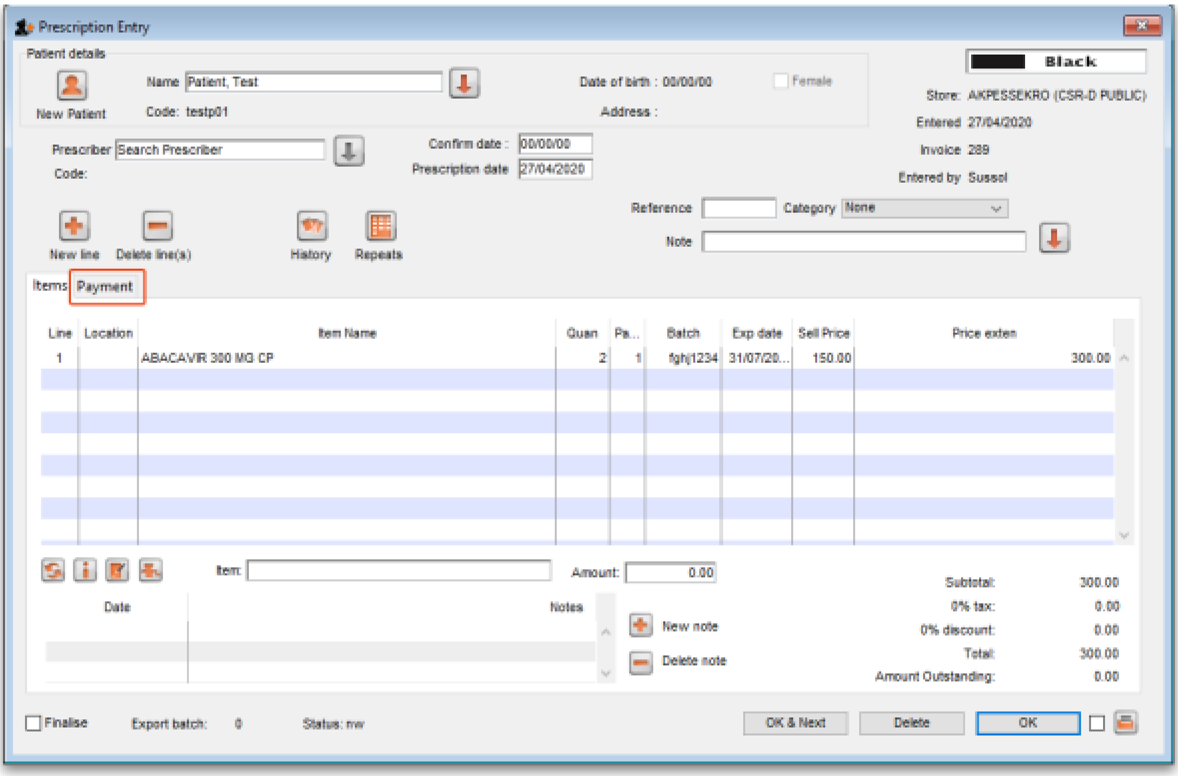
11.03. Prescription payments and credits

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:

