

# 11.03. Prescription payments and credits

## Prescription payment preferences

To receive payments for prescriptions in a dispensary, go to **Dispensary Mode Preferences** and check the **Receive payments from prescription window** box.

Once activated, a **Payment** tab will appear in the *Prescription Entry* window:

The screenshot shows the 'Prescription Entry' window. The 'Payment' tab is selected and highlighted with a red box. The window contains various fields for patient details, prescriber information, and a table for items. The 'Amount paid by patient' field is visible at the bottom right, set to 0.00. The 'Subtotal' is 300.00, and the 'Total' is also 300.00. The 'Amount Outstanding' is 0.00. The 'OK' button is highlighted in blue.

Line	Location	Item Name	Quan	Pa...	Batch	Exp date	Sell Price	Price exten
1		ABACAVIR 300 MG CP	2	1	fgb1234	31/07/20...	150.00	300.00

## Entering the payment

To enter a payment from the Prescription Entry window:

1. Click on the **Payment** tab.
2. Enter the amount to be paid for this invoice today in the **Amount paid by patient** field, then press the *Tab* key on the keyboard:

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 00/00/00 Female ☐ Store: AKPESSEKRO (CSR-D PUBLIC)

New Patient Code: testp01 Address: Entered: 27/04/2020

Prescriber: Search Prescriber Confirm date: 00/00/00 Invoice: 209

Code: Prescription date: 27/04/2020 Entered by: Sussol

**Items: Payment**

This invoice will be automatically finalised if a payment is entered.

Cheque #:

Note:

Invoice total: 300.00

Total outstanding: 300.00

Available credit: 0.00

Amount paid by patient: 300.00

Amount paid by credit: 0.00

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt OK & Next Delete OK

In this example, the invoice is \$300 and the patient will pay the full cost today in cash.

3. A confirmation window will open:

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 23/11/1974 Female ☐ Store: AKPESSEKRO (CSR-D PUBLIC)

New Patient Code: Testp01 Address: Entered: 04/06/2020

Prescriber: Search Prescriber Confirm date: 00/00/00 Invoice: 431

Code: Prescription date: 04/06/2020 Entered by: Sussol

**Items: Payment**

**Other details**

This invoice will be automatically finalised if a payment is entered.

Cheque #:

Note:

**To Pay**

Invoice total: 300.00

Total to pay: 300

**Patient's credit status**

Current balance: 0.00

Credit limit: 0.00 Available credit: 0.00

**Payment details**

Amount paid by credit: 0.00

Amount paid by patient: 300.00

Total payment: 300

Amount given: 500

Change to give back: 200

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt OK & Next Delete OK

Enter the actual amount given by the patient in the **Cash given** field and press the *Tab* key on the keyboard. mSupply will calculate the change that must be given back to the patient and show it in the **Change required** field.

In this example, the invoice is \$300 and the patient is paying with a \$500 note. mSupply calculates the change to be returned is \$200.

If you have setup other payment types in the preferences (see [16.10. Options \(standard reasons\)](#)) then you can select the type of payment being made in the **Payment type** drop down list.

**Please note:** You cannot overpay a prescription. If you edit the **Amount paid by patient** field to be more than the invoice total you will be shown a message and the **Amount paid by patient** will be reduced back down to the invoice total.

4. Click **OK** to **finalise** the prescription and payment and close the window (if a payment is entered the prescription will be automatically finalised, you have no choice). If the **Print receipt** checkbox is checked then a payment receipt will print at this point.



**Once you click OK, the prescription and payment are finalised and can no longer be edited.** Check carefully before pressing OK!

## Paying with credit

Patients can be given a credit limit (see [10.03. Patients](#)) and can use some or all of that credit at any time to pay off some or all of a prescription. Patient credits (see below) will add to the amount of credit a patient can use. Credit will also be added to a patient when they return goods using a customer credit.

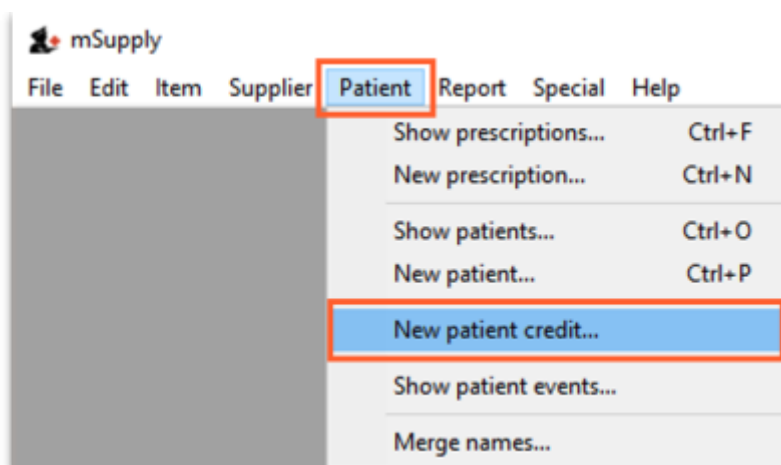
The process of using credit in a payment is exactly the same as the payment process described above. The only difference is that the amount you enter in the **Amount paid by patient** field will be less than the *Total outstanding* field figure:

1. On the prescription, click on the **Payment** tab.
2. Enter the amount to be paid for this invoice today, then press **OK**.

