

Client Data Consent

23/10/2024 12:28 pm BST

Summary

Influenced by the GDPR legislation, the tab in the Reception Screen labelled 'Data Consent' allows you to record consent and contact preferences for your Clients.

This is the second step when first registering a Client.

Details

The Data Consent Tab can be accessed via the Reception Screen. This screen allows you to record consent and contact preferences for your Clients.

Data Consent

Consent Audit

Consent History Purge Exception Entry

Client Terms

Generate your Privacy Statement below, these documents will be saved to Client Documents.

Privacy Statement ☐ Provided

Tick the box below to confirm the client understands the provided documents.

☐ Client Acceptance

Enter your initials below to submit the records

Initials Confirm

Communication Preferences

Select communication methods the client has agreed to receive.

The client has NOT BEEN ASKED for preferences before; some preferences are pre-populated.

	EMAIL	Post	TEXT
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contractual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vaccination Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parasite Treatment Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Check Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practice/Pet Care Advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviews and Surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers and Promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The selected consent method will automatically set an automatic opt-out of communications on 00/00/0000 unless details are confirmed before this date.

Enter your initials below to submit the records

Initials Confirm

Registering a New Client's Data Consent

Once the initial steps for Registering a Client have been completed and you have selected 'Save' the Data Consent tab will display for completion of consent details and communication preferences.

Data Consent Method

The first step is to specify the Client's Data Consent Method. The Data Consent Method selected determines how long you have the Client's data consent for.

Data Consent

Registration - In Practice (24 Months)

 Registration - Phone (12 Months)

 Registration - Online (12 Months)

 Registration - Email (12 Months)

 Registration - Other (12 Months)

 Emergency - In Practice (3 Months)

 Emergency - Phone (3 Months)

Example: If a client has been registered through the Practice's website, the user can record this through the system and a data consent validity of 12 months may be assigned to this code. Or if an emergency visit was required, the data consent method may be 'Emergency Visit' for which data consent may be valid for 2 Weeks.




Note: The Data Consent Method types and validity lengths are set by your practice, see page: [GDPR Administration](#)

To specify a Client's method of consent, select a '**Data Consent Method**' from the drop-down list.

Communication Preferences

Once a Client's Data Consent Method has been set, you can set the Client's Communication Preferences. By default all preferences are unticked except contractual (which cannot be changed). Hovering over contractual will give a description of what is deemed contractual communication.

To opt the client into communication for each communication type (listed on the left side), tick the correct checkbox for each communication channel (listed across the top).

	EMAIL 	Post 	TEXT 
Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contractual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices Statements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vaccination Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parasite Treatment Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointment Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health Check Reminders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Practice/Pet Care Advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviews and Surveys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers and Promotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Your system administrator can add and remove both types and channels in Merlin to allow your practice to optimise the data entry. For information, see page: [GDPR Administration](#)

These communication preferences will be set for the client for the validity length set for the Data Consent Method selected.

For this example, 'Registration – In Practice' has a consent validity length of 24 Months. Therefore if the Client has been registered on 23/05/2024, their consent will be valid for 24 months until their consent is automatically opted out of communications.

The selected consent method will automatically set an automatic opt-out of communications on **23/05/2025** unless details are confirmed before this date.

If a Client's Consent Validity expires, the status of the Client's communication will automatically opt-out of all communication preferences minus anything within Contractual communications. When this occurs you will still be able to send communications under the contractual communication type but no other type.

Ensure when opting in that all the correct options are selected as determined with your client.

Once Consent has been registered, the user needs to insert their initials and select 'Confirm' to record the Client's Consent. The user can then proceed to the 'Client Terms' section.

Client Terms

This section allows you to record the generation and acceptance of the 'Privacy Statement. The statement will generate automatically or it can be manually generated using the 'Privacy Statement' button.

This is where you may want to generate a document or contract which states clearly to the client during the registration process that you hold the data under legitimate interest and that legislations such as the Veterinary Medicines Regulations require you to hold data for 7 years.

Note: This document to be used as a Privacy statement is specified by the practice.

See: [GDPR Administration](#)

Client Terms

Generate your Privacy Statement below, these documents will be saved to Client Documents.

☒ Provided

Tick the box below to confirm the client understands the provided documents.

☐ Client Acceptance

Enter your initials below to submit the records

Initials

Privacy Statement Button = Used to manually generate the practice's Privacy Statement.

Provided = Checkbox to record a copy of the documentation has been provided to the client.

Client Acceptance = Used to record that the client has read and accepted your practice's terms and conditions documentation.

Initials = Record which user is confirming the client's acceptance.

Confirm button = Saves the client terms.

Once the above fields have been completed the user can move onto [register a Patient](#).

A summary of the above process is:

1. Enter **Data Consent Method**.
2. Enter **Communication Preferences**, **initial** and **confirm**.
3. **Generate Privacy Statement**, **initial** and **confirm**.

Updating an Existing Client's Data Consent

A Client's data consent preferences can be modified at any time.

When selecting a Client in Reception, the data consent tab is coloured to reflect their consent status.

