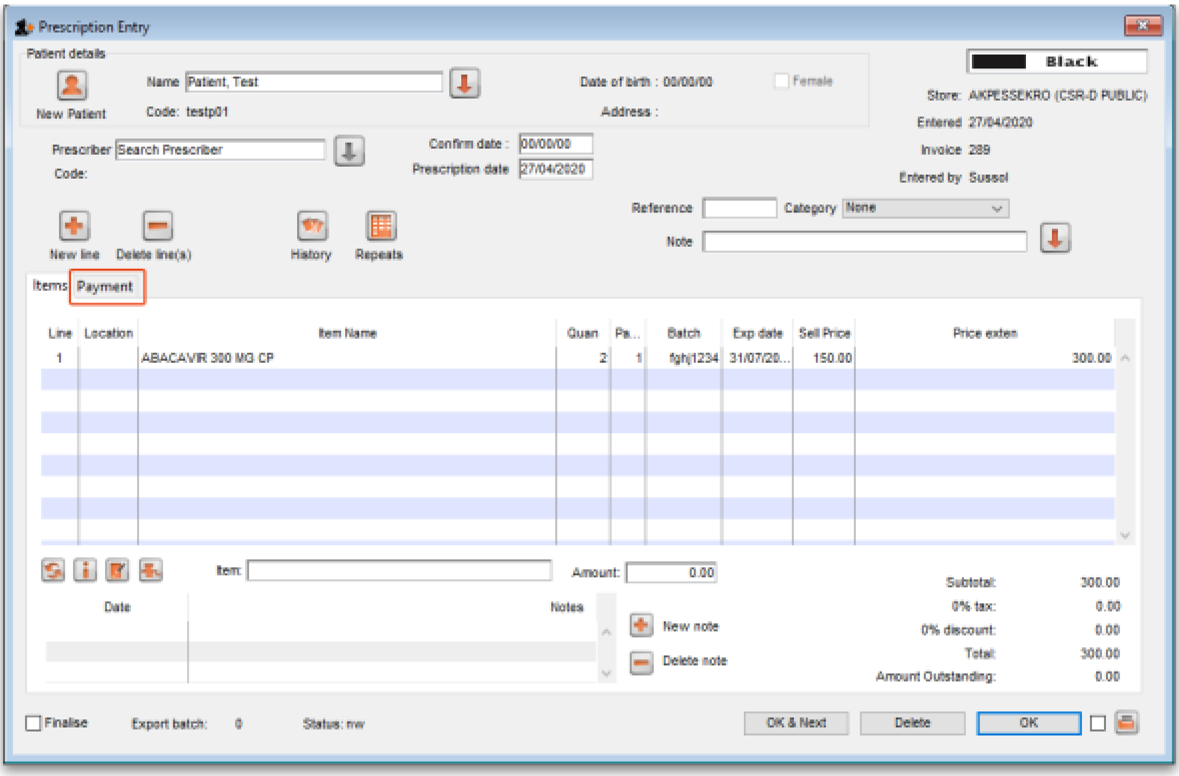
11.03. Prescription payments and credits

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:


Prescription Entry
Patient details
New Patient
Black
New line
Delete line(s)
History
Repeats
Items
Payment
Female
New note
Delete note
OK & Next
Delete
OK

Name: Patient, Test
Code: testp01
Date of birth : 00/00/00
Address :
Store: AKPESSEKRO (CSR-D PUBLIC)
Entered 27/04/2020
Invoice 289
Entered by Sussol
Prescriber: Search Prescriber
Code:
Confirm date : 00/00/00
Prescription date 27/04/2020
Reference
Category: None
Note

Line	Location	Item Name	Quan	Pa...	Batch	Exp date	Sell Price	Price exten
1		ABACAVIR 300 MG CP	2	1	fghj1234	31/07/20...	150.00	300.00

Item:
Amount: 0.00

Subtotal:	300.00
0% tax:	0.00
0% discount:	0.00
Total:	300.00
Amount Outstanding:	0.00

