User Roles

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Summary

User Roles are security permissions that can be assigned/unassigned to users according to job roles. By default a practice will begin with Actions/Folders for Administrator, Manager & Receptionist.

A practice can then create their own Actions/Folders to suit job roles and requirements. Generally an Administrator has full permissions.

Remember every role requires one set of Actions and Folders eg Manager - Actions & Manager - Folders.

Details

Below is the workflow to create new roles and users and an overview of the available permissions in Merlin:

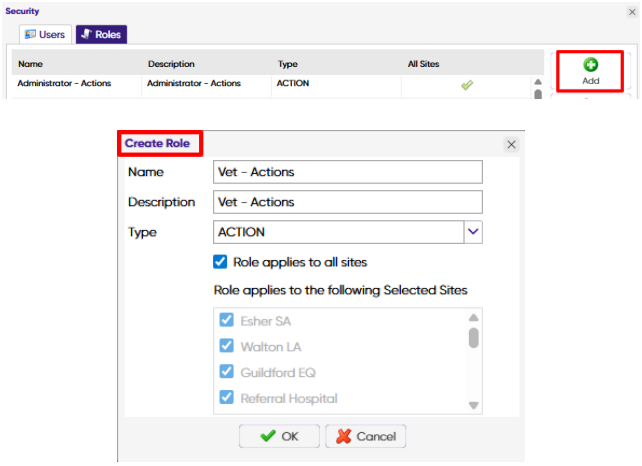
Creating new Roles & Actions

Navigate to Administration > System > Security and select the 'Roles' Tab.

You can edit existing actions & folders by selecting one from the existing list then using the left and right arrows to move across selected actions and folders.

Those in the right hand column named 'Selected' are the one's that will be in use.

To add a new set, click 'Add' from the right hand side.



Input the name i.e "Vet - Actions" , the description and the type. The new role will need both an action and folder type so this set up will need to be repeated to create i.e "Vet - Folders".

Select whether the new role will be available for all sites or place a tick in the boxes of the required individual sites.

Once created, select them from the list and use the left and right arrows to move across the relevant folders the role can access, followed by the actions.

If you ever want to delete a set of roles, you must ensure there are no users assigned to them.

Actions/Permissions Overview

Accounts

Account - Backdate Transaction

Allows the user to backdate a transaction

Accounting Utilities - Add Price Deviation

Allows the user to add a price deviation in Code Entry, (Applicable to branches only).

Accounting Utilities - Delete Price Deviation

Allows the user to delete a price deviation

Accounts - Apply Early Settlement Discount

Allows the user to add Early Settlement Discount to a clients account

Accounts - Apply Expired Early Settlement Discount

Allows the user to add Early Settlement Discount to a clients account.

Accounts - Bounce Cheque

Allows the user to Bounce Cheque Payments.

System Maintenance - Cashing up Payment Types

Allows the user to access Cashing up Payment Types

Accounts - Cashing Up

Allows the user to use the Cashing up feature of Daily Cash/Till Takings Tab.

Accounts - Cashing Up Clear

Allows the user to clear another users in progress Till Takings session.

Accounts - Credit

Allows the user to credit a clients account, (including items returned not for cash).

Accounts - Delete Item

Allows the user to delete a single item from the clients account screen.

Accounts - Discount

Allows the user to add a discount to the clients account.

Accounts - Edit Credit VAT

Allows the user to apply a VAT rate, via a drop down option to a monetary credit from the clients account screen.

Accounts - Edit Discount VAT

Allows the user to edit the discount VAT

Accounts - Edit Surcharge VAT

Allows the user to edit the surcharge VAT

Accounts - Edit Write Off VAT

Allows the user to edit the write off VAT

Accounts - Invoice Change Date Credit

Allows the user to change the date of a credit.

Accounts - Invoice Change Date Payment

Allows the user to change the date of a payment.

Accounts - Invoice Change Date Treatment

Allows the user to change the date of an payment when right clicking on the payment in the clients account.

