

# Patient Libraries

29/07/2025 9:56 am BST

## Summary

This page documents the libraries available under the Patients library.

For information on how to update/sort libraries, see: [How to Use](#)

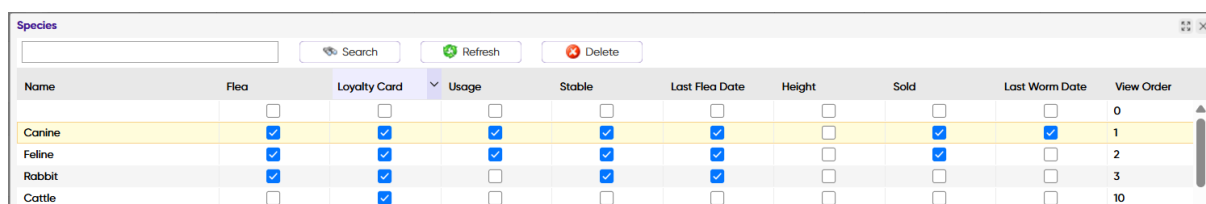
## Details

### Patient Categories

Patient Categories are one level above species in filtering what species, breeds and colours are available to select, therefore making it possible that Large Animal Species and Breeds are not shown under Small Animal for mixed practices.

### Species

The species library is a central point for all species in the system. This library has several unique options which are:



| Name   | Flea                                | Loyalty Card                        | Usage                               | Stable                              | Last Flea Date                      | Height                   | Sold                                | Last Worm Date                      | View Order |
|--------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|------------|
| Canine | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0          |
| Feline | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 2          |
| Rabbit | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | 3          |
| Cattle | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | 10         |

Flea = This option allows you to select the flea prevention type in the patient details screen.

Loyalty Card = This option allows you to enter loyalty card details against the patient.

Usage = Allows the Usage of the patient to be recorded in patient details.

Stable = Allows the recording of the stable information for the patient.

Last Flea = Allows the entry of a Last Flea date in patient details

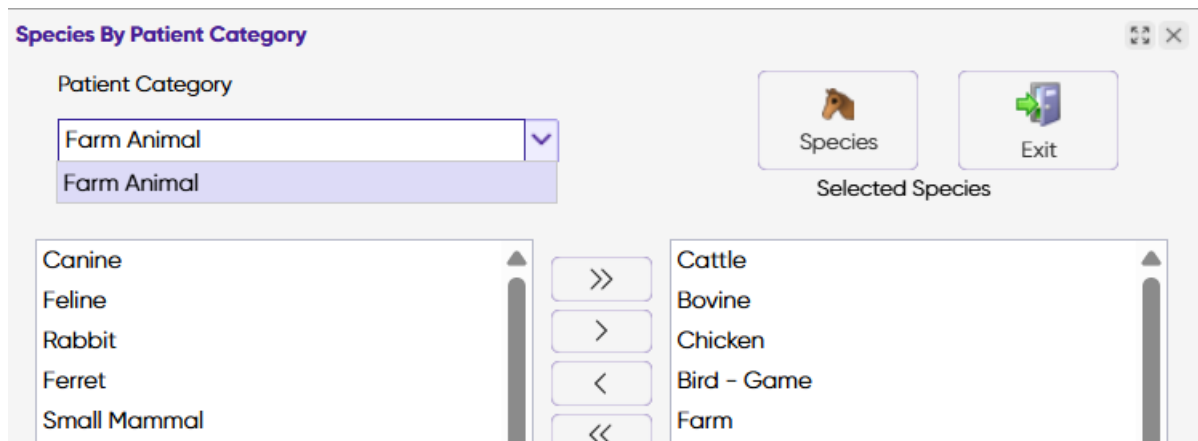
Height = Allows the entry of Height in Patient details.

Sold = Allows the patient to be marked as sold.

Last Worm Date = Allows entry of the Last Worm date in patient details.

