

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 with the 'Payment' tab selected. The window contains the following fields and sections:

- Patient details:** Name: Patient, Test; Date of birth: 00/00/00; Female: ; Store: AKPESSEKRO (CSR-D PUBUC); Entered: 27/04/2020; Invoice: 289; Entered by: Sussol.
- Prescriber:** Search Prescriber; Code: testp01; Confirm date: 00/00/00; Prescription date: 27/04/2020.
- Reference:** Reference: ; Category: None; Note: ;
- Buttons:** New line, Delete line(s), History, Repeats.
- Items:** A table with columns: Line, Location, Item Name, Quan, Pa..., Batch, Exp date, Sell Price, Price exten. The first row is: 1, , ABACAVIR 300 MG CP, 2, 1, fghj1234, 31/07/20..., 150.00, 300.00.
- Item entry:** Item: ; Amount: 0.00.
- Notes:** New note, Delete note.
- Summary:** Subtotal: 300.00; 0% tax: 0.00; 0% discount: 0.00; Total: 300.00; Amount Outstanding: 0.00.
- Footer:** Finalise; Export batch: 0; Status: nw; OK & Next, Delete, OK.

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:

The screenshot shows the 'Prescription Entry' window. At the top, there are 'Patient details' including Name (Patient, Test), Date of birth (00/00/00), and Gender (Female). Below this, there are fields for 'New Patient' (Code: testp01), 'Prescriber' (Search Prescriber), 'Confirm date' (00/00/00), and 'Prescription date' (27/04/2020). On the right side, there is a dropdown for 'Black', 'Store: AKPESSEKRO (CSR-D PUBLIC)', 'Entered: 27/04/2020', 'Invoice: 289', and 'Entered by: Sussal'. The 'Items' tab is selected, showing a 'Payment' section. A red message states: 'This invoice will be automatically finalised if a payment is entered.' Below this, there are fields for 'Cheque #' and 'Note'. To the right, a summary table shows: 'Invoice total: 300.00', 'Total outstanding: 300.00', 'Available credit: 0.00', 'Amount paid by patient: 300.00' (highlighted with a red box), and 'Amount paid by credit: 0.00'. At the bottom, there are buttons for 'Finalise', 'Export batch: 0', 'Status: nw', 'Print receipt', 'OK & Next', 'Delete', and '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:

The screenshot shows the 'Prescription Entry' window with updated patient details: Name (Patient, Test), Date of birth (23/11/1974), and Gender (Female). The 'New Patient' code is 'Testp01'. The 'Prescription date' is now '04/06/2020'. The 'Store' is 'AKPESSEKRO (CSR-D PUBLIC)', 'Entered' is '04/06/2020', and 'Invoice' is '431'. The 'Items' tab is still selected, but the 'Payment' section now includes 'Other details' (with the same red message and 'Cheque #'/'Note' fields), 'To Pay' (showing 'Invoice total: 300.00' and 'Total to pay: 300'), 'Patient's credit status' (Current balance: 0.00, Credit limit: 0.00, Available credit: 0.00), and 'Payment details' (Amount paid by credit: 0.00, Amount paid by patient: 300.00, Total payment: 300). The 'Amount given' field is set to '500' and the 'Change to give back' field is set to '200', both highlighted with a red box. At the bottom, the 'OK' button is highlighted.

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 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:

The screenshot shows the 'Prescription Entry' form. At the top, there are patient details: Name 'Patient, Test', Date of birth '04/11/1963', and Gender 'Female'. The patient code is 'pattest'. The prescription date is '18/05/2020' and the patient type is 'Inpatient'. The store is 'AKPESSEKRO (CSR-D PUBLIC)' and the invoice number is '442'. The form is currently in the 'Payment' tab. A message states: 'This invoice will be automatically finalised if a payment is entered.' Below this, there are fields for 'Cheque #' and 'Note'. To the right, there is a 'Select Insurance' dropdown and a summary table:

Invoice total	58.00
Payable by insurance	0.00
Total outstanding	58.00
Available credit	100.00
Amount paid by patient	0.00
Amount paid by credit	58.00

At the bottom of the form, there are buttons for 'Finalise', 'Export batch: 0', 'Status: nw', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

In this example, the patient has 100 credit available (made up of their credit limit only, which is 100) and all 58 of their prescription charge has been paid with the credit.

