

Viewing and Editing Documents

29/10/2024 1:00 pm GMT

Summary

Previously generated documents can be viewed throughout various areas of the system.

This page documents how to view and edit documents, using the Consent screen as an example.

Details

The following types of documents can be viewed and modified in Merlin:

Consent = Treatment History and Treatment Document tab.

Client = Reception > Documents tab.

Treatment = Treatment History and Treatment Document tab.

Prescription = Treatment History and Treatment Document tab.

Debtors = Debtors Chase Up Letters.

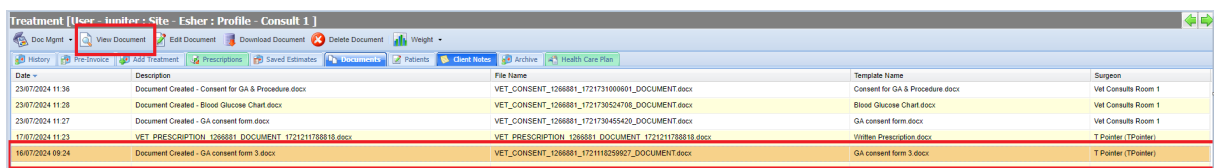
Patient, Compliance & Appointment Reminders = Reception > Documents tab.

Report Wizard = Reception > Documents tab.

The following example shows how to view and modify a Consent form.

View a Document

1. Navigate to the **Treatment History Screen** and select the **Documents tab**.
2. **Double click the file**, or highlight the relevant file and select 'View Document'



Date	Description	File Name	Template Name	Surgeon
23/07/2024 11:36	Document Created - Consent for GA & Procedure.docx	VET_CONSENT_1266881_172173100901_DOCUMENT.docx	Consent for GA & Procedure.docx	Vet Consults Room 1
23/07/2024 11:36	Document Created - Blood Glucose Chart.docx	VET_CONSENT_1266881_1721730524708_DOCUMENT.docx	Blood Glucose Chart.docx	Vet Consults Room 1
23/07/2024 11:27	Document Created - GA consent form.docx	VET_CONSENT_1266881_1721730455420_DOCUMENT.docx	GA consent form.docx	Vet Consults Room 1
17/07/2024 11:23	VET PRESCRIPTION 1266881 DOCUMENT 172121178819.docx	VET_PRESCRIPTION_1266881_DOCUMENT_172121178819.docx	Written Prescription.docx	T Painter (TPainter)
16/07/2024 09:24	Document Created - GA consent form 3.docx	VET_CONSENT_1266881_172111025902_DOCUMENT.docx	GA consent form 3.docx	T Painter (TPainter)

3. The Document will display for the user.

Treatment [User - jupiter : Site - Esher : Profile - Consult 1]

Doc Mgmt View Document Edit Document Download Document Delete Document Weight

History Pre-Invoice

Date

- 23/07/2024 11:36
- 23/07/2024 11:28
- 23/07/2024 11:27
- 17/07/2024 11:23
- 16/07/2024 09:24
- 13/04/2023 14:14

rm-pms.vetspace.cloud/HttpFileDownload

HttpFileDownload 1 / 1 60%

AmerisourceBergen
MWI Animal Health

RM Veterinary Hospital
82 Oak Tree Lane
Esher
GU13 5AX

General Anaesthetic Consent Form

Client ID: 1218010 Patient ID: 1266881
 Client Name: Mr/Mrs M/Mrs J Smith Patient Name: Foxy
 Address: 22 Heron Wood Road ALDERSHOT GU12 4AJ Species: Canine
 Breed: Jack Russell Terrier
 Mobile Number: Age: 6 Years 9 Months 3 Days
 Home Number: Last Fed:
 Items with patient: Medications:

Procedure: General anaesthetic spay

☐ I hereby give permission for the administration of an anaesthetic to the above animal and to the surgical procedures, or other procedures detailed on this form, together with any other procedures which may prove necessary.

☐ The nature of these procedures, and of other such procedures as might prove necessary, has been explained to me.

☐ I understand that there are some risks involved in all anaesthetic techniques and surgical procedures.

☐ I accept that the likely cost will be as detailed on the estimate, and that in the event of further treatment being required or of complications occurring, which will give rise to additional costs, I shall be contacted as soon as practicable so that my consent to such additional treatment and costs may be obtained.

☐ If the veterinary surgeon is unable to contact me on the numbers provided, I understand the veterinary surgeon will act in the best interests of my animal.

☐ In order to protect the welfare of my animal, in the unlikely event of an emergency, or where additional pain relief or sedation may be required, I understand the veterinary surgeon may decide to use medicines that are not authorised for use in Canine.

Would you like a pre-anaesthetic blood test? ☐ E ☐

Would you like intravenous fluid therapy? ☐ E ☐

Estimate: £

☐ If you are NOT the owner, please tick the box to confirm you have the authority to act on behalf of the owner of the animal described above

☐ Please tick the box to confirm you are OVER the age of 18

Signature _____

Print _____

Date of Signature _____

Edit a Document

1. Navigate to the document.
2. Select **Edit Document**. (In this example, we're in a client document).

Treatment [User - jupiter : Site - Esher : Profile - Consult 1]

Doc Mgmt View Document Edit Document Download Document Delete Document Weight

History Pre-Invoice Add Treatment Prescriptions Saved Estimates Documents Patients Client Notes Archive Health Care Plan

Date	Description	File Name	Template Name	Surgeon
23/07/2024 11:36	Document Created - Consent for GA & Procedure.docx	VET_CONSENT_1266881_172173100691_DOCUMENT.docx	Consent for GA & Procedure.docx	Vet Consults Room 1
23/07/2024 11:28	Document Created - Blood Glucose Chart.docx	VET_CONSENT_1266881_172173852478_DOCUMENT.docx	Blood Glucose Chart.docx	Vet Consults Room 1
23/07/2024 11:27	Document Created - GA consent form.docx	VET_CONSENT_1266881_172173845426_DOCUMENT.docx	GA consent form.docx	Vet Consults Room 1
17/07/2024 11:23	VET PRESCRIPTION 1266881 DOCUMENT 1721211788918.docx	VET_PRESCRIPTION_1266881_DOCUMENT_1721211788918.docx	VetPrescription.docx	T Poster (TPoster)
16/07/2024 09:24	Document Created - GA consent form 3.docx	VET_CONSENT_1266881_172118259927_DOCUMENT.docx	GA consent form 3.docx	T Poster (TPoster)

3. The document will generate and allow you to modify.
4. **Make any necessary changes** and the document will auto-save on close.



Note: The editing of documents can be controlled by your close account period. If you want the consolidation date to ignore document editing, head into Settings > Reception and select 'Ignore consolidation date for documents'.

Email a document

1. Search for the client and select the **Documents** tab, or navigate into the patient record and select the **Documents** tab.
2. Right click the relevant document.
3. Select '**Email Document**' or **Email Document as HTML**'

4. The **Merlin Email Client** window now displays.
 5. The client must have an email saved within their Client Details, this will pre-populate into the 'To' field. This can then be amended if necessary. Other email addresses can be copied into the email by clicking the 'Cc' field.
 6. If '**Email Document**' was selected, the document will be an attachment and the user is able to free type the body of the email. If '**Email Document as HTML**' was selected, the document becomes the body of the email and the user can make any amendments before sending.
 7. Press '**Send Email**'
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