### Species by Patient Category

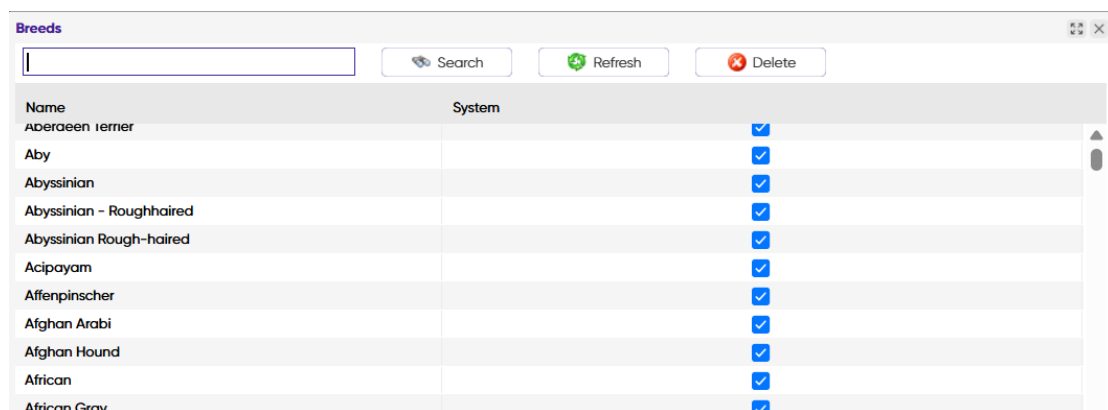
After a species is added it needs to be assigned to a Patient Category in order to be usable.



## Breeds & Breeds by Species

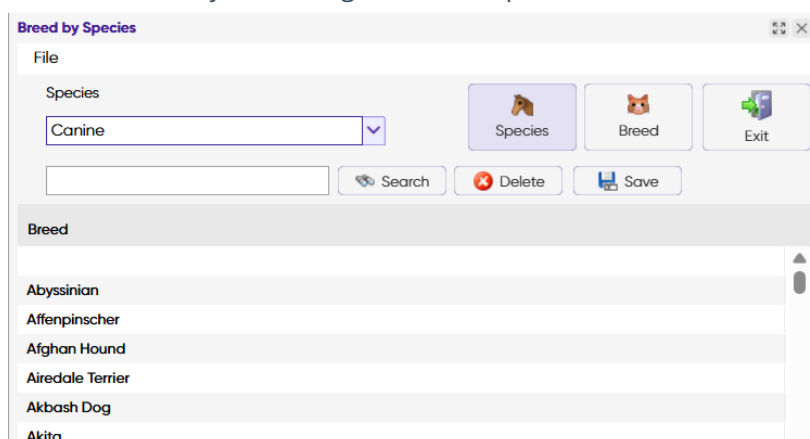
The Breeds library is a central point of all breeds in the system. After a breed is added it needs to be assigned to species in Breeds by Species.

First of all, add the new breed into the breed library:



The next step is to assign the breed to its associated species:

1. Ensure the correct species is selected from the drop down. Once selected, the list of breeds below will only display breeds that have already been assigned to that species.



2. Click into the empty field indicated below and start to type the name of the breed you have previously

added. Merlin will display breeds that match the characters being typed in. Select the correct one and click save.

## Genders & Genders by Species

The gender library allows the configuration of different genders and mapping to the specific sex, for example Male, Neut Male and Gelding genders are mapped to the Sex 'Male'.

| Name        | Description | Neutered Gender | Sex    | Is Neutered                         | Add to Library                      |
|-------------|-------------|-----------------|--------|-------------------------------------|-------------------------------------|
|             |             |                 |        | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Male        | Male        | Neut Male       | MALE   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Neut Male   | Neut Male   | Male            | MALE   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Female      | Female      | Neut Female     | FEMALE | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Neut Female | Neut Female | Female          | FEMALE | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Mare        | Mare        | Mare            | FEMALE | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Stallion    | Stallion    | Gelding         | MALE   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Gelding     | Gelding     | Gelding         | MALE   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

This library has more configuration due to the method of altering gender through treatment option in code entry, the system will prompt to alter the sex of the patient and will automatically selected depending on the configuration here.

