Client Data Consent

30/07/2025 1:23 pm BST

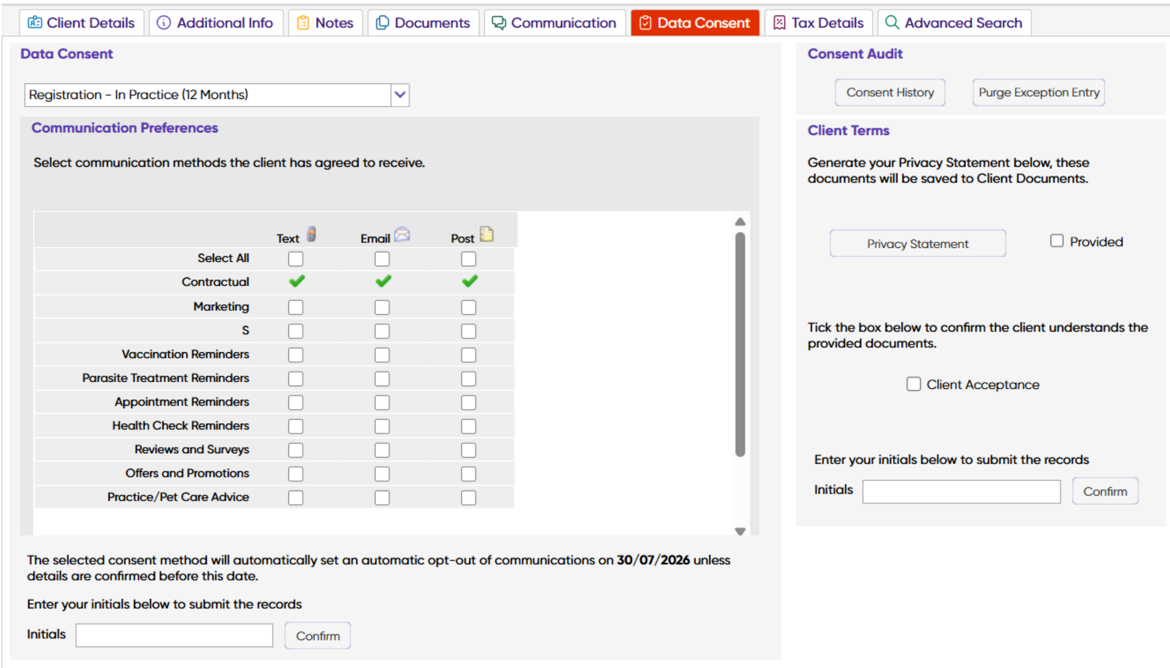
Summary

Influenced by the GDPR legislation, the tab in the Reception Screen labelled 'Data Consent' allows you to record consent and contact preferences for your Clients.

This is the second step when first registering a Client.

Details

The Data Consent Tab can be accessed via the Reception Screen. This screen allows you to record consent and contact preferences for your Clients.

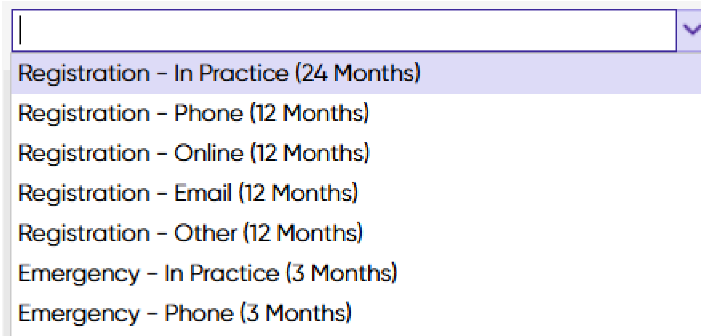


Registering a New Client's Data Consent

Once the initial steps for Registering a Client have been completed and you have selected 'Save' the Data Consent tab will display for completion of consent details and communication preferences.

Data Consent Method

The first step is to specify the Client's Data Consent Method. The Data Consent Method selected determines how long you have the Client's data consent for.



Example: If a client has been registered through the Practice's website, the user can record this through the system and a data consent validity of 12 months may be assigned to this code. Or if an emergency visit was required, the data consent method may be 'Emergency Visit' for which data consent may be valid for 2 Weeks.