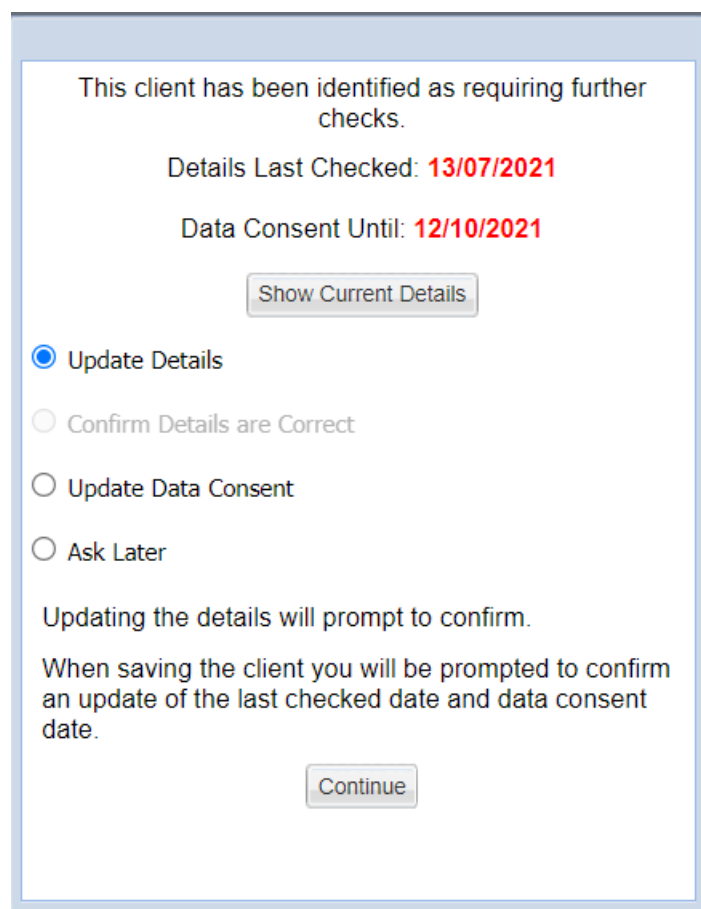
Red = No Consent or Expired Consent

Amber = Consent is Expiring soon

Green = Consent is valid

How do I know when a Client's Data Consent has expired?

When selecting a Client with expired data consent, users will be prompted by the Client Detail Checker functionality when they select their client record.



This client has been identified as requiring further checks.

Details Last Checked: **13/07/2021**

Data Consent Until: **12/10/2021**

☒ Update Details

☐ Confirm Details are Correct

☐ Update Data Consent

☐ Ask Later

Updating the details will prompt to confirm.

When saving the client you will be prompted to confirm an update of the last checked date and data consent date.

As above, their data consent tab within Client Details will be red in colour.



Additionally, there is a Data Consent report that can be run within [Standard Reports > Data Protection](#) that will list clients with no registered data consent.

Report [User - Jupiter : Site - Esher : Profile - Consult 1]

Standard Reports Report Wizard

Date From: 10/08/2024 Work Location: [All]

Date To: 09/09/2024 Client Site: Esher

Client Category: [All] Report Category: Data Protection

Report Format: PDF

Data Protection Report Data Consent - Not Given Run Report

Report Description

Lists Clients with no Data Consent registered.

Date: Registered Date.

Data Consent History

A Client's data consent history is audited and can be viewed from the Client's Data Consent Screen.

1. Navigate to a Client's **Data Consent tab**.
2. Select the '**Consent History**' button (right-hand side).
3. The Client's data consent history is displayed.

This screen records the type of consent, the method of consent, the communication preferences, the consent expiry date and the initials/username of the user who registered the consent.

Entry Date	Type	Method	Notes	Expiry Date	Initials	User
23/05/2024	Client Terms	Privacy Statement	Client Accepted		el	Jupiter
23/05/2024	Communication Consent	Registration - Phone (12 ...	[Type]Practice/Pet Care Advice[Categories]EMAIL=Ye... [Type]Parasite Treatment Reminders[Categories]EMAI... [Type]Health Check Reminders[Categories]EMAIL=Ye...	23/05/2025	el	Jupiter

Purge Exception

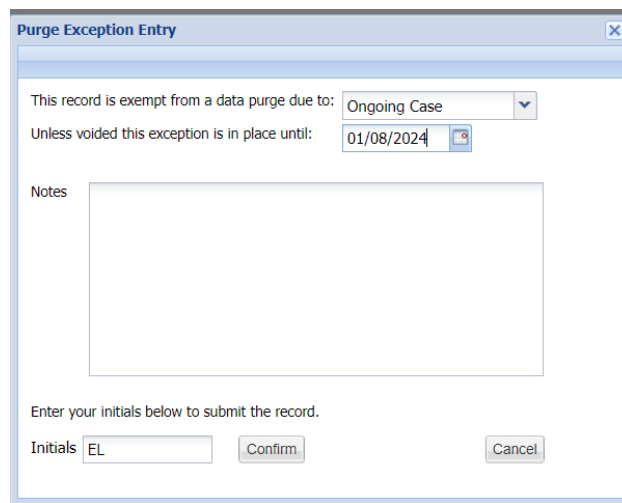
A data purge is a process in which a clients data will be removed because business determines that the data is no longer relevant under the GDPR (General Data Protection Regulations). Adding an exception will stop the clients record from being purged when there is a legitimate purpose for the retention of this data.

For more information on how data purges work see this page: [Client Purge Tool](#).

Add a Purge Exception

1. Navigate to the Client's '**Data Consent**' tab.
2. Select '**Purge Exception Entry**' button.

3. The following window will display which allows you to **record a Purge Exception Reason** , the date the exemption is valid until and record any notes along with the user's **initials**



Purge Exception Entry

This record is exempt from a data purge due to: Ongoing Case

Unless voided this exception is in place until: 01/08/2024

Notes

Enter your initials below to submit the record.

Initials EL Confirm Cancel

Note: The exemption reasons can be added to within the [Purge Exception Reason library area of Merlin](#).

4. The Client will then be exempt from a Data Purge until the date specified. This is recorded in the Consent History section for your records.
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