Accounts - Opening Balance Creation

Allows the user to create an opening balance for a client.

Accounts - Payment

Allows the user to take a payment on a clients account.

Accounts - Refund

Allows the user to refund an item (this returns payments).

Accounts - Return Payment

Allows the user to return a payment in full to a client or return a client in credit.

Accounts - Run Daily Cash

Allows the user to run and view the daily cash screen.

Accounts - Setting Close Accounting Period

Allows the user to change the systems close accounting period.

Accounts - Surcharge

Allows the user to surcharge a clients account.

Accounts - Surcharge Reversal

Allows the user to reverse the surcharge fees applied to a clients account.

Accounts - Un-Allocate Payments against Invoices

Allows the removal of allocation against the selected payment in the clients account within "View Allocations".

Accounts - Write Off

Allows the user to write off fully or partially a clients account.

Accounts - Write Off Reversal

Allows the user to reverse the write off on the clients account.

Accounts Category - Add

Allows the user to add new account categories to the System.

Accounts Category - Delete

Allows the user to delete account categories from the system.

Accounts Category - Edit

Allows the user to modify the account categories.

Appointments

Appointment Reminder - Manual Send

Allows the user to manually send appointment reminders.

Appointment Reminder Schedule - Add

Allows the user to add an appointment reminder schedule.

Appointment Reminder Schedule - Delete

Allows the user to delete an appointment reminder schedule.

Appointment Reminder Schedule - Edit

Allows the user to edit an appointment reminder schedule

Client

Client - Add

Allows the user to add new clients in the reception screen.

Client - Add/Edit Digital Account

Allows the user to add/edit a digital account in the reception screen.

Client - Delete

Allows the user to deactivate a client from the system.

Client - Delete Communication

Allows the user to delete client communication from the system.

Client - Detail Checker

Enables the Client Detail Checker prompt for the user.

Client - Edit

Allows the user to edit the clients information.

Client - Edit Treatment VAT

Allows the user to edit the treatment VAT.

Client - Undelete

Allows the user to reactivate a Client.

Code Entry

Code Entry - Add Code

Allows the user to add a new code in Code Entry.

Code Entry - Delete/Undelete Code

Allows the user to delete the code, and undelete it from the code archive.

Code Entry - Discounts

Allows the user to add discount categories to codes in Code Entry.

Code Entry - Edit Code Default Note Information

Allows the user to change the default label information.

Code Entry -Edit Code Information

Allows the user to change the Code information (supplier / description).

Code Entry - Edit Code Prescriptions

Allows the user to change the Prescription information.

Code Entry - Edit Code Pricing Information

Allows the user to change pricing information (Qty/pk, markup, etc).

Code Entry - Edit Code Recall Information

Allows the user to change the Reminder information (reminder length.

Code Entry - Edit Code Send To Information

Allows the user to change the Send To settings on the Send To page.

Code Entry - Edit Code Treatment Options

Allows the user to change the options on the Treatment Options page.

Code Entry - Edit Price Deviation

Allows the user to edit existing price deviations.

Code Entry - Edit Product Alert

Allows the user to edit Product Alerts.

Code Entry - Edit Species

Allows the user to edit Species assigned to codes.

Code Entry - Hide/Unhide

Allows the user to hide or Unhide codes at the site they are logged in to.

Code Entry - Prevent Hiding Code

Allows the user to toggle the prevent hiding code option.

Code Entry - Track Main Site

Allows the user to toggle codes to track the main site price.

Compliance Reminder Schedule

Compliance Reminder - Manual Send

Allows to manually end a Compliance Reminder to a Client.

Compliance Reminder Schedule - Add

Allows the user to add a new Compliance Reminder Schedule.

Compliance Reminder Schedule - Delete

Allows the user to delete a Compliance Reminder Schedule.

Compliance Reminder Schedule -Edit

Allows the user to edit a Compliance Reminder Schedule.

