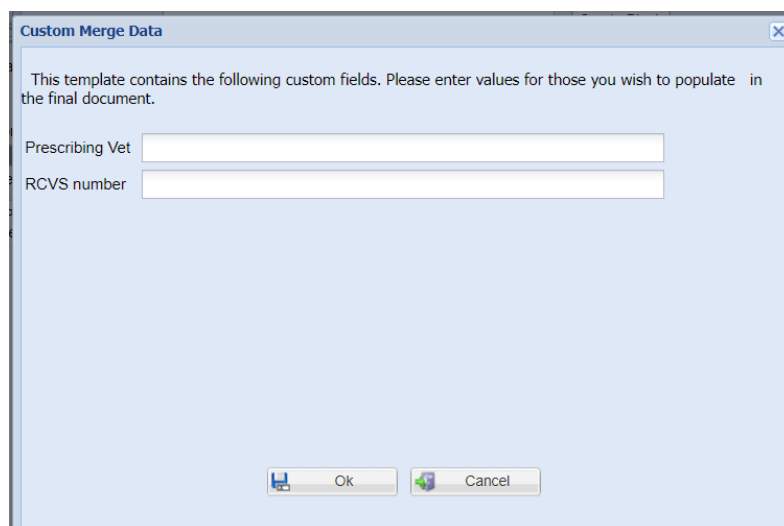
Search Create Blank

File Name	
LA Prescription Template.docx	DOCX
Presc 1.docx	DOCX
Prescription_googledoc	HTML
SA Prescription Template.docx	DOCX
Test Px Template.docx	DOCX
Written Prescription.docx	DOCX

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Preview Generate Cancel

9. If any prompts have been added into the original Microsoft Word document, the Custom Merge Data window will display, prompting the user to add some free text in the box before generating the document. (For more information on how to add prompts, please see [Document Management - Creating Templates Step 3: Using Quick Parts](#))



Custom Merge Data

This template contains the following custom fields. Please enter values for those you wish to populate in the final document.

Prescribing Vet

RCVS number

Ok Cancel

10. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick 'Edit Prescription documents').
11. Make any required changes and print the document or close the screen (the document auto-saves)
12. The written prescription document will show in the Add Treatment screen. Press 'Save'
13. The document can now be opened from the patient History tab and the patient Documents tab

How to generate a Debtors chase up letter

To generate a Debtors letter, please refer to [Debtors](#).

How to generate a Patient Reminder letter

To generate a Patient reminder letter, please refer to [Reminders > Patient Reminders](#).

How to generate a Compliance Reminder letter

To generate a Compliance Reminder letter, please refer to [Reminders > Compliance Reminders](#).

How to generate an Appointment Reminder letter

To generate an Appointment Reminder letter, please refer to [Reminders > Appointment Reminders](#).

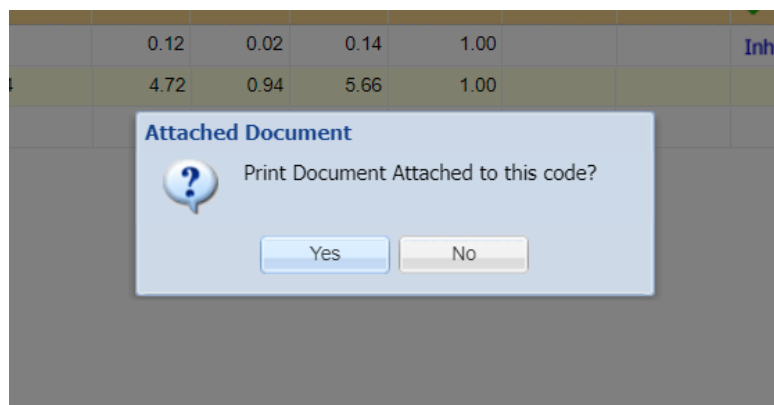
How to generate a Code Entry template

Please refer to [Code Entry > Code Maintenance > Add A Code > Treatment Options](#) for information about Code Entry templates.

To generate a Code Entry template, the code must have 'Enable Documents' turned on in the

Treatment Options screen, and a relevant document attached to it.

1. Search for the client and double click the patient.
2. Press 'Add Treatment'.
3. Search for the item and press 'Add'
4. The below pop up will appear. Press 'Yes' to print the template



5. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick 'Edit Code Entry documents').
6. Make any required changes and print the document.

How to generate a Report Wizard letter

Please refer to Reports > [Report Wizard](#) > Report Wizard results for information about how to generate a report.

1. When you have selected the required criteria in the Report Wizard screen, and selected 'List', there are options to email, text and print the letter.
 2. Use the **Search box** to search for the document you wish to generate.
 3. Select the document.
 4. The document can be previewed before sending out/printing by selecting the 'Preview' button.
 5. Once the document has been generated, it can be modified if the correct Setting has been enabled. (Administration > Settings > System > Tick '[Edit Report Wizard documents](#)').
 6. Make any required changes and print the document. View the [Report Wizard](#) module to find out more on other ways of sending documentation to clients.
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