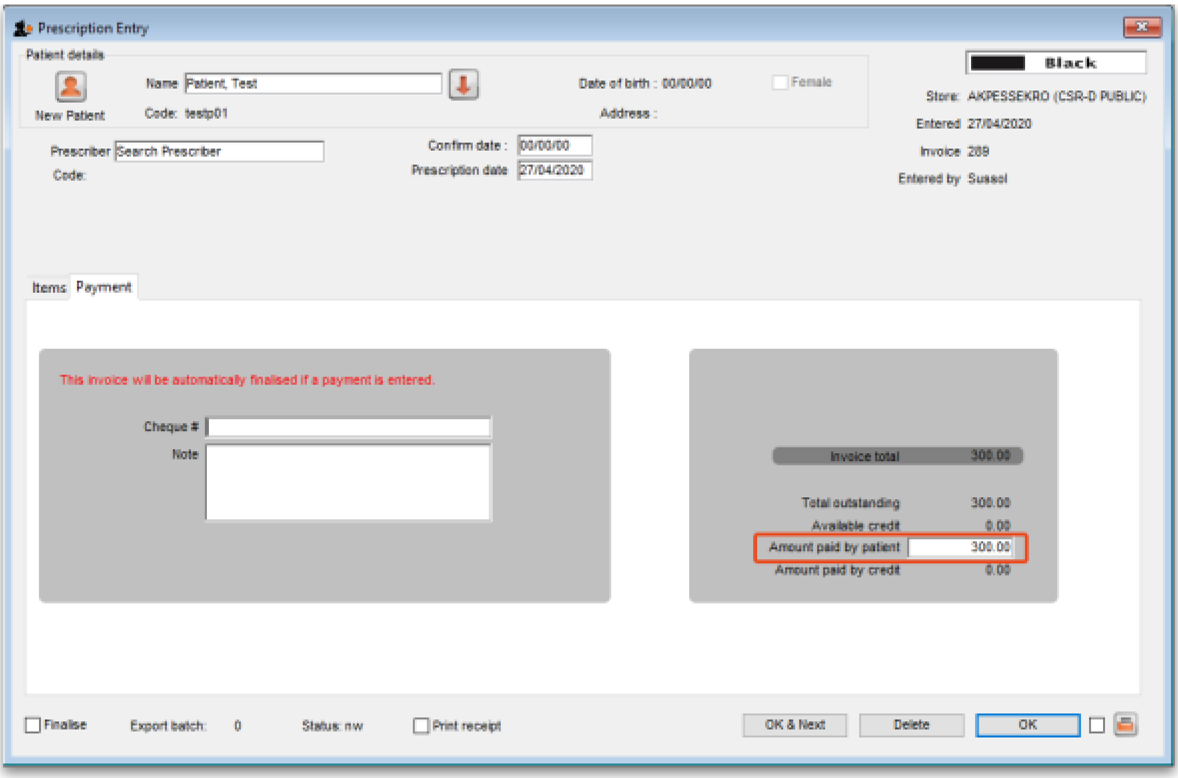


Entering the payment

To enter a payment from the Prescription Entry window:

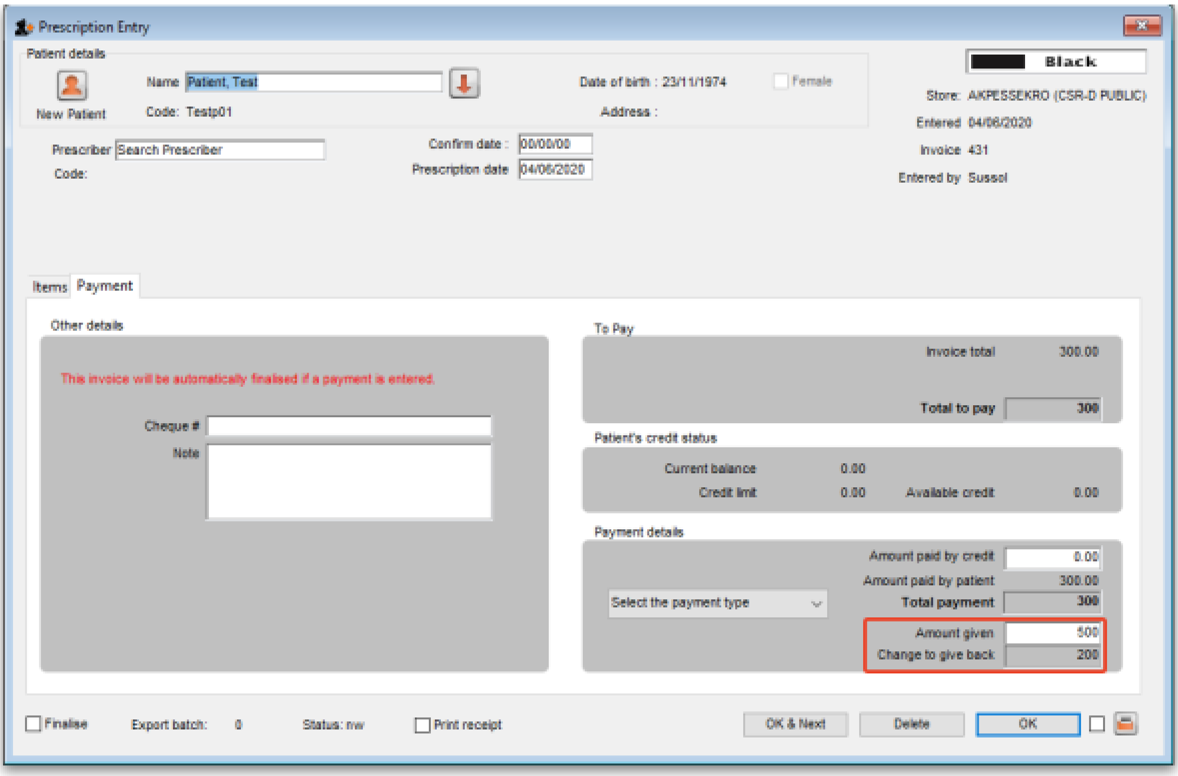
1. Click on the **Payment** tab.