Note: The Data Consent Method types and validity lengths are set by your practice, see page: GDPR Administration

To specify a Client's method of consent, select a 'Data Consent Method' from the drop-down list.

Communication Preferences

Once a Client's Data Consent Method has been set, you can set the Client's Communication Preferences. By default all preferences are unticked except contractual (which cannot be changed). Hovering over contractual will give a description of what is deemed contractual communication.

To opt the client into communication for each communication type (listed on the left side), tick the correct checkbox for each communication channel (listed across the top).

	EMAIL	Post	TEXT
Select All	☐	☐	☐
Contractual	✔	✔	✔
Invoices Statements	☐	☐	☐
Vaccination Reminders	☐	☐	☐
Parasite Treatment Reminders	☐	☐	☐
Appointment Reminders	☐	☐	☐
Health Check Reminders	☐	☐	☐
Practice/Pet Care Advice	☐	☐	☐
Reviews and Surveys	☐	☐	☐
Offers and Promotions	☐	☐	☐

Note: Your system administrator can add and remove both types and channels in Merlin to allow your practice to optimise the data entry. For information, see page: GDPR Administration

These communication preferences will be set for the client for the validity length set for the Data Consent Method selected.

For this example, ‘Registration – In Practice’ has a consent validity length of 24 Months. Therefore if the Client has been registered on 23/05/2024, their consent will be valid for 24 months until their consent is automatically opted out of communications.

> The selected consent method will automatically set an automatic opt-out of communications on **23/05/2025** unless details are confirmed before this date.

If a Client’s Consent Validity expires, the status of the Client’s communication will automatically opt-out of all communication preferences minus anything within Contractual communications.
When this occurs you will still be able to send communications under the contractual communication type but no other type.

Ensure when opting in that all the correct options are selected as determined with your client.

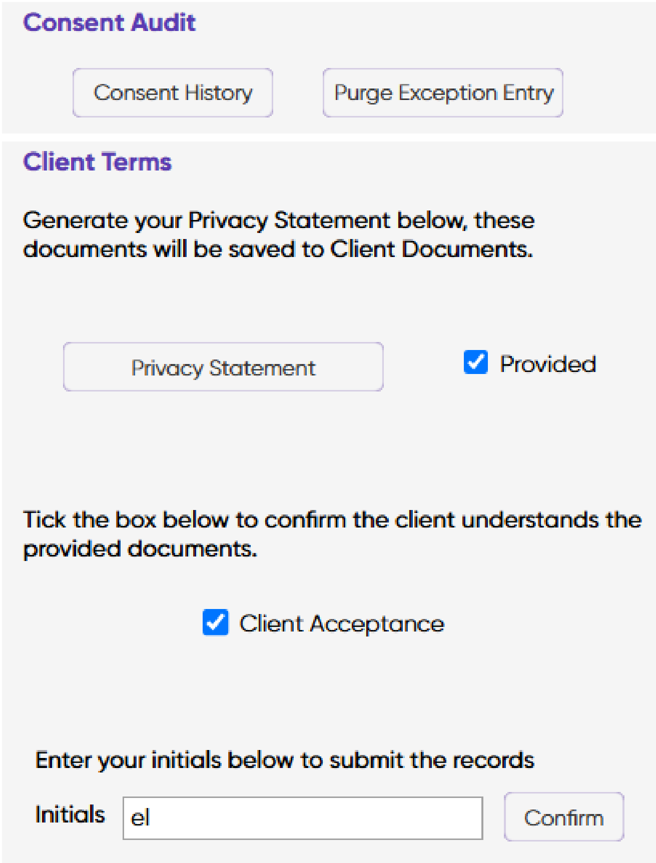
Once Consent has been registered, the user needs to insert their initials and select ‘Confirm’ to record the Client’s Consent. The user can then proceed to the 'Client Terms' section.

Client Terms

This section allows you to record the generation and acceptance of the ‘Privacy Statement. The statement will generate automatically or it can be manually generated using the ‘Privacy Statement’ button.

You may want to generate a document or contract which states clearly to the client during the registration process that you hold the data under legitimate interest and that legislations such as the Veterinary Medicines Regulations require you to hold data for 7 years.

Note: This document to be used as a Privacy statement is specified by the practice. See: GDPR Administration



Consent History = Shows all history of previous data consent gained.

