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:

New Patient Prescriber S Code:	Name Patient, Test Code: testp01 earch Prescriber	History Repeats	Confirm date : Prescription date	Date //	e of birth Address Ref	erence		Female ategory Net	Store: AKPESSE Entered 27/64/202 Invaice 289 Entered by Sussel	Black KRO (CSR-D PUBL D
Line Locatio	n ABACAVIR 300 MG CP	ten Name		Quan 2	Pa	Batch fghj1234	Exp date 31/07/20	Sell Price 150.00	Price exten	300.00
S i F	tent			Amou	nt [0.00 New note Delete not			Subtotal: 0% tax: 0% discount: Total: Amount Outstanding:	300.00 0.00 0.00 300.00 0.00

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:

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atient details						Bla	ck
2	Name Patient, Test	1	Date of birth : 00/00/00	Female	Store	AKRESSEKRO (CS	R-D PUBLI
New Patient	Code: testp01	_	Address :		Entered	27/04/2020	
Prescriber 5	earch Prescriber	Confirm date :	00/00/00		Invoice	289	
Code:		Prescription date	27/04/2020		Entered by	Sussol	
Items Paymen	N.						
This invoice	e will be automatically finalised if	a payment is entered.					
This involce	e will be automatically finalised if Cheque # Note	a payment is entered.		Invoice to	nai	305.05	
This involce	e will be automatically finalised if Cheque # Note	a payment is entered.		Invoice to	tal	305.05	
This involce	e will be automatically finalised if Cheque # Note	a payment is entered.		Invoice to Total outstand Available cri	ital ing edit	308.00 308.00 0.00	
This invoice	e will be automatically finalised if Cheque # Note	a payment is entered.		Inveice to Total outstand Available on Amount paid by pair	ing edit	305.00 300.00 0.00 300.00	
This invoice	e will be automatically finalised if Cheque # Note	a payment is entered.		Invoice to Total outstand Available cri Amount paid by pair Amount paid by cri	nai ing edit edit	300.00 300.00 0.00 300.00	
This invoice	e will be automatically finalised if Cheque # Note	a payment is entered.		Total outstand Available cm Anount paid by pain Amount paid by cm	stal ing edit ent edit	300.00 0.00 0.00 0.00	
This invoice	e will be automatically finalised if Cheque # Note	a payment is entered.		Total outstand Available cre Ameunt paid by pati Ameunt paid by cre	tai ing edit ent edit	300.00 0.00 0.00 0.00	
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This involce	e will be automatically finalised if Cheque # Note	'a payment is entered.		Invoice to Total outstand Available cre Amount paid by pati Amount paid by cre	ing ing idt ent sdt	300.00 0.00 0.00 0.00	
This involce	e will be automatically finalised if Cheque # Note	'a payment is entered.		Invoice to Total outstand Available cri Amount paid by pati Amount paid by cri	ing edit ent dit	300.00 300.00 0.00 300.00 0.00	

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

3. A confirmation window will open:

tient details	Name Datest Test		Date	A high - 23/11/1974	Famile				Black
👗	Code: Testa01	•	-	Miness :			Store: Al	RPESSEKRO	0 (CSR-D PUB
ew Patent		Caster data : D	1000000				Entered 04	106/2020	
Prescriber S	earch Prescriber	Prescription date	14/06/2020				Invoice 43	11	
CODE.							Entered by Su	1550	
ems Paymen	t								
-				0					
Uther details			10	PRV					
Other details				ray			Invoice to	tal	300.00
This invoice	will be automatically finalised if a	payment is entered.		ray			Invoice to	tal	300.00
This invoice	will be automatically finalised if a	payment is entered.	10	ray.			Invoice to Total to p	tal ay	300.00
This invoice	will be automatically finalised if a	payment is entered.	Pat	ient's credit status			Invoice to Total to p	tal ay	300.00 300
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance		0.00	Invoice to	tal ay	300.00 300
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit		0.00	Invoice to Total to p Available cre	tai ay dit	300.00 300
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details		0.00 0.00	Involce to Total to p Available cre	tai ay dit	300.00 300 0.00
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details		0.00 0.00 0.00	Invoice to Total to p Available cre	tal ay dit dit	300.00 300 0.00 0.00
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details		0.00 0.00 Arr Arr	Invoice to Total to p Available cre nount paid by cre pount paid by patie	dit	300.00 300 0.00 0.00 300.00
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details Select the payment type	×	0.00 0.00 Arr Arr	Invoice to Total to p Available cre nount paid by cre punt paid by patie Total payme	dit	300.00 300 0.00 0.00 300.00 300
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details Select the payment type	×	0.00 0.00 Arr Arre	Invoice to Total to p Available cre nount paid by cre ount paid by patie Total payme Amount giv	dit dit dit ent en	300.00 300 0.00 300.00 300 500
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details Select the payment type	¥	0.00 0.00 Arr Arrc	Invoice to Total to p Available cre nount paid by cre ount paid by patie Total payme Amount giv hange to give ba	dit dit dit ent en ck	300.00 300 0.00 300,00 300 500 200
This invoice	will be automatically finalised if a Cheque # Note	payment is entered.	Pat	ent's credit status Current balance Credit limit ment details Select the payment type	×	0.00 0.00 Arr Arrc C	Invoice to Total to p Available cre nount paid by cre ount paid by patie Total payme Amount giv hange to give ba	dit dit dit en ck	300.00 300 0.00 300.00 300 300 200

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.