Composites

Composite - Add

Allows the user to add a composite item.

Composite - Delete

Allows the user to delete a composite item.

Composite - Edit

Allows the user to edit a composite item.

Composite - Reminders Main Only

Allows the user to specify in the composites window that only the parent item will generate a reminder record.

Composite - View Order

Allows the user to change the view order for composite items.

Debtors

Debtors - Run
Allows the user to run debtors.

Diary

Diary - Add Appointment

Allows the user to add an appointment to the diary.

Diary - Add Availability

Allows the user to add new availability on the diary.

Diary - Add Special Surgeon

Allows the user to add a new ‘Special’ surgeon to the system (Operations, Hospital, etc).

Diary - Add Surgeon

Allows the user to add a normal surgeon to the system (actual person).

Diary - Delete Appointment

Allows the user to delete an appointment from the diary.

Diary - Delete Availability

Allows the user to delete availability from the system.

Diary - Delete Surgeon

Allows the user to deactivate a surgeon from surgeon list in the diary.

Diary - Edit Appointment

Allows the user to edit existing appointments.

Diary - Edit Availability

Allows the user to edit the existing Surgeon availability.

Delete - Edit Special Surgeon

Allows the user to edit a “Special” surgeons details (Operations, Hospital etc).

Delete - Edit Surgeon

Allows the user to change a surgeons details (includes marking as deleted).

Delete -Edit Surgeon Type

Allows the user to change a surgeons type (to hospital, surgeon, operations).

Delete - Set Time-slot Available

Allows the user to remove the unavailable marker in the diary.

Delete - Set Time-slot Unavailable

Allows the user to add an unavailable marker in the diary time slots.

Delete - Undelete Surgeon

Allows the user to undelete a deleted surgeon.

Delete - Update Appointment Status

Allows the user to change appointment status, i.e. to paid/unpaid.

Documents

Documents - Manage Main Site Templates

Allows the User to publish Document Templates to all sites.

Documents - Manage Templates

Allows the User to publish Document Templates to the local site

Eligibility

Eligibility - Edit Support Reference Number

Allows the user to change the support reference number in the eligibility tab in reception.

Eligibility Override - Animal cannot be registered

Allows the user to override the Patient Active rules, assigned to supervisors for overriding the notification stopping activation

Email

Email - Send Email to Client

Allows the user to send Emails to clients (Accounts, Reception). (Requires additional licensing and clients email addresses).

Email - Send Marketing Emails

Allows the user to send Emails to clients from the Report Wizard. (Requires additional licensing and clients email addresses)

Health Care

Health Care - Add

Allows the user to add a HCP.

Health Care - Delete

Allows the user to delete a HCP.

Health Care - Edit

Allows the user to edit a HCP.

Health Care - End Plan

Allows the user to end a Health Care Plan within the Accounts screen.

Health Care - Renewals

Allows the user to renew plans as required

Health Care - Save as New

Allows the user to 'Save As New' within the HCP setup screen.

Health Care - Suspend Plan

Allows the user to manually suspend the Health Care Plan, removing any benefits of the plan during treatment.

Health Care - Unsuspend Plan

Allows the user to manually unsuspend the Health Care Plan, allowing continuation of benefits of the plan during treatment.

Health Plan Treatment Group - Add

Allows the user to Add new Treatment Groups in the HCP Admin screen.

Health Plan Treatment Group - Delete

Allows the User to delete Treatment Groups in the HCP Admin Screen.

Health Plan Treatment Group - Edit

Allows the user to edit the default settings for Treatment Groups in the HCP Admin Screen.

Health Care Accounts - Refund

Allows the user to refund money for a HCP account.

Health Care Accounts - Return Money

Allows the user to refund money for a HCP account.

Health Care Accounts - Write Off

Allows the user to write off a HCP account.