Purge Exception Entry = Allows the user to add in a purge exception reason for this client in order to remove them from any purge runs using the Client Purge Tool.

Privacy Statement Button = Used to manually generate the practice's Privacy Statement.

Provided = Checkbox to record a copy of the documentation has been provided to the client.

Client Acceptance = Used to record that the client has read and accepted your practice's terms and conditions documentation.

Initials = Record which user is confirming the client's acceptance.

Confirm button = Saves the client terms.

Once the above fields have been completed the user can move onto register a Patient.

A summary of the above process is:

1. Enter Data Consent Method.
2. Enter Communication Preferences, initial and confirm.
3. Generate Privacy Statement, initial and confirm.

Updating an Existing Client's Data Consent

A Client's data consent preferences can be modified at any time.

When selecting a Client in Reception, the data consent tab is coloured to reflect their consent status.

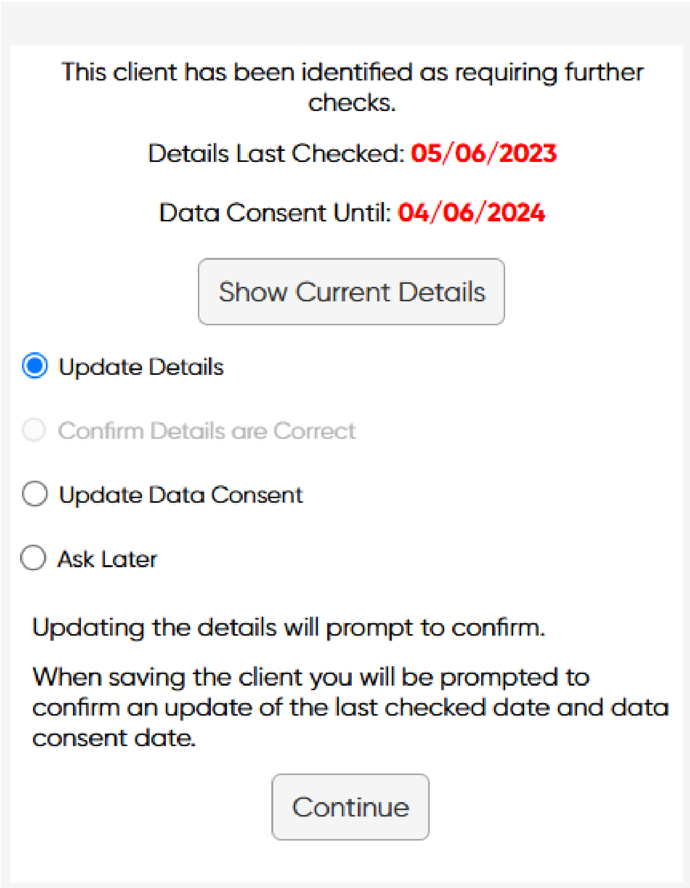
Red = No Consent or Expired Consent

Amber = Consent is Expiring soon

Green = Consent is valid

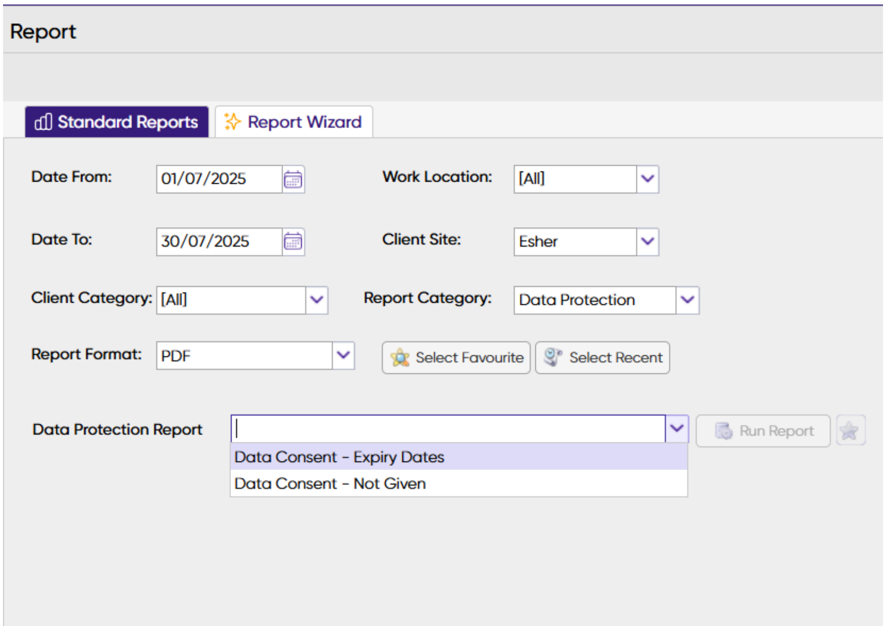
How do I know when a Client's Data Consent has expired?