The key fields for this configuration are:

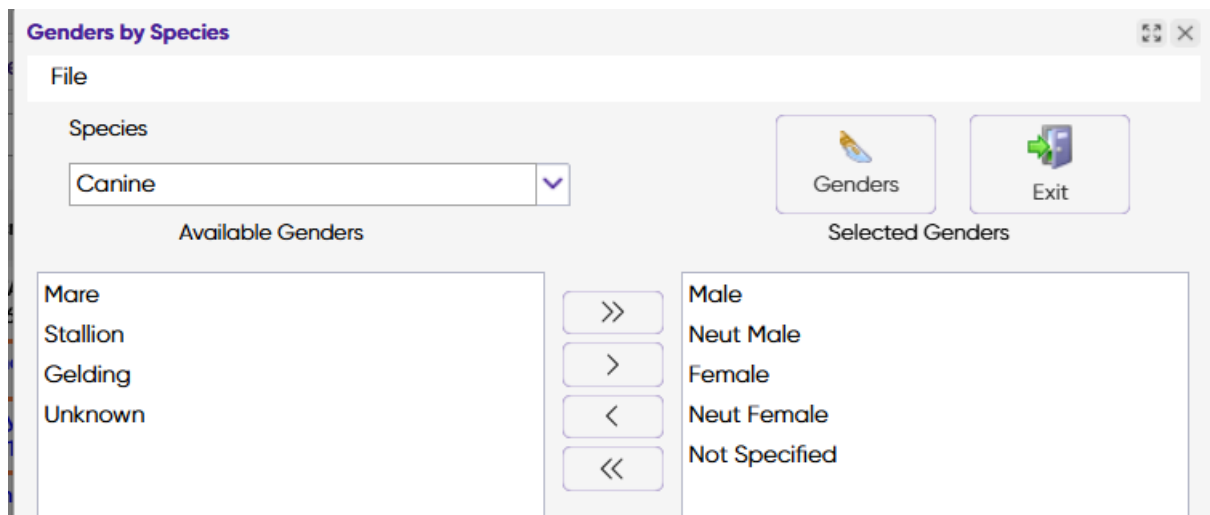
Neutered Gender = This determines which Gender the patient changes to when prompted, therefore Male to Neut Male.

It is a good idea to map back into reverse so Neut Male changes to Male in case a mistake was made and the treatment removed.

Is Neutered = This determines the Gender is the neutered state, if the animal is a neutered state gender you will not be prompted to alter the sex again.

Merlin will prompt the user to alter the gender for code that has 'Alter Sex' enabled within Code Entry.

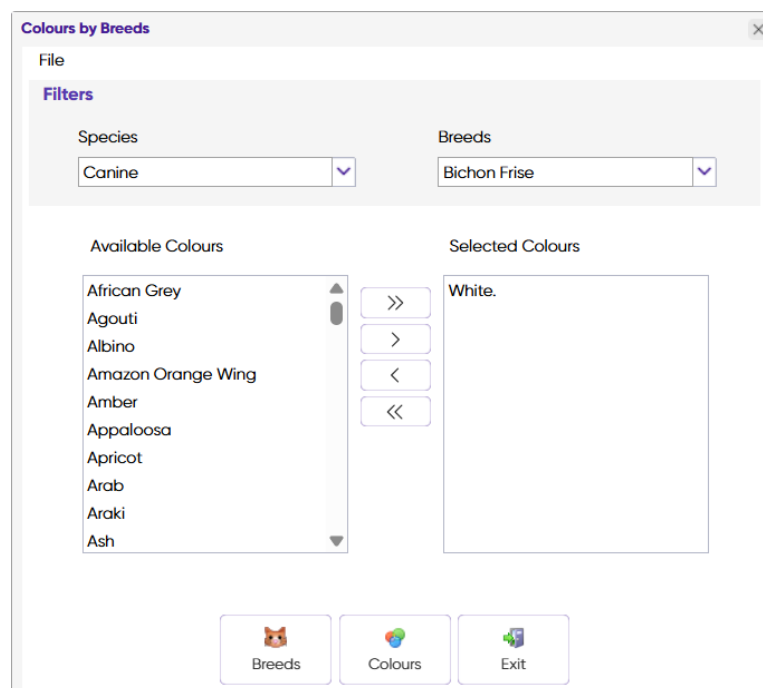
After a gender is added it needs to be assigned to species using the Gender by Species library.