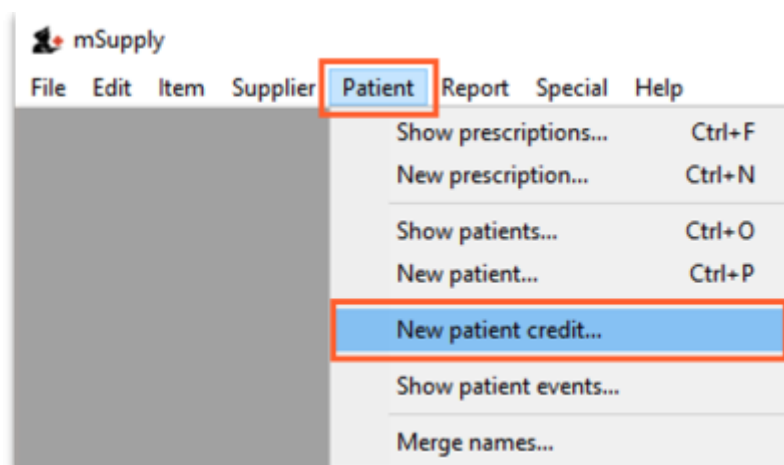
If you or the patient does not wish to use their credit, or wishes to reduce the amount of their credit used to pay the prescription, simply change the amount actually paid by the patient in the **Amount paid by patient** field and press the *Tab* key on the keyboard so that mSupply re-calculates the amount paid by credit. Here is a screenshot if the patient in the example above decides to pay 10 towards their prescription and only use 48 of their credit:

If the **Amount paid by patient** field is not zero when you click on the **OK** button, the change calculation window appears as normal. If **Amount paid by patient** field is zero when you click on the **OK** button, the prescription is simply closed as there is nothing more to be done - the prescription cost is taken off the patient's available credit as appropriate.

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.

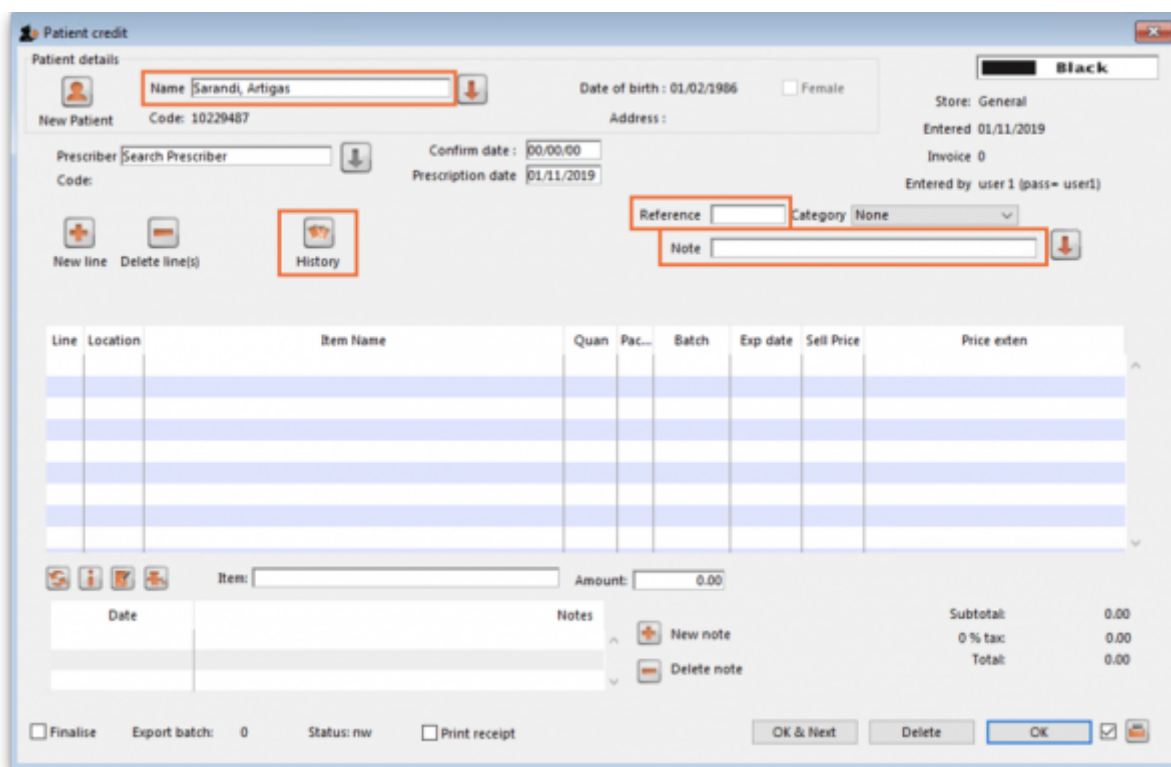
1. In the menus, choose **Patient > New patient credit...**:



