

GDPR Functionality

Merlin Release Notes 2.3.52





What Is It?

In 2.3.52 we have introduced further functionality in order to help assist Practices with GDPR compliance.

How Does it Work?

The following changes have been introduced.

Patient Labels

Personally identifiable information (PII) has been removed from Patient .The ContactID can be used to identify the Client within the system.

Client Detail Checker

The option to 'Update Data Consent' has been added to the Client Detail Checker.

This client has been identified as requiring further checks.							
Details Last Checked: 13/04/2018							
Data Consent Until: 13/04/2019							
Show Current Details							
Update Details							
Confirm Details are Correct							
Update Data Consent							
O 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.							
Continue							

Selecting this option will navigate the user to the Data Consent tab for the Client. The cursor focus is based on the following logic:

Client Detail Checker Scenario	Cursor Focus	Action on 'Continue'
A) Details Last Checked Date is earlier than Data Consent Until Date	Update Client Details	System Navigates to Client Details Tab for user to check Client Details.
 B) Data Consent Until Date is earlier than Details Last Checked Date 	Update Data Consent	System Navigates to Data Consent tab for user to check Data Consent Details
C) Data Consent Until = N/A	Update Data Consent	System Navigates to Data Consent tab for user to check Data Consent Details
D) Details Last Checked Date = Data Consent Until Date	Update Client Details	System Navigates to Client Details Tab for user to check Client Details.



Right to Access Report

Under the GDPR a client has the right to know what data you hold about them, to make this easier and less time intensive for your practice we have created a 'Right to Access' report which collates all the personal data for the selected Client.

Please note that this report does not include information you may hold outside of the PMS or held incorrectly within the PMS. This report includes all client notes, account notes, popup notes and communications logs.

Select a Client in Reception and select Print > 'Right to Access' Report.

🔛 Clear 🛛 📙	🚽 Save 📝 Modii	iy 🔬 Delete	🎦 New Document 🧃	🦻 Accounts 📑	Payments	2 Appointments	Send Text
🤹 Client Details 🛛 🔄 Additional Info 🛛 🛸 Notes 🛛 🎦 Documents 🛛 😹 Communication 🛛 🔂 Data Consent 🛛 🦘 Advanced S						Print Client Label	
Client O 7					Print Patient Label		
aTitle	Miss	Patient Chip	ID Stable Reg	g. Date 11/11/20	12 🖪	Add Details De	Print Right To Access Report

Once selected, a PDF document is generated with the report.

Report Wizard Export

As the Report Wizard allows you to extract and export personal data we have added additional functionality to assist with GDPR compliance.

When 'Listing' results, a new Export option 'No PII Columns' has been added. This is enabled by default and it means that the data exported will not extract any data that allows the Client to be personally identified.

Qu	Query Results									
Т	itle	Surname	First Name	Address_1	Address_2	Town	County	Post Code	Client Category	
M	Ir	A	121	Brook Cottage		Virginia water	Surrey	GUA	Small Animal	A
P	rofe	А	А	AA				А	LA	
P	rofe	A	Aa	Aaa		'Client Mod' Prog		А	LA	
P	rofe	A1234	Test	12		ASAS		SW18 9UI	LA	
М	Ir	ABBOTT		Newenham Hou		Hampton	Middlesex	GU14 3AE	Equine	
М	Ir	ABBOTT	JEW	Maypowders		South Littleton	Surrey	GUA	Small Animal	
P	rofe	Aa	Aa	А		. Bewdley		А	Emergency	
М	Ir	Aa Shop		Frogwell Farm		Egham	Surrey	GU14 4UL	Small Animal	
		Aaaa	Aaaa	Aaaa Aaaa	Aaaa	52 The Green	Berkshire	AAAA	Small Animal	
М	Ir	Aagersen	Lp	23 Willhayes Park		Virginia water	Surrey	GU6 6BU	Small Animal	
М	liss	Aarani Aru	А	12 Windyridge		Egham	Surrey	GU12 2XW	Small Animal	
M	Ir	Aarohii	Test	2		Abbots Langley		SW18 9UI	Emergency	
М	liss	Aaron		Colebrooke Ho		Hampton	Middlesex	GU12 2FJ	Small Animal	.
•										
k	Displaying 1 - 50 of 130									
	S Email or Print 🗸 🚦 Text or Print 🗸 Print Letters Print Client Labels 🗹 No PII Columns 📔 Export to CSV 🐗 Exit									
	Please select Display - Client to enable Email and Text buttons.									

The Client's Contact ID has been added to the report wizard extract so that the Client can be identified by the practice if need be.



Data Consent Tab Colour Coding

The Data Consent Tab is now colour coded to representing the state of the data consent for a Client.

 1. Red = No Consent or Expired Consent

 Image: Clear
 Save
 Modify
 Delete
 New Document
 Payments
 <t

2. **Yellow** = Consent Expiring

뜸 Clear 🛛 📙 Save 📝 Modify 🔬 Delete	New Document 🌮 Accounts Payments 🦉	🗿 Appointments 🔊 Print 👻 🔋 Send Text 📑 Send Email
🔓 Client Details 🔯 Additional Info 隊 Notes	Documents 🔝 Communication 📑 Data Consent	S Advanced Search

The timescale for this setting is configured in Administration > Settings > GDPR:

Prompt "Consent Detail Checker" 30 days before Consent Expires

3. Green = Consent is valid

뜸 Clear 📙 Save 📝 Modify 🔬 Del	lete 🛛 🎦 New Document 彦 Accounts	Payments 🎬 Appointments 💿 P
Client Details 🔯 Additional Info 隊 N	otes [Documents 🔝 Communication	n 📑 Data Consent 🗞 Advanced Search



Standard Reports

Two Standard Reports have been added to the system and can be located in Utilities > Reports > Standard Reports > Report Category = Data Protection.

Standard Reports Report Wizard							
Date From:	21/05/2018 Bork Location: Esher						
Date To:	20/06/2018 Client Site: Esher						
Client Category:	[All] Report Category: Data Protection						
Report Format:	PDF 🔹						
Data Protection	eport Data Consent - Expiry Dates Data Consent - Not Given						

Data Consent - Expire

This report will show the last consent's expiry date when within the reporting period. Client Site and Client Category take effect.

Data Consent - None

This report will show the clients where no data consent is recorded but where the registration date is between the date fields. Client Site and Client Category take effect.