Date
Notes

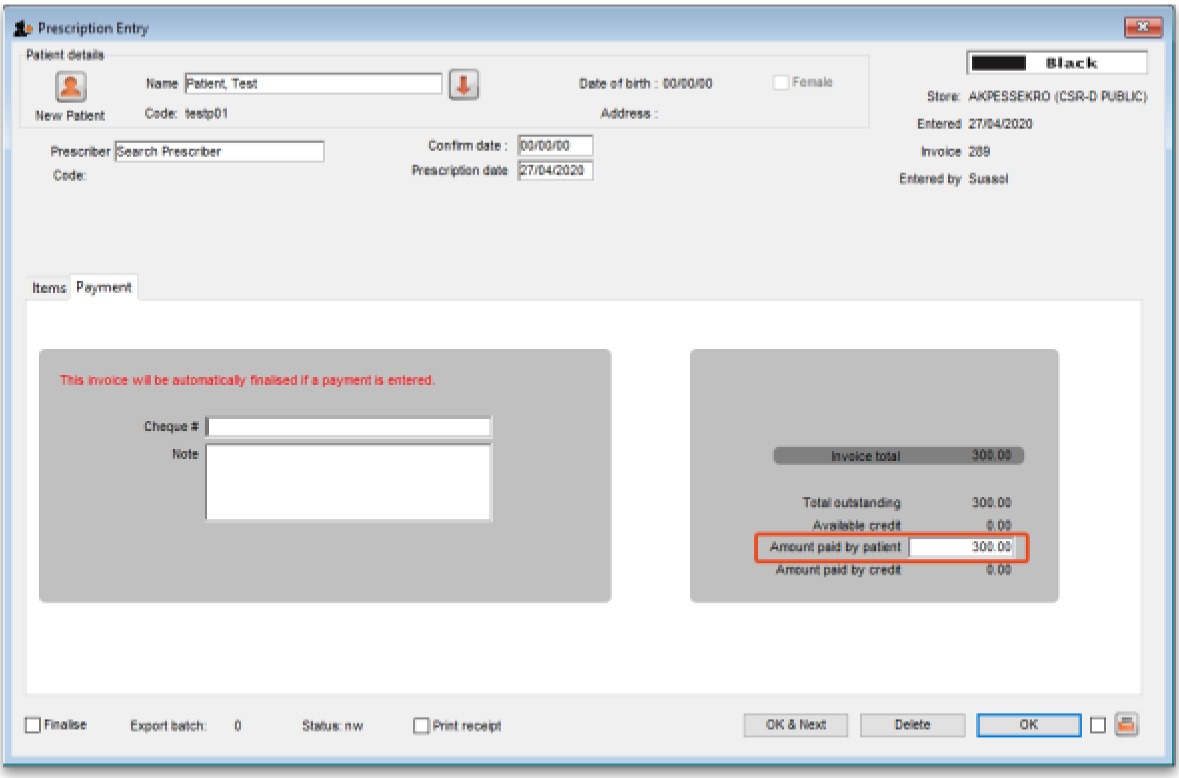
☐ Finalise
Export batch: 0
Status: nw

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

Code: testp01

Date of birth : 00/00/00

Address :

Prescriber Search Prescriber

Code:

Confirm date : 00/00/00

Prescription date 27/04/2020

Black

Store: AKPESSEKRO (CSR-D PUBLIC)