## Patient credits

You can allocate funds in a patient's favour by giving them a **Patient Credit**. You might need to do this if, for example, a patient returns faulty medicines they already paid for. Patient credits will be *subtracted* from future invoices until all credits are used.

1. In the menus, choose **Patient > New patient credit...**:



2. Enter the patient in the **Name** field just as you would for a prescription. You can also enter other details such as a **Reference** (e.g. the prescription number this patient credit is related to) and a **Note** explaining why a patient credit is being issued.

3. Click the **History** button to view the items previously dispensed to this patient:

A screenshot of the 'Patient credit' form in mSupply. The 'Patient details' section includes fields for Name (Sarandi, Artigas), Date of birth (01/02/1986), and Address. The 'Prescription date' is 01/11/2019. The 'History' button is highlighted with a red box. Below the form is a table with columns: Line, Location, Item Name, Quan, Pac, Batch, Exp date, Sell Price, and Price exten. The table is currently empty. At the bottom, there are fields for Item, Amount (0.00), Date, and Notes. The 'OK' button is highlighted with a blue box.

4. Select the item(s) to be returned from the patient's dispensing history, then click **Add to credit**. Multiple items may be added at once:

History for Sarandi, Artigas

Date	Number	Prescriber	Item	Quantity	Directions
01/11/2019	24	CAR	Amoxicillin 250mg tab/cap	1	
01/11/2019	19	CAR	Amoxicillin 500mg tab/cap	1	
01/11/2019	20	CAR	Amoxicillin 500mg tab/cap	1	
01/11/2019	21	CAR	Amoxicillin 500mg tab/cap	1	
01/11/2019	23	CAR	Amoxicillin 500mg tab/cap	1	
01/11/2019	24	CAR	Amoxicillin 500mg tab/cap	2	

**Add to credit** OK

5. Review the patient credit. Note that the price appears as a *negative* value in the patient credit window since it is a credit to the patient, not a charge.

Patient credit

Patient details

Name: Sarandi, Artigas Date of birth: 01/02/1986 Female ☐ Store: General

New Patient Code: 10229487 Address: Entered 01/11/2019

Prescriber: Carretas, Julieta Confirm date: 00/00/00 Invoice 22

Code: CAR Prescription date: 01/11/2019 Entered by user 1 (pass= user1)

Reference: Category: None Note: Patient returning expired item dispensed in error

New line Delete line(s) History

Line	Location	Item Name	Quan	Pac...	Batch	Exp date	Sell Price	Price exten
1		Amoxicillin 500mg tab/cap	1	100	YRT445	31/01/2019	100.00	-100.00

Item: Amount: 0.00

Date Notes

New note Delete note

Subtotal: -100.00  
0 % tax: 0.00  
Total: -100.00

☒ Finalise Export batch: 0 Status: mw ☐ Print receipt OK & Next Delete OK

You can also add items *not* linked to a patient's history by clicking the **New line** button and entering item details just like you would for a prescription.



If you *only* want to allow users to issue patient credits for items linked to a patient's history, turn on the **Limit patient credits to previously prescribed items** preference in the *Invoices 2* tab of **File > Preferences** (see [Invoices 2 Preferences](#)). This will disable the **New line** button, and all items must be selected from the **History** button.

6. Once you are sure the patient credit is correct, check the **Finalise** box and click **OK**.



**Remember you have also just returned items to your mSupply inventory!** If you are going to destroy returned items, you now need to remove them from your mSupply inventory in a separate transaction (either a **Reduce stock Inventory Adjustment** or a **Stocktake**).

When the patient pays for their next prescription, their credit will be *automatically* applied in the Payment window.

In this example, the patient's current prescription is \$300 but they had a \$100 credit which is automatically applied to the invoice. Now, they only need to pay \$200.

The screenshot shows the 'Prescription Entry' window. The 'Patient details' section includes fields for Name (Sarandi, Artigas), Date of birth (01/02/1986), Gender (Female), New Patient Code (10229487), Address, Prescriber (Carretas, Julieta), Confirm date (00/00/00), Prescription date (01/11/2019), and Store (General). The 'Payment' tab is active, showing a message: 'This invoice will be automatically finalised if a payment is entered.' Below this, there are fields for 'Their ref' and 'Note'. To the right, a summary box displays: 'Invoice total: 300.00', 'Total outstanding: 300.00', 'Available credit: 100.00', 'Amount paid by: 200.00', and 'Amount paid by credit: 100.00'. The 'Amount paid by credit' is highlighted with a red box. At the bottom, there are checkboxes for 'Finalise', 'Export batch: 0', 'Status: n/w', and 'Print receipt', along with buttons for 'OK & Next', 'Delete', and 'OK'.

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