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?

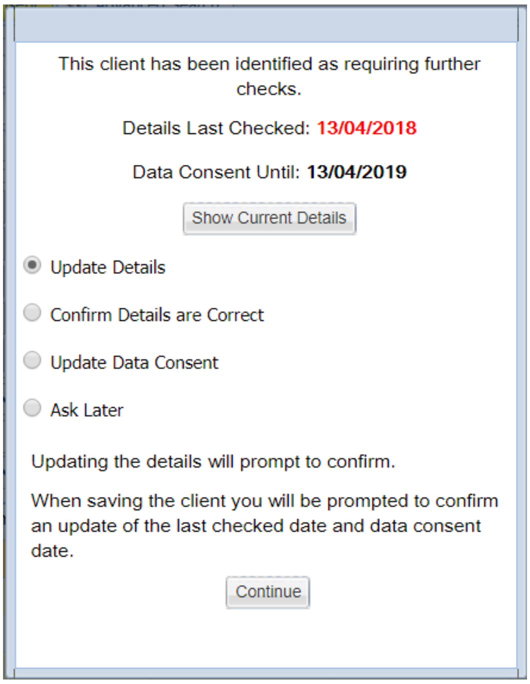
The following changes have been introduced.

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.



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

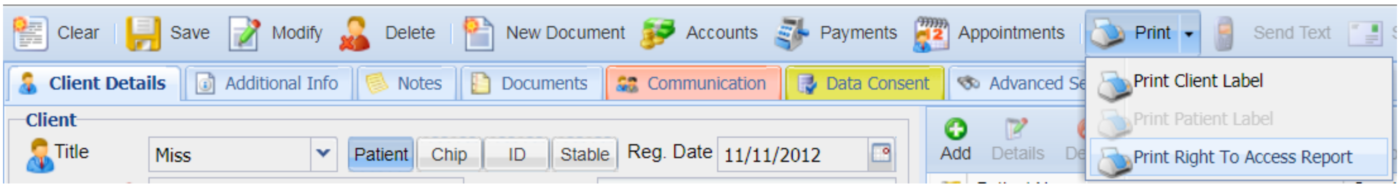
Client Detail Checker Scenario	Cursor Focus	Action on ‘Continue’
A) Details Last Checked Date is earlier than Data Consent Until Date	Update Client Details	System Navigates to Client Details Tab for user to check Client Details.
B) Data Consent Until Date is earlier than Details Last Checked Date	Update 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.