Entered 27/04/2020

Invoice 289

Entered by Sussol

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

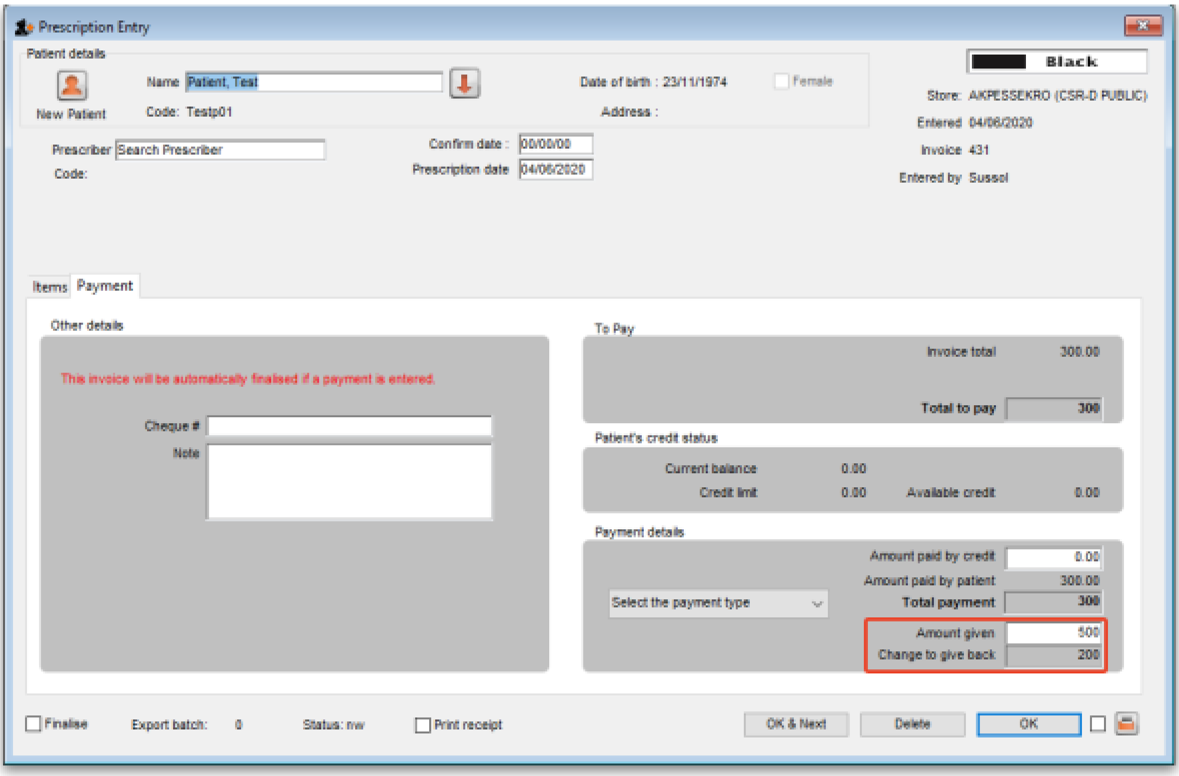
Amount paid by patient 300.00

Amount paid by credit 0.00

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt

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

Code: Testp01

Date of birth : 23/11/1974

Address :

Prescriber Search Prescriber

Code:

Confirm date : 00/00/00

Prescription date 04/06/2020

Black

Store: AKPESSEKRO (CSR-D PUBLIC)

Entered 04/06/2020

Invoice 431

Entered by Sussol

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

Select the payment type

Amount given 500

Change to give back 200

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt

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:

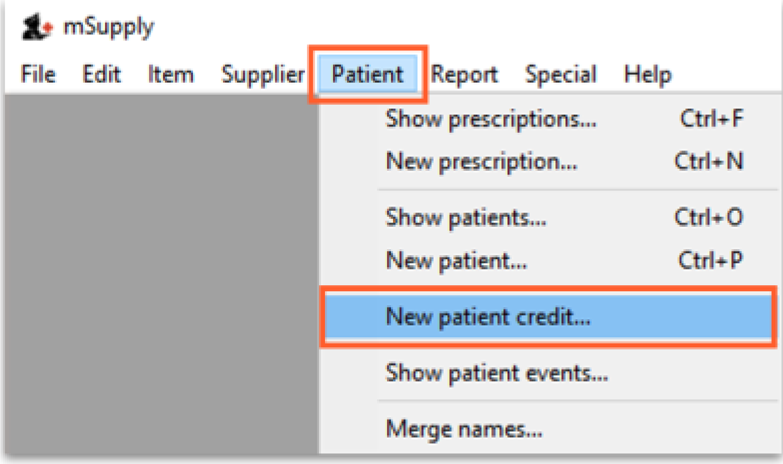
1. On the prescription, click on the **Payment** tab.