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 patient credit (see below).

The process of using credit in a payment is exactly the same as a the payment process described above. The only difference is that, if the patient has some credit available, mSupply will automatically use as much as it can to pay for the patient's prescription. You can see the amount of credit the patient has available (made up of their credit limit and patient credits applied to them) in the **Available credit** field and the amount of credit used to pay for the prescription in the **Amount paid by credit** field: Last update: 2020/05/18 payments_and_receipts:prescription_payments https://docs.msupply.org.nz/payments_and_receipts:prescription_payments?rev=1589811580 14:19

New Patient	Name Patient, Test Code: pattest		Date of birth : 04/11/1963 Address :	Female	Store: AKPESSEKRO (CSR-D PUBL) Entered 18/05/2020
Prescriber S Code:	earch Prescriber	Confirm date : Prescription date	00/00/00 18/05/2020 Patient type Inpatient	•	Invoice 442 Entered by Sussol
			Items Payment		
This invatio	a will be automatically finalized if	a comment is entered			
	Cheque #	a payment is entered.		Select Insurance Invoice	total S8.00
	Cheque #			Select Insurance Payable by insur Total outstar Available of Amount paid by pu Amount paid by pu	total 58.00 rance 0.00 ndling 58.00 credit 100.00 atient 0.00 credit 58.00
	Cheque #			Select Insurance Invoice Payable by insu Total outstar Available of Amount paid by or Amount paid by or	total 58.00 rance 0.00 nding 58.00 credit 100.00 atient 0.00 credit 58.00

- 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.	nSupp	ly						
File	Edit	ltem	Supplier	Patie	ent	Report	Special	Help
					Sho	w prescr	iptions	Ctrl+F
					Nev	v prescri	ption	Ctrl+N
					Sho	w patien	ts	Ctrl+O
					Nev	v patient		Ctrl+P
					Nev	v patient	credit	
					Sho	w patien	t events	
					Me	rge name	25	

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**

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explaining why a patient credit is being issued.

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

New Patient Code:	Sarandi, Artigas 10229487	Ŧ	Date	of birth	: 01/02/19	16	Female	Store: General Entered 01/11/2019	Black
Prescriber Search Pre Code:	(s) History	Confirm date : Prescription date	00,00,00	Ret	erence Note	-	ategory Non	Invoice 0 Entered by user 1 (pass- e V	user1)
Line Location	Rem Name		Quan	Pac	Batch	Exp date	Sell Price	Price exten	
S i F &	Rem:		Amour	*	0.00 New note Delete no	e ote		Subtotal: 0 % tax: Total:	0.00 0.00 0.00

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	
1/11/2019	24	CAR	Amoxicillin 250mg tab/cap	1		
1/11/2019	19	CAR	Amoxicillin 500mg tab/cap	1		
1/11/2019	20	CAR	Amoxicillin 500mg tab/cap	1		
1/11/2019	21	CAR	Amoxicillin 500mg tab/cap	1		
1/11/2019	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.

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lew Patient	Name Sarandi, Arti Code: 10229487	igas	Ŧ	Date	of birth	: 01/02/1984 :	5 Pe	male	Store: General Entered 01/11/20	Black
Prescriber	Carretas, Julieta CAR	Ţ	Confirm date : 00 Prescription date 01	/00/00					Invoice 22 Entered by user 1 (p	ass= user1)
-	-	-			Ref	erence	Cate	gory None	~	
New line	Delete line(s)	History				Note Pat	ient returning	expired iter	n dispensed in error	1
Line Locati	Amoxicillin 500mg to	Item Name ab/cap		Quan 1	Pac 100	Batch YRT445	Exp date 31/01/2019	Sell Price 100.00	Price exter	-100.00 ^
3	R I Rem [Anou	*	0.00				v
	ite			Notes		New note			Subtotal: 0 % tax:	-100.00

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.

				Black	_
Name Sarandi, Artigas	1	Date of birth : 01/02/1986	Female	Gara Garanti	
New Patient Code: 10229487		Address :		Store: General	
Prescriber Carretas Julieta	Confirm date :	00/00/00		Invoice 23	
Code: CAR	Prescription date	01/11/2019		Entered by user 1 (passe user1)	
				Entered by over a grass- useraj	
tems Payment					
Note			Invoice to	tal 300.00	
Note			Invoice to	tal 300.00	
Note			Invoice to Total outstand Available cre	tal 300.00 ng 300.00 dit 100.00	
Note			Invoice to Total outstand Available cre Amount paid	tal 300.00 ng 300.00 dit 100.00 by 200.00	
Note			Invoice to Total outstand Available cre Amount paid Amount paid by cre	tal 300.00 ng 300.00 dit 100.00 by 200.00 dit 100.00	
Note			Invoice to Total outstand Available cre Amount paid Amount paid by cre	tal 300.00 ng 300.00 dit 100.00 by 200.00 dit 100.00	
Note			Invoice to Total outstand Available cre Amount paid Amount paid by cre	tal 300.00 ng 300.00 dit 100.00 by 200.00 dit 100.00	
Note			Invoice to Total outstand Available cre Amount paid Amount paid by cre	tai 300.00 ng 300.00 dit 100.00 by 200.00 dit 100.00	
Note			Invoice to Total outstand Available cre Amount paid Amount paid by cre	tai 300.00 ng 300.00 dit 100.00 by 200.00 dit 100.00	

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