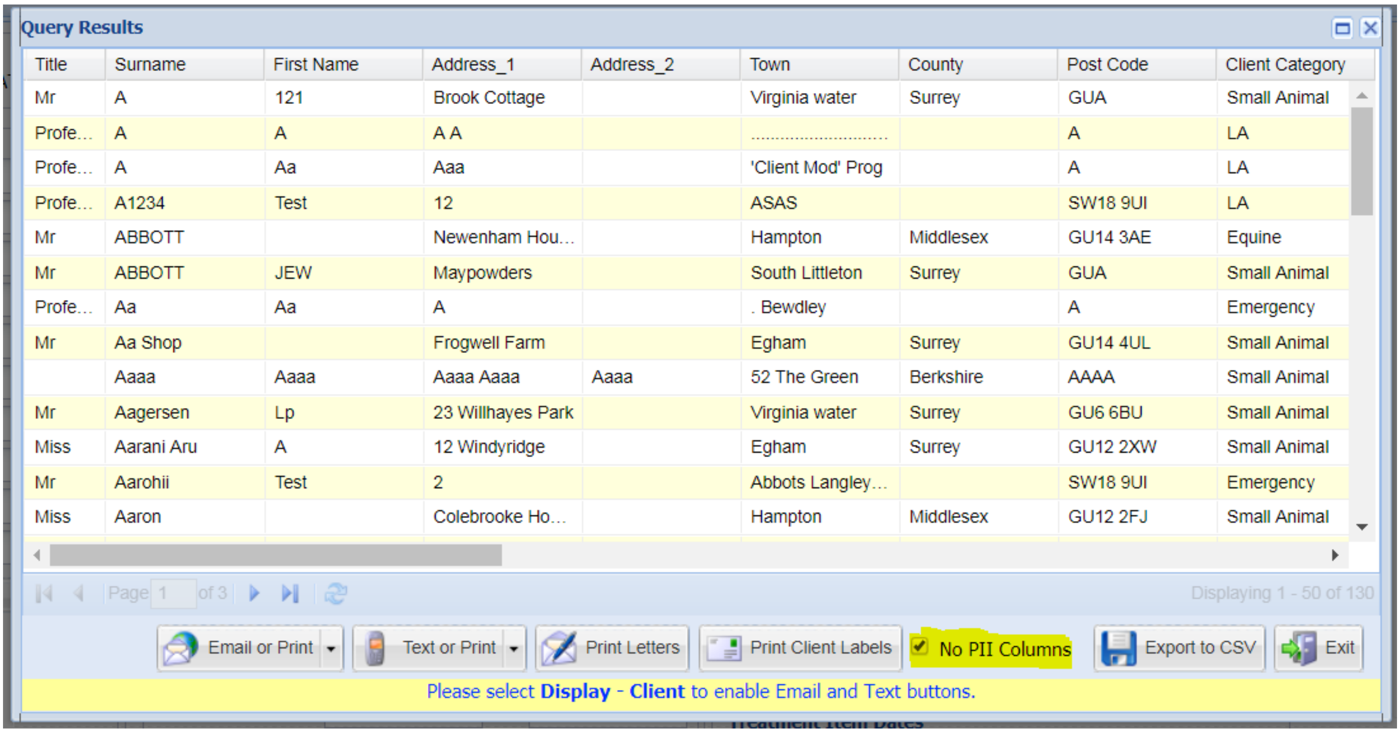


Once selected, a PDF document is generated with the report.

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.



Query Results

Title	Surname	First Name	Address_1	Address_2	Town	County	Post Code	Client Category
Mr	A	121	Brook Cottage		Virginia water	Surrey	GUA	Small Animal
Profe...	A	A	A A		....		A	LA
Profe...	A	Aa	Aaa		'Client Mod' Prog		A	LA
Profe...	A1234	Test	12		ASAS		SW18 9UI	LA
Mr	ABBOTT		Newenham Hou...		Hampton	Middlesex	GU14 3AE	Equine
Mr	ABBOTT	JEW	Maypowders		South Littleton	Surrey	GUA	Small Animal
Profe...	Aa	Aa	A		. Bewdley		A	Emergency
Mr	Aa Shop		Frogwell Farm		Egham	Surrey	GU14 4UL	Small Animal
	Aaaa	Aaaa	Aaaa Aaaa	Aaaa	52 The Green	Berkshire	AAAA	Small Animal
Mr	Aagersen	Lp	23 Willhayes Park		Virginia water	Surrey	GU6 6BU	Small Animal
Miss	Aarani Aru	A	12 Windyridge		Egham	Surrey	GU12 2XW	Small Animal
Mr	Aarohii	Test	2		Abbots Langley...		SW18 9UI	Emergency
Miss	Aaron		Colebrooke Ho...		Hampton	Middlesex	GU12 2FJ	Small Animal

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Email or Print | Text or Print | Print Letters | Print Client Labels | No PII Columns | Export to CSV | Exit

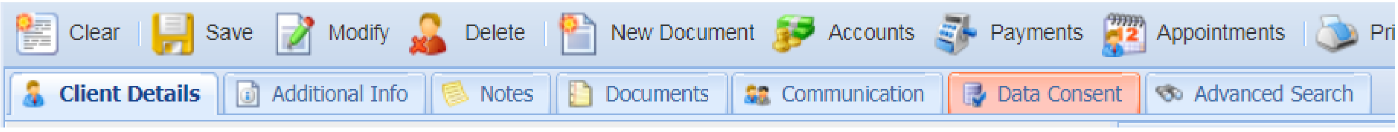
Please select **Display - Client** to enable Email and Text buttons.

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.