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

Patient credits

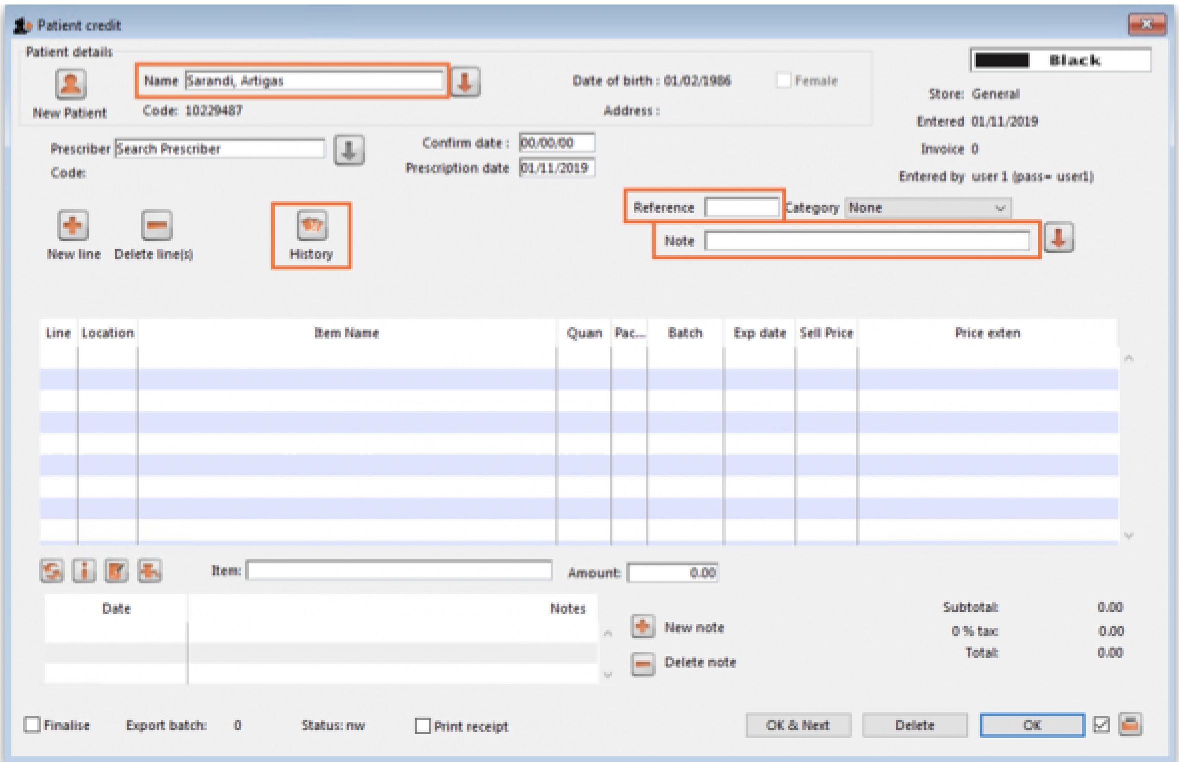
You can allocate funds in a patient's favour by giving them a **Patient Credit**. You might need to do this if, for example, a patient returns faulty medicines they already paid for. Patient credits will be *subtracted* from future invoices until all credits are used.

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


mSupply
File
Edit
Item
Supplier
Patient
Report
Special
Help
Show prescriptions... Ctrl+F
New prescription... Ctrl+N
Show patients... Ctrl+O
New patient... Ctrl+P
New patient credit...
Show patient events...
Merge names...

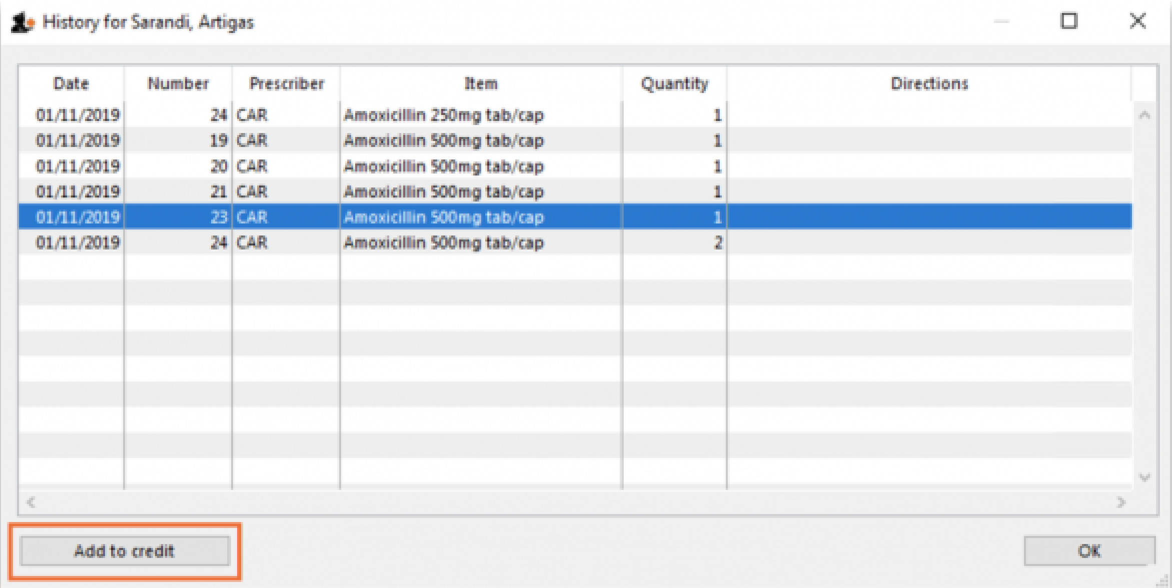
2. Enter the patient in the **Name** field just as you would for a prescription. You can also enter other details such as a **Reference** (e.g. the prescription number this patient credit is related to) and a **Note** explaining why a patient credit is being issued.