Kennels

Kennels - Kennel Add

Allows the user to Add a Kennel

Kennels - Kennel Edit

Allows the user to Edit a Kennel

Kennels - Kennel Remove

Allows the user to remove a Kennel

Kennels - Ward Add

Allows the user to add a Ward

Kennels - Ward Edit

Allows the user to edit a Ward

Kennels - Ward Remove

Allows the user to remove a Ward

Labs

Lab Request - Add

Allows the user to create a new lab request.

Lab Request - Category – Add

Allows the user to add lab categories.

Lab Request - Category – Delete

Allows the user to delete lab categories.

Lab Request - Delete

Allows the user to delete lab requests.

Lab Request - Results - Save

Allows the user to save results to lab requests made.

Lab Request - Save

Allows the users to save the lab requests.

Patient

Patient - Add

Allows the user to add a new patient on a client.

Patient - Add/Edit/Delete First Opinion Parameters

Allows the user to Add/Edit/Delete First opinion referral details.

Patient - Add/Edit/Delete Referral Parameters

Allows the user to Add/Edit/Delete Referral details.

Patient - Compliance Reminder - Delete

Allows the user to delete Compliance Reminder.

Patient - Compliance Reminder - Edit

Allows the user to edit Compliance Reminder.

Patient - Delete

Allows the user to mark the patient as deleted.

Patient - Edit

Allows the user to modify the patient details.

Patient - Euthanize

Allows the user to set the patient as Euthanized.

Patient - Patient Reminder - Add

Allows the user to manually add a Reminder to a patient.

Patient - Patient Reminder - Delete

Allows the user to delete reminders from a patient.

Patient - Patient Reminder - Reactivate

Allows a user to reactivate reminders.

Patient - Reset In-Treatment Status

Allows the user to remove the In-Treatment status flag from appointments.

Patient - Transfer Patient

Allows the users to transfer the patient ownership between clients.

Patient - Undelete

Allows the user to undelete patients.

Patient - Un-Euthanize

Allows the user to un-euthanize patients.

Patient - Weight Add

Allows the user to add weights to a patient.

Patient - Weight Delete

Allows the user to delete a single weight.

Patient Reminder Schedule

Patient Reminder - Manual Send

Allows to manually send a Patient Reminder to a Client.

Patient Reminder Schedule - Add

Allows the user to add a new Patient Reminder Schedule.

Patient Reminder Schedule - Delete

Allows the user to delete a Patient Reminder Schedule.

Patient Reminder Schedule - Edit

Allows the user to edit a Patient Reminder Schedule.

Report Wizard

Extract PII

Allows user to extract PII data from the Report Wizard.

Security

Security - Access

Allows the user access to the security module of the system

Security - Add Role

Allows the user to add a new security role

Security - Add User

Allows the user to create new users

Security - Assign User License

Allows the user to assign a license to a user

Security - Assign/Un-Assign Actions/Folders

Allows the user to assign Security Actions/Folders to users

Security - Assign/Un-Assign Roles to Users

Allows the user to assign Security roles to users

Security - Change User Password

Allows the user to change a user's password

Security - Delete Role

Allows the user to delete a role from a user

Security - Disable User

Allows the user to disable a user

Security - Edit Postcode Area

Allows the user access to the configuration of the Postcode area library.

Security - Edit Report Mapping

Allows the user to access and change the Report Mapping for users.

Security - Edit Role

Allows the user to edit a role

Security - Edit User

Allows the user to edit a user

Security - Enable User

Allows the user to enable a user

Security - Logoff Users

Allows the user access to force users to logoff

Security - Remove User

Allows the user to remove a user

Security - Roles for all Sites

Allows the user to set roles for all Sites

SMS

SMS - Add SMS Template

Allows the user to add SMS templates.

SMS - Delete SMS Template

Allows the user to delete SMS templates.

SMS - Edit SMS Template

Allows the user to edit SMS templates

SMS - Send Ad Hoc Texts

Allows the user to send SMS via Utilities > SMS > Send Text.