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:



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

3. A confirmation window will open:



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 a 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:

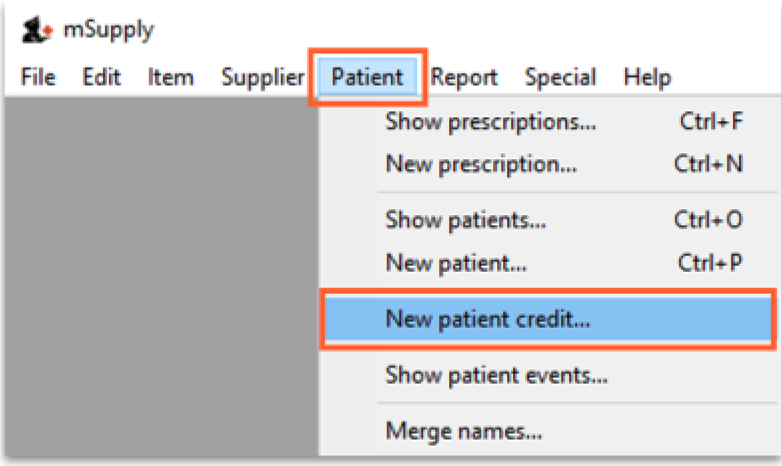
1. On the prescription, click on the **Payment** tab.

2. Enter the amount to be paid for this invoice today, then press **OK**.

Patient credits

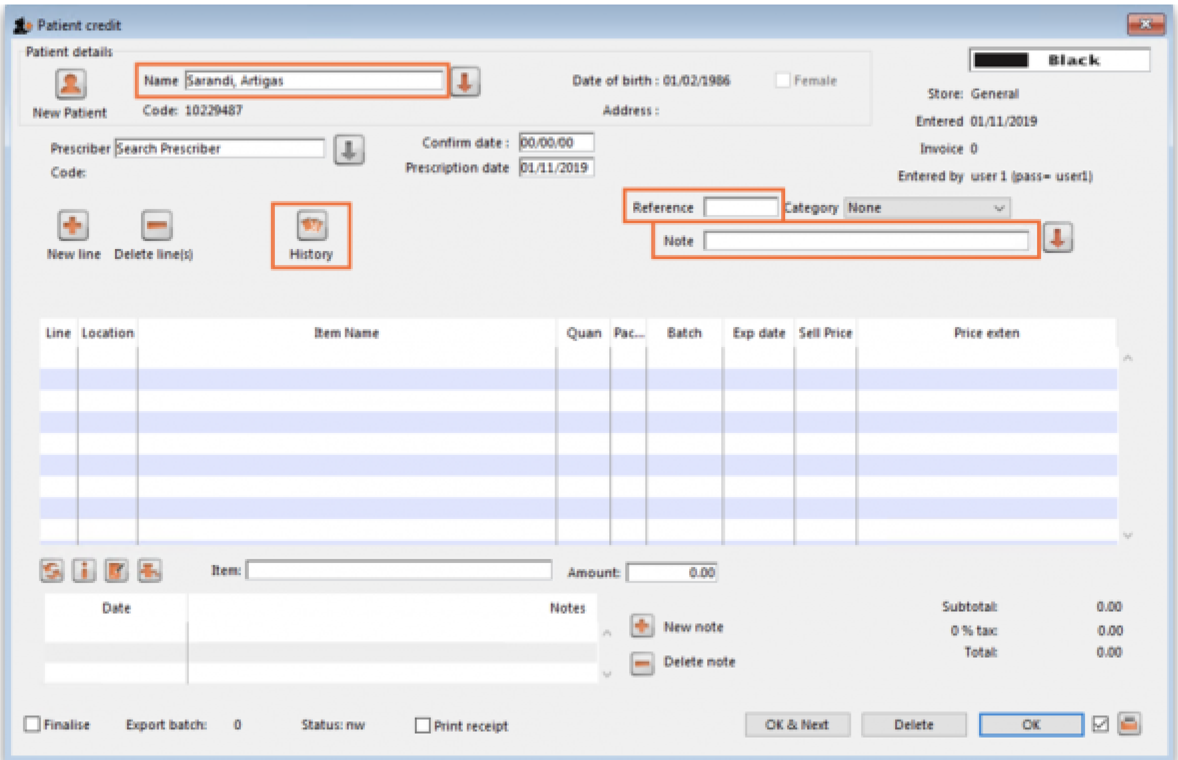
You can allocate funds in a patient's favour by giving them a **Patient Credit**. You might need to do this if, for example, a patient returns faulty medicines they already paid for. Patient credits will be *subtracted* from future invoices until all credits are used.