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


Name Sarandi, Artigas
Code: 10229487
Date of birth : 01/02/1986
☐ Female
Address :
Store: General
Entered 01/11/2019
Invoice 0
Entered by user 1 (pass= user1)
Prescriber Search Prescriber
Confirm date : 00/00/00
Prescription date 01/11/2019
Category None
Amount: 0.00
Subtotal: 0.00
0 % tax: 0.00
Total: 0.00
☐ Finalise
Export batch: 0
Status: nw
☐ Print receipt

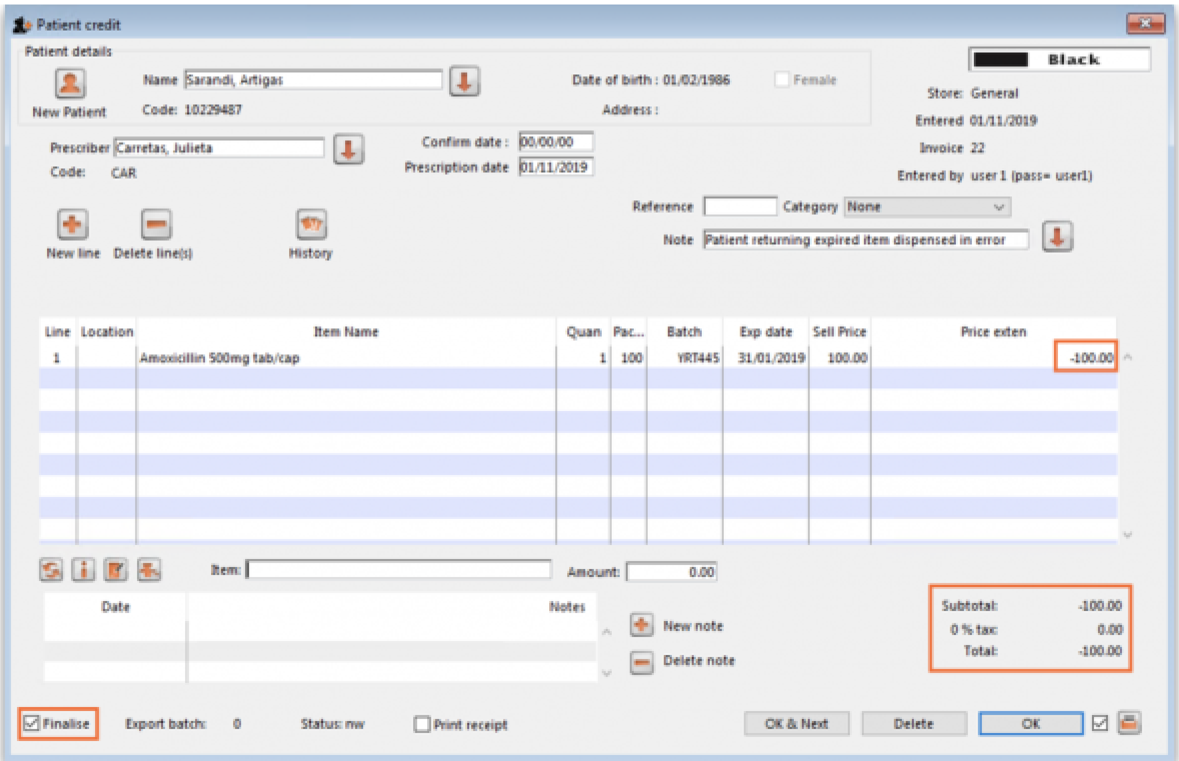
Patient credit
Patient details
Black
New Patient
Code:
New line
Delete line(s)
History
Reference
Note
Line
Location
Item Name
Quan
Pac...
Batch
Exp date
Sell Price
Price exten
Item:
Date
Notes
New note
Delete note
OK & Next
Delete
OK

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:



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	

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.