SMS - Send Marketing Texts

Allows the user to send SMS via reports wizard.

SMS - Send Text To Client

Allows the user to send a text to a Client.

Stock Control & Stock Centre

Stock Control - Access

Allows the user access to the Stock Control screen under Utilities.

Stock Control - Adjustment

Allows the user access and control within the Stock Adjustment screen.

Stock Control - Evaluation

Allows the user access and control within the Stock Evaluation screen.

Stock Control - Level

Allows the user access and viewing of the Stock Level screen.

Stock Control - Movement

Allows the user access and viewing of the Stock Movement screen.

Stock Control - Transfer

Allows the user access and control within the Stock Transfer screen.

Stock Control - Variance

Allows the user access and control within the Stock Variance screen.

Stock Centre - Setup

Allows access and full control of the stock control screen under the Administration menu.

Stock Control - Batch Edit

Allows the user to edit batch numbers from the Stock Adjustment screen in wholesale.

Stock Control - Edit Code Stock Levels

Allows the user to alter the current stock levels in code entry.

Stock Control - Zero Stock Levels

Allows the user to bulk change stock levels for all selected products to zero.

Treatment

Treatment - Add Estimate

Allows the user to add estimates.

Treatment - Add Free Text Treatment

Allows the user to add manual treatment without prices.

Treatment - Add Insurance

Allows the user to add to insurance.

Treatment - Add Items to an existing Invoice

Allows the user to add items to existing invoices.

Treatment - Add Manual Treatment

Allows the user to add manual treatments

Treatment - Add Treatment

Allows the user to add treatment.

Treatment - Allow Flexible VAT on Manual Treatment

Allows the user to change VAT on Manual Treatments.

Treatment - Allow Treatment Time Override

Allows the user to override the time when adding a treatment.

Treatment - Authorise Repeat

Allows the user to authorise repeat from the treatment history screen.

Treatment - Batch Add

Allows the user to add batch numbers.

Treatment - Batch Delete

Allows the user to delete batch numbers.

Treatment - Batch Edit

Allows the user to edit batch numbers.

Treatment - Delete Estimate

Allows the user to delete estimates.

Treatment - Delete Insurance

Allows the user to delete insurance.

Treatment - Edit Clinical Notes

Allows the user to edit consult notes from treatment history; Accounting Period still applies.

Treatment - Edit Dispensing Fee

Allows the user to edit dispensing fees; Accounting Period still applies.

Treatment - Edit Document

Allows the user to edit documents from treatment history; Accounting Period still applies unless the setting isolating documents from the accounting period is active.

Treatment - Edit Lab Results

Allows the user to edit Lab Results; Accounting Period still applies.

Treatment - Edit Treatment Draft

Allows the user to edit the treatment draft; Accounting Period still applies unless the setting to allow item date in any time is active.

Treatment - Edit Treatment History

Allows the user to edit item in the treatment history; Accounting Period still applies.

Treatment - Edit Treatment Treatment Label

Allows the user to edit treatment labels; Accounting Period still applies.

Treatment - Pre-Invoice Delete

Allows the user to delete pre-invoice.

Treatment - Pre-Invoice Edit

Allows the user to edit pre-invoice.

Treatment - Pre-Invoice Save From

Allows the user to change the save from date for pre-invoice.

Treatment - Pre-Invoice Save To

Allows the user to change the save to date for pre-invoice.

Treatment - Transfer

Allows the transfer of treatment between patients.

Treatment - View Document

Allows the user to open documents in the treatment screen.

Treatment - View Formulary PDF

Allows the user to open the formulary document link on the fast track bar.

Wholesale

Wholesale - Access

Allows access to the Wholesale screen from the Utilities menu.

Wholesale - Admin

Allows access to the Wholesale Admin setup screen from within the Wholesale screen.

Wholesale - Import Prices

Allows the user to import the latest prices from suppliers.

Wholesale - New Order

Allows the user to create and send new orders to suppliers.