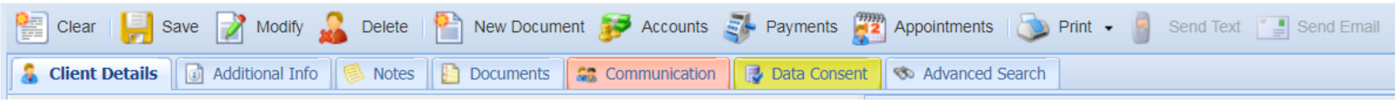
Data Consent Tab Colour Coding

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

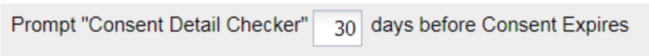
1. **Red** = No Consent or Expired Consent



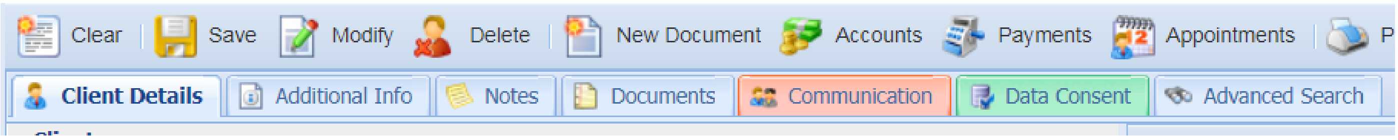
2. **Yellow** = Consent Expiring



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

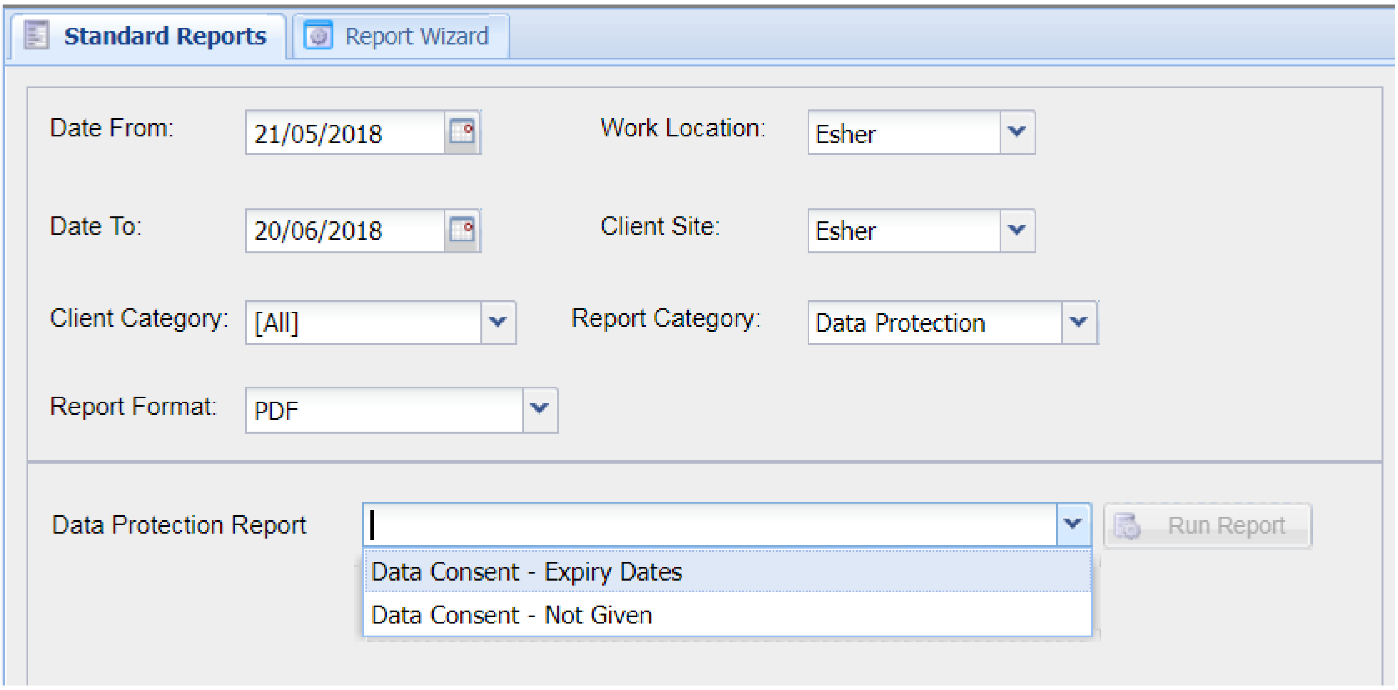


3. **Green** = Consent is valid



Standard Reports

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



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.