

Version 2.3.87 October 2024

20/08/2025 9:30 am BST



The Merlin - Version 87 release contains multiple improvements and notable changes to include the introduction of Plan Colours to the Health Care Plans with visual cues so users can quickly identify which plan a patient is on. In addition, we have made change to Short Text Codes so they are configurable for individual users and can be defined without impacting other users.

This update also contains bug fixes – further improving usability, plus added security features.

Highlights

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New Features

We're excited to announce the following new features:

- Plan Colours to the Health Care Plans (HCP)

What has changed?

We have introduced Plan Colours to the Health Care Plans with visual cues so users can quickly identify which plan a patient is on.

Why have we made these changes?

Currently, when a patient has an active HCP, they are highlighted in green in the patient list, and any treatment which receives an automatic HCP discount is highlighted green in the History. To enable this feature, go to Administration/Settings/Reception and click "Enable HCP Colour". Once enabled, when a user enters the Plan Admin screen from Administration/Health Care, they can define a Plan Short Description and assign a Plan Colour.

With a Plan Colour assigned, when the patient has an active HCP, they will be highlighted in the defined Plan Colour in the patient list, and the same Plan Colour will be used to highlight treatments that receive a Health Care Plan discount in the History screen. In addition, the grid in the collapsible left-hand bar will include the Short Description name of the plan and be highlighted in the corresponding Plan Colour.

- **Individual Short Text Codes**

Change to Short Text Codes so they are by (logged in) user rather than by Merlin instance.

What has changed?

It is now possible to enable or disable "Individual User Short Text Codes" for all users at the Merlin instance level, so that practices can decide which Merlin instances can use individual short text codes instead of instance short text codes.

Why have we made these changes?

Short Text Codes can be a very helpful feature from a productivity perspective. However, they are currently applicable at the Merlin instance level which means any user can create, edit, or delete short text codes, potentially impacting codes that are used by other users on the same Merlin instance.

Small Enhancements

We have also made the following improvements:

- If multiple items are selected on the Patient History screen and have previously been added to insurance, they can be deleted from insurance as one action.
 - Only items added to the same insurance claim can be deleted from insurance simultaneously.
 - Attempting to delete items from different claims will produce a warning message.
 - Selected items that have not previously been added to insurance will be skipped.
- Diary time in diary view will always default to current time in display. The setting can be adjusted in 'administration-settings-diary'. When the setting is applied the diary will do its best to track the current time across multiple diaries in one display (different calendars have different start and finish times so they are not easily aligned). The list below details what has been changed and how this has been applied:
 - Tracking of current time now only applies to the current date. Past and future diaries will display from the start of each surgeon's availability for that day
 - When viewing today, the current time will be highlighted, and appointment/available slots will be at the top of the screen.
 - If a surgeon is in a break between periods of availability, the break indicator (normally green) will be at the top of the screen.
 - If a surgeon has finished their availability for the day, an 'End of Appointments' indicator will be displayed at the top of the screen.

- In all cases it is possible to scroll to any part of the surgeon's availability.
- For consistency, the 'End of Appointments' indicator will be at the end of all surgeon days, except for diaries with no timed slots e.g. Operations.
- If linked scrolling is selected, behaviour will be as previously.
- The process for adding a new surgeon has been simplified by removing 3 practitioner types from the list labelled "Surgeon Type" on the "Add Surgeon" panel. The following practitioner types were removed as they are no longer appropriate: "Nurse", "Receptionist", "Manager".
- The "File" menu in the top bar of Merlin has been removed due to it containing only a duplicated "Log Out" option.
 - There is already a Log Out icon in the top right corner of Merlin in the user Interface.
- The Save Options section on the Patient Prescriptions Tab were commonly mistaken for a set of filters.
 - All of the required functions for these are available in other ways and so they have been removed to avoid confusion.
 - The Sites filter would only show values for the single site of the animal's owner, so was also redundant and has been removed.
- We have made improvements to the Actions List so that it is possible to navigate directly to an Appointment which has been added to the Actions List from the Diary view. The appointment can be opened by double-clicking on a record in the Actions List grid.
- When adding a composite item, a message to confirm that the item has been successfully saved is now displayed.
- The Maximum character limit for short text within clinical notes has been increased from three to four characters. This is to allow for a broader range of veterinary acronyms to be added to the library.
- Previously within the Repeat Prescriptions - patient history tab, when prescriptions listed had a 'valid to' date, the system would remove prescriptions after their 'valid to' date had expired, which meant that you did not have a full display of historical prescriptions as they would be automatically removed.
 - We made this change to allow a full repeat prescription history to be displayed, even when a 'valid to' date has expired.
- Addition of an action to apply a VAT rate to monetary credits.
 - A new action item "Accounts - edit credit VAT" has been added in the settings, which enables an administrator user to assign the action to other users, so they are able to apply a "VAT Rate" to a monetary credit.
 - When this action is enabled, you can now apply a 'VAT rate' to a 'monetary credit' from the drop down under Accounts > Credits > "Monetary" tab.
- Ignore clinical date in accounting period rules - This setting, in Administration/Settings/Treatment - allows you to add or make amendments to clinical work for any date range. Otherwise, work can only be backdated as far as the accounting period allows, and the commit date (invoice date) is always applicable to the accounting period and will block any changes.

To see the full details including bug fixes in this release, head to the [Full Merlin Release Notes](#) page.