Name: Sarandi, Artigas
Code: 10229487
Date of birth : 01/02/1986
☐ Female
Address :
Store: General
Entered: 01/11/2019
Invoice: 22
Entered by: user 1 (pass= user1)
Prescriber: Carretas, Julieta
Code: CAR
Confirm date : 00/00/00
Prescription date: 01/11/2019
Reference:
Category: None
Note: Patient returning expired item dispensed in error

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

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

☑ Finalise
Export batch: 0
Status: nw
☐ Print receipt

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.

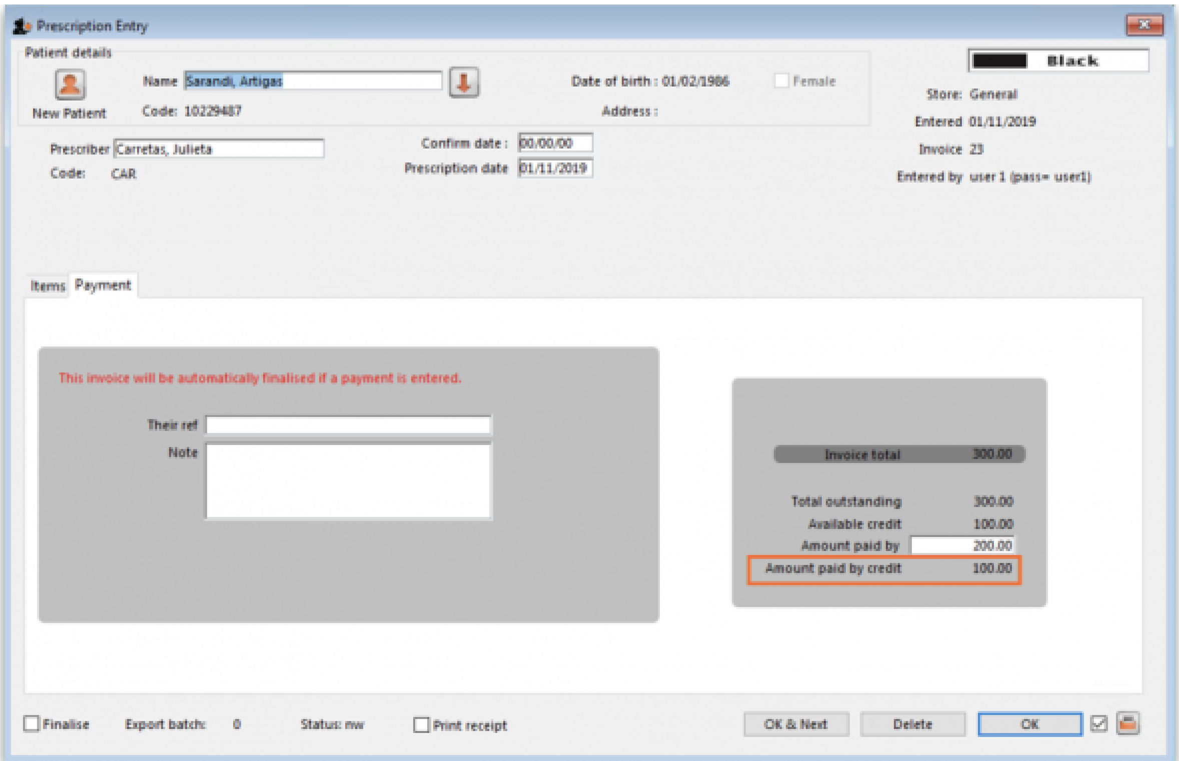
If you *only* want to allow users to issue patient credits for items linked to a patient's history, turn on the **Limit patient credits to previously prescribed items** preference in the *Invoices 2* tab of **File > Preferences** (see Invoices 2 Preferences). This will disable the **New line** button,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



Name: Sarandi, Artigas
Code: 10229487
Date of birth : 01/02/1986
☐ Female
Address :
Store: General
Entered 01/11/2019
Invoice 23
Entered by user 1 (pass= user1)
Prescriber: Carretas, Julieta
Code: CAR
Confirm date : 00/00/00
Prescription date: 01/11/2019

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

Their ref
Note

Invoice total	300.00
Total outstanding	300.00
Available credit	100.00
Amount paid by	200.00
Amount paid by credit	100.00

☐ Finalise
Export batch: 0
Status: nw
☐ Print receipt

Previous: ***11.02. Receiving payment from customers*** | | Next: ***11.04. Cash register***

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Last update: **2020/05/18 13:49**