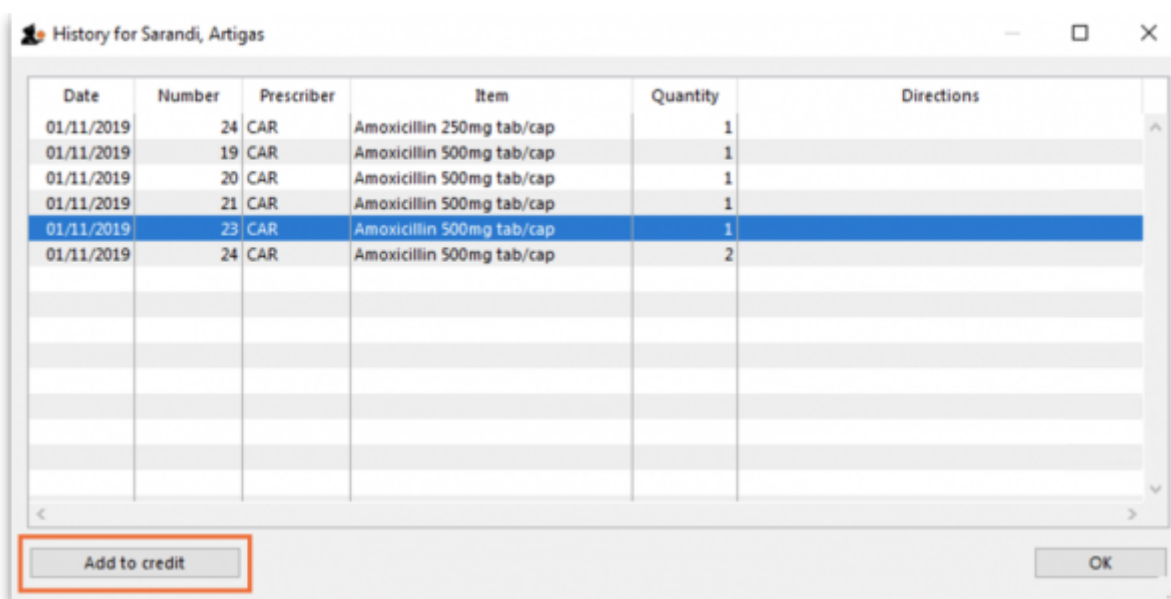
2. Enter the patient in the **Name** field just as you would for a prescription. You can also enter other details such as a **Reference** (e.g. the prescription number this patient credit is related to) and a **Note**

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.

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

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

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

Finalise | Export batch: 0 | Status: nrw | 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. At the top, it displays 'Patient details' for 'Sarandi, Artigas' with a date of birth of 01/02/1986. Below this, it shows 'New Patient' code 10229487 and 'Prescriber' 'Carretas, Julieta'. A 'Payment' tab is active, showing a message: 'This invoice will be automatically finalised if a payment is entered.' To the right, a summary table is displayed:

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

At the bottom of the window, there are buttons for 'Finalise', 'Export batch: 0', 'Status: nw', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

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