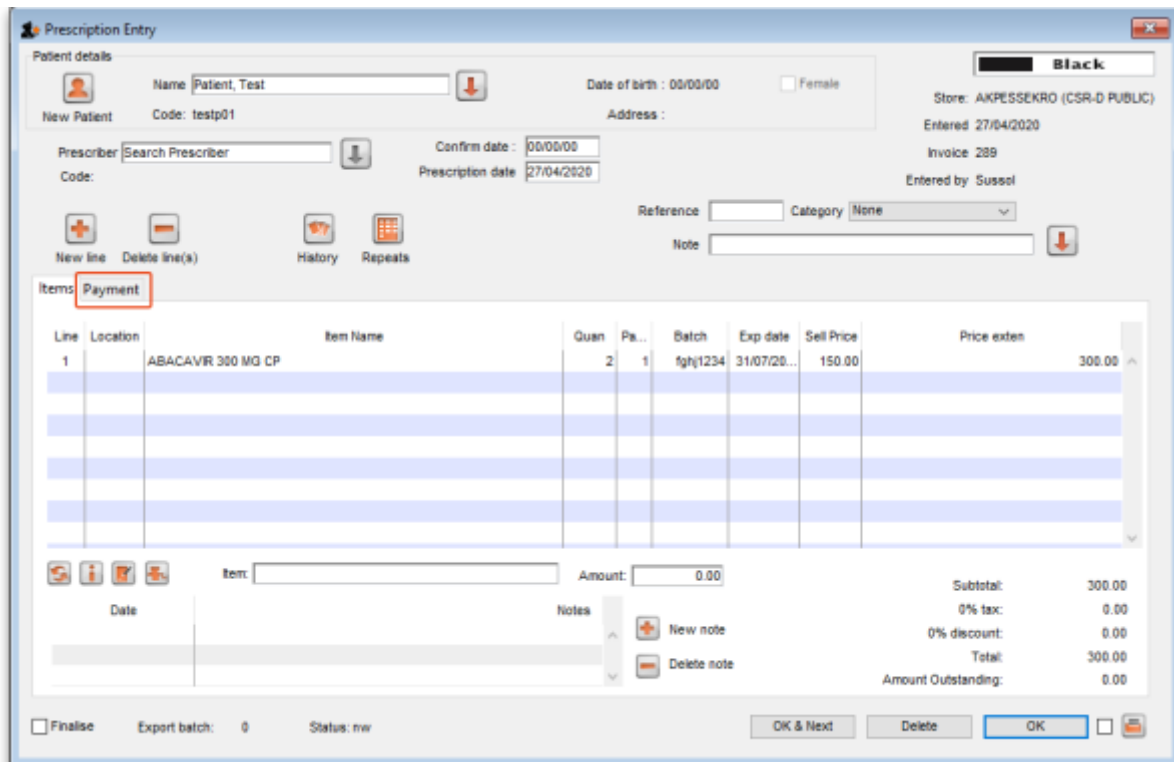


11.03. Prescription payments and credits

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; Gender: 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: [Text field]
- 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.
- Summary:** Subtotal: 300.00; 0% tax: 0.00; 0% discount: 0.00; Total: 300.00; Amount Outstanding: 0.00.
- Buttons:** New line, Delete line(s), History, Repeats, New note, Delete note, 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. The 'Patient details' section includes Name: Patient, Test; Date of birth: 00/00/00; Gender: Female; Store: AKPESSEKRO (CSR-D PUBLIC); Entered: 27/04/2020; Invoice: 289; Entered by: Sussal. The 'Items' section is set to 'Payment'. 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, 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); 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 details. Patient details: Name: Patient, Test; Date of birth: 23/11/1974; Gender: Female; Store: AKPESSEKRO (CSR-D PUBLIC); Entered: 04/06/2020; Invoice: 431; Entered by: Sussal. The 'Items' section is 'Payment'. 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, a summary table shows: Invoice total: 300.00; Total to pay: 300.00. Under 'Patient's credit status', it shows: Current balance: 0.00; Credit limit: 0.00; Available credit: 0.00. Under 'Payment details', it shows: Amount paid by credit: 0.00; Amount paid by patient: 300.00; Total payment: 300.00; Amount given: 500.00 (highlighted with a red box); Change to give back: 200.00 (highlighted with a red box). At the bottom, there are buttons for 'Finalise', 'Export batch: 0', 'Status: nw', 'Print receipt', 'OK & Next', 'Delete', and '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) and cash paid into the cash register by a patient will add to the amount of credit a patient can use.

The process of using credit in a payment is exactly the same as 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, patient credits and cash they have paid in) 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 tabs for 'Items' and 'Payment', with 'Payment' selected. Below the tabs, there are two main panels. The left panel contains a red warning message: 'This invoice will be automatically finalised if a payment is entered.' Below this, there are fields for 'Cheque #' and 'Note'. The right panel contains a 'Select Insurance' dropdown menu and a summary table. The summary table is as follows:

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 several buttons: 'Finalise', 'Export batch: 0', 'Status: nw', 'Print receipt', 'OK & Next', 'Delete', and