

# Practitioners

16/06/2026 10:17 am BST

## Summary

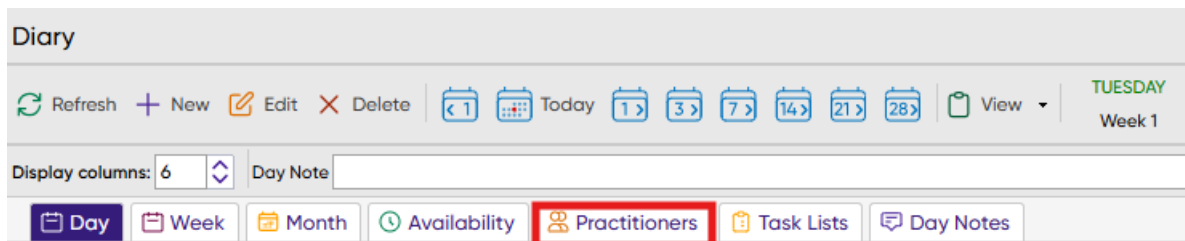
The Practitioner list is essentially a list of all the clinical staff who work at the practice. Any member of staff who uses Merlin to dispense treatment, write clinical notes, weigh animals etc, should be registered on the practitioner list.

Based off of these practitioners, users are able to create diary columns to hold their appointments.

Users can also create diary columns for actions, operation appointments, hospital appointments etc. These are known as 'Task Lists' and they run untimed.

## Details

The Practitioner tab can be accessed via the Diary screen.



## Adding a Practitioner

1. Navigate to the Diary > Practitioner Tab.
2. Select 'Add Practitioner'
3. Populate the Practitioner Details:

A screenshot of the 'Add Practitioner' dialog box. The dialog has a title bar 'Add Practitioner' and a close button. Below the title bar is a section titled 'Practitioner Details' with a purple header. The form contains the following fields and options:

- Surname: Text input field
- First Name: Text input field
- User: Dropdown menu with '<Not Assigned>' selected, and a checkbox for 'Deactivated'
- Site View Order: Text input field with '0', and checkboxes for 'Display in Diary' and 'Display in Treatment'
- Qualification: Dropdown menu
- Mobile Device No.: Text input field
- License No.: Text input field

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

User = Used to assign a Surgeon to a user. When adding a treatment, if your user is assigned to a Surgeon, the surgeon will be highlighted when the surgeon list appears.

Site View Order = This value determines the order in which the surgeon is displayed in the diary and on the surgeon list. Setting this value to the same number will order surgeons alphabetically.

Display in Diary = If ticked, the surgeon will automatically be added to the 'Availability' list.

Qualification = A field to record a Surgeon's qualification i.e. MRCVS, RVN or SQP. Note - these are set up with the Merlin library area of Administration > Qualifications.

Mobile Device No. = A field to record a Surgeon's contact number.

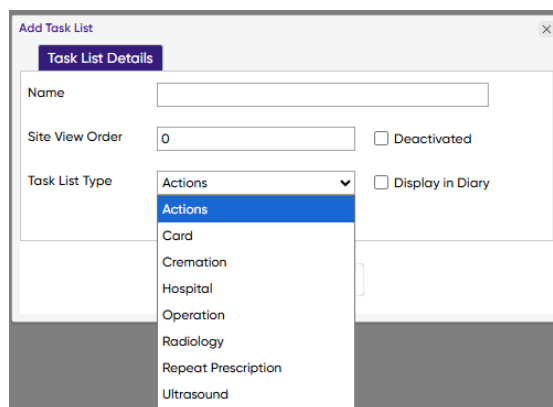
License No = A field to record a Surgeon's RCVS registration number. This will show on Written Prescriptions if the merge field has been used.

4. Select 'Save', the Practitioner will now appear in the 'Availability' screen

## Adding a 'Task List'

The Surgeons list is also used to create diary columns for actions, operation appointments, hospital appointments etc. These are known as 'Task Lists'.

1. Navigate to the Diary > Task lists Tab.
2. Select 'Add Task List'
3. Enter a name for the Task list
4. Populate the details and select the relevant 'Task List Type' i.e. Actions. (see below for more information)



5. Tick 'Display in Diary'
6. Select 'Save', the column will display in the diary screen.
7. For more information on these surgeon types, see 'Daylist Administration'.

## Deactivating a Surgeon

1. Double-click on the Surgeon
2. Tick the 'Deactivated' checkbox

3. Select 'Save'
4. The Surgeon will be deactivated and removed from the list of Surgeons.

Note: *To show deactivated Surgeons, select the 'Show Deactivated' button.*

## **Surgeons at Multi-sites**

For multi-site practices, Surgeons may work across multiple branches and have availability across multiple sites.

Best practice is to use the Surgeons/Sites administration tool to assign surgeons to multiple sites rather than creating duplicates.

For more information see the [Site Administration](#) page.

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