When selecting a Client with expired data consent, users will be prompted by the Client Detail Checker functionality when they select their client record.



As above, their data consent tab within Client Details will be red in colour.

Additionally, there is a Data Consent report that can be run within [Standard Reports] > Data Protection that will list clients with no registered data consent or expired consent.

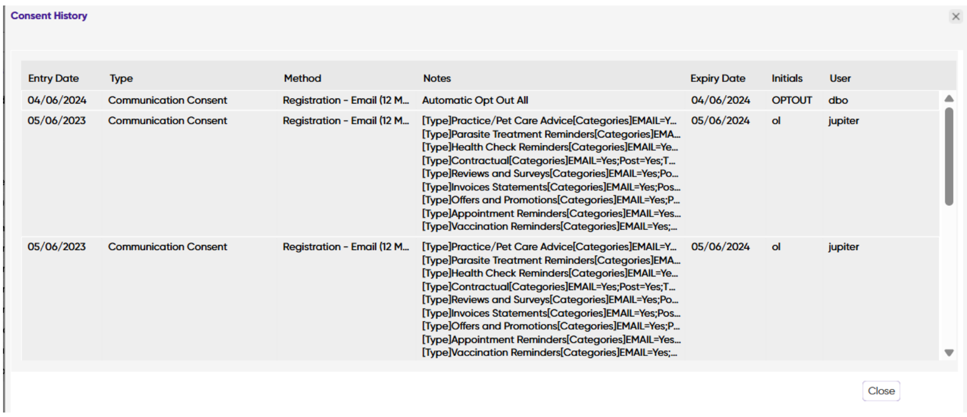


Data Consent History

A Client's data consent history is audited and can be viewed from the Client's Data Consent Screen.

1. Navigate to a Client's Data Consent tab.
2. Select the 'Consent History' button (right-hand side).
3. The Client's data consent history is displayed.

This screen records the type of consent, the method of consent, the communication preferences, the consent expiry date and the initials/username of the user who registered the consent.



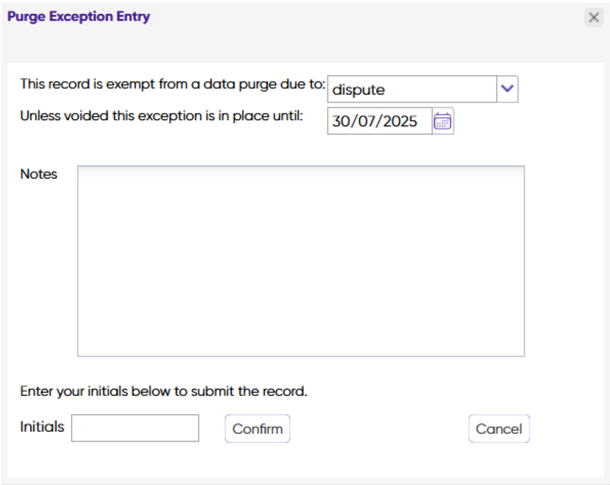
Purge Exception

A data purge is a process in which a clients data will be removed because business determines that the data is no longer relevant under the GDPR (General Data Protection Regulations). Adding an exception will stop the clients record from being purged when there is a legitimite purpose for the retention of this data.

For more information on how data purges work see this page: Client Purge Tool.

Add a Purge Exception

1. Navigate to the Client's 'Data Consent' tab.
2. Select ‘Purge Exception Entry' button.
3. The following window will display which allows you to record a Purge Exception Reason, the date the exemption is valid until and record any notes along with the user’s initials



Note: The exemption reasons can be added to within the Purge Exception Reason library area of Merlin.

4. The Client will then be exempt from a Data Purge until the date specified. This is recorded in the Consent History section for your records.