Merlin Essentials

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This sheet contains basic Merlin guidance for frequently used areas that could be useful for new users.

Frequently Used Screens

Reception = User to register and modify Client/Patient details.

Diary = Used to book and manage appointments.

Full List = A full list of appointments for the current day.

Waiting List = A list of appointments yet to be treated today.

Treated List = A list of appointments that have received treatment.

Accounts = Take payments, print statements etc.

Reception

Search for a Client/Patient

1. Select 'Reception'.
2. Select 'Clear'.
3. Enter any combination of Client information into any of the fields (Surname, Patient name, Postcode etc.)
4. Select a Client from the bottom-half of the screen.
5. Select a Patient from the right-hand side of the screen.

NB if you search for a particular patient, Merlin will only show that patient, regardless of other patients owned by that particular client.

Adding a New Client

1. Select 'Reception'.
2. Select 'Clear'.
3. Enter Client Information (any mandatory fields are marked with a * asterisk).
4. Select 'Save'.
5. Select a 'Data Consent Type' from the drop-down list provided.
6. Tick the communication type/channels the client has provided consent to be communicated for/by.
7. Enter Initials and select 'Confirm' for the Communication Preferences section.
8. Enter Initials and Confirm the Client Terms section.
9. Select 'Save'.

Adding a New Patient

1. Select 'Reception'.

2. Search and Select a Client.
3. Select 'Add Patient'.
4. Enter the Patients Information (any mandatory fields are marked with a * asterisk).
5. Select 'Save'.

Appointments

Diary & Daylist Colours

Red = Arrived

Purple = In-Treatment

Blue = Treated

Green = Paid

Making an Appointment (From Reception)

1. Select Reception.
2. Search for your Client.
3. Select your Patient.
4. Select 'Make an appointment'.
5. Select (double-click) an available time slot.
6. Choose an appointment reason from the appointment dropdown list.
7. Add a note if necessary.
8. Enter initials and Save.

Making an Appointment (From Diary)

1. Select Diary
2. Select (double-click) an available time slot.
3. Search for your Client.
4. Select your Patient.
5. Choose an appointment reason from the appointment dropdown list.
6. Add a note if necessary.
7. Enter initials and Save.

Finding the price of an item/service

1. Select 'Finance' from the top toolbar.
2. Select 'Price List'
3. Select a Code Type from the left-hand menu.
4. Search for the product/service from the list provided.
5. The price of the item is displayed.

Treatment

Access a Patient's Treatment History

Option 1

1. Select Reception.
2. Search for your Client.
3. Select (double-click) your Patient.
4. The Treatment history is displayed. this shows any history that has been entered into Merlin.
5. If the 'Archive' tab is highlighted (blue) it contains history from a previous practice management system.

Option 2

1. Select Reception.
2. Search for your Client.
3. Select your Patient and click on the Treatment button
4. The Treatment history is displayed, this shows any history that has been entered into Merlin

Print/Email Treatment History

1. Enter a Patient's Treatment history screen (as above).
2. Select the 'Print History' drop-down button.
3. Select Print or Email history (depending on your requirement).
4. Specify if you want to show/hide clinical notes and financial information.
5. Select 'Include Archived Data' if you want to include history from a previous practice management system.
6. The document is generated ready to print or email.

Attach a document to a Patient's Treatment History

1. Enter a Patient's Treatment History Screen.
2. Select the 'Doc Mgmt' drop-down button.
3. Select 'Drag & Drop Files'.
4. Drag and drop the document/s you wish to attach into the outlined area.
5. Type a description for the document/s and select the Document Type
6. Select 'Save'.

Generate a Consent Form

1. Select Reception.
2. Search for your Client.
3. Select a Patient.
4. Select 'Consent Form'.
5. Select or search the document required.
6. Select 'Generate'.

Adding a Treatment

1. Select a Patient (double-click from Diary/Daylist or search and select from Reception).
2. From the Treatment History screen, select the 'Add Treatment' tab.
3. Search for a product/service in the 'Description' box.
4. Select 'Add' (or press enter).
5. When you are finished adding all the products/services, Select 'Save'.

Adding Clinical Notes

1. Select a Patient (double-click from Diary/Daylist or search and select from Reception).
2. From the Treatment History screen, Select the 'Clinical' button.
3. Enter your notes and select 'Save'.

Creating an Estimate

1. Select a Patient (double-click from Diary/Daylist or search and select from Reception).
2. From the Treatment History screen, select the 'Add Treatment' tab.
3. Search for a product/service in the 'Description' box.
4. Select 'Add' (or press enter).
5. When you are finished adding all the products/services, Select 'Save as Estimate'.
6. Name your estimate.
7. The estimate is added to the 'Saved Estimates' tab.

Accounts

Viewing a Client's Account

1. Select Reception.
2. Search for your Client.
3. Select the Accounts button.
4. The Clients account is displayed.

Taking a Payment

1. Select Reception.
2. Search for your Client.
3. Select Payments.
4. Select Payment type used by Client.
5. Enter the amount tendered.
6. Allocate the payment to correct invoice/s.
7. Save Payment.

Refund an item

1. Enter a Client's Account.
2. Select 'Refunds'.
3. Tick the box of the item you wish to refund.

4. Select 'Return Money'.

Credit an item

1. Enter a Client's Account.
2. Select 'Credits'.
3. Tick the box of the item you wish to credit.
4. Select 'Apply'.

Discounting to an item

1. Enter a Client's Account.
2. Select 'Discounts'.
3. Tick the box of the item you wish to discount.
4. Enter a % amount, description and select 'Apply'.

Cashing Up

1. Select 'Finance'.
2. Select 'Daily Cash'.
3. Select 'Start from last run'.
4. Check amounts and make any changes.
5. Print Summary (if required).
6. Select 'Register Last Date'.
7. Do you want to save this cash book entry? Select Yes'.