## Colours & Colours by Breed

The colour library is your central point for all colours used for patients in the system.

After a colour is added it needs to be assigned to breed in the Colours by Breed library.



When assigning colours, only those moved into 'Selected colours' will display when registering a patient. If the 'Selected Colours' list is left blank then all colours will be available by default on registration.

Note: Remember there is a Setting to allow Patient Free Text Colours. This allows the user to add a colour when registering a patient and then save it to the database.

**Configuration Settings**

Categories Site

**Reception**

☒ Patient Free Text Colours

## First Opinion & Referral

The first opinion and referral libraries allow the maintenance of the referral module in patient details, the libraries include Categories, Reason, External Referral Reasons, Practice and Practitioners.

From Administration>Patients, then either go into 'First Opinion' or 'Referral'.

### Categories

To create the categories, enter the required information and 'Save'. These can be edited at a later date if required, just make the change and 'Save'

**First Opinion Categories**

| Category Name    | Details   |
|------------------|---|
| General Practice | First Opinion Category *<br><input type="text" value="General Practice"/> |
| General Practice |   |
| Neurology        |   |
| Orthopaedics     |   |

### Reason

To create the reasons, enter the required information and 'Save'. These can be edited at a later date if required, just make the change and 'Save'

First Opinion Reason

Reason Name

Cruciate Rupture

Fracture

Patella Luxation

Refer: Eyes

Refer: Internal Medicine

Refer: Neurology

Refer: Ophthalmic

Refer: Soft Tissue

Refer: Surgery

Referral

Spinal

Details

First Opinion Reason \*

New

Save

Delete

Close

## External Referral Reasons

To create the external referral reasons, enter the required information and 'Save'. These can be edited at a later date if required, just make the change and 'Save'

External Referral Reason

Reason Name

Internal medicine

Owner Request

Details

External Referral Reason \*

New

Save

Delete

Close

## Practice

To create a practice, fill in all the details\* are mandatory fields and 'Save'. If its and external practice tick the tick before saving.

**First Opinion Practice**

| Practice Name      | Details                                    |
|--------------------|--|
| First Opinion Vets | Practice Name * <input type="text"/>       |
| London GP Vets     | Name/No * <input type="text"/>             |
| Mr Jones Vets      | Address * <input type="text"/>             |
|                    | Address <input type="text"/>               |
|                    | Town/City * <input type="text"/>           |
|                    | County <input type="text"/>                |
|                    | Postcode * <input type="text"/>            |
|                    | Tel <input type="text"/>                   |
|                    | Fax <input type="text"/>                   |
|                    | Email <input type="text"/>                 |
|                    | <input type="checkbox"/> External Practice |

## Practitioners

To add the practitioners, select which practice the practitioner is from and fill in all the required information and any notes. and 'Save'

**First Opinion Practitioners**

| Practitioner Name | Details   |
|-------------------|---|
| A FirstOpinionVET | Referral Practice * <input type="text"/>  |
| A Masters         | First Opinion Vets <input type="text"/>   |
| Tom O'Hara        | Title <input type="text" value="Mr"/> <input type="text"/><br>First Name <input type="text" value="Tom"/><br>Surname * <input type="text" value="O'Hara"/><br>Direct Telephone <input type="text" value="07845781000"/><br>Direct Email <input type="text" value="tom@vetspace.co.uk"/><br>Notes<br><div>Works Tues-Fri</div> |

These can also be maintained within a patient's record when recording a referral by the Setting shown below.

Configuration Settings

Categories

Account

Reporting

Diary

Reception

Treatment

Referral

Lab

Vet Scan Lab

Labelling

SMS

Email

DayLists

Site

Esher

Save

Referral

Add Treatment

☒ Do not Show Referral Practice on Save

☐ Show Referral Practice on Save

☒ Allow Editing of Referral/First Opinion details in Referral/First Opinion panels

Referral Template(Main Site):

Referral email.docx