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

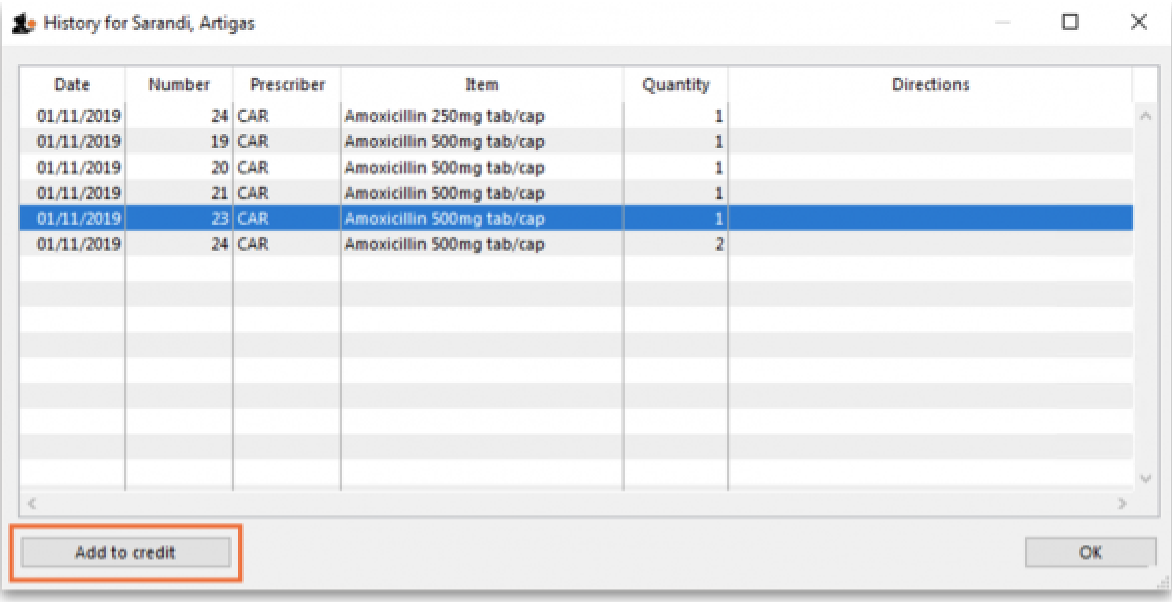


2. Enter the patient in the **Name** field just as you would for a prescription. You can also enter other details such as a **Reference** (e.g. the prescription number this patient credit is related to) and a **Note** explaining why a patient credit is being issued.

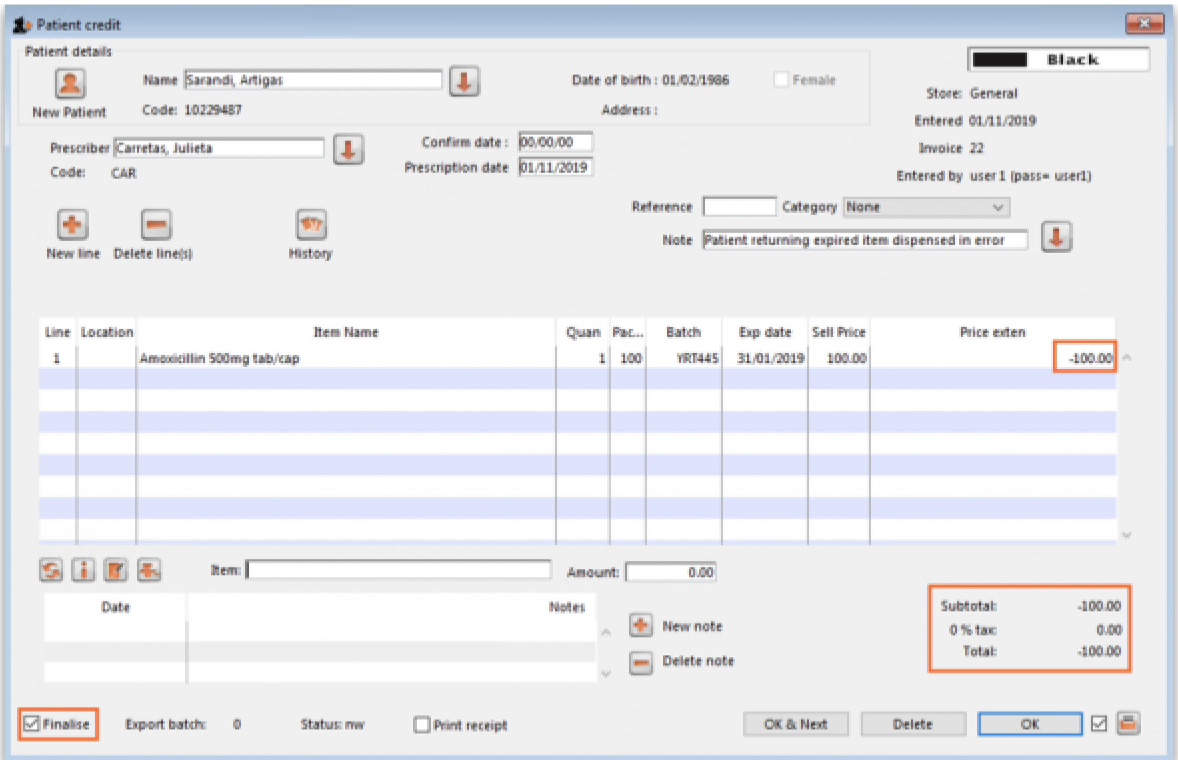
3. Click the **History** button to view the items previously dispensed to this patient:



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:



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.



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.

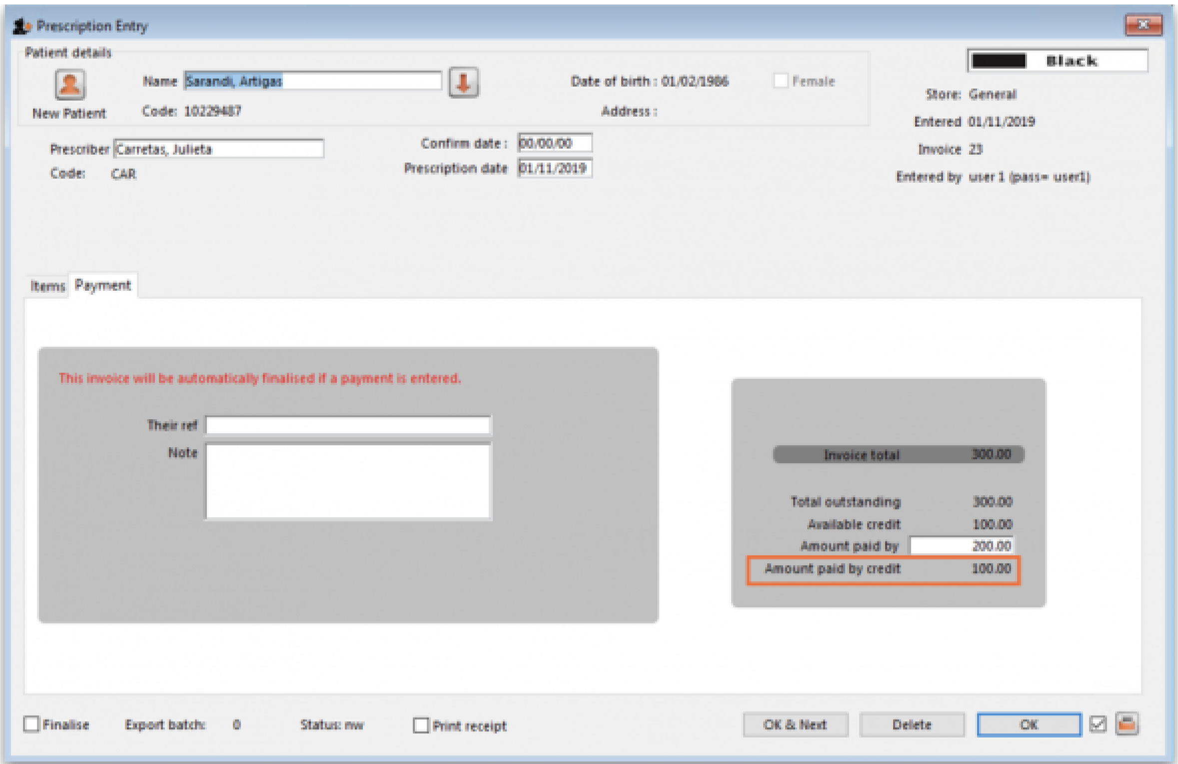
If you *only* want to allow users to issue patient credits for items linked to a patient's history, turn on the **Limit patient credits to previously prescribed items** preference in the *Invoices 2* tab of **File > Preferences** (see Invoices 2 Preferences). This will disable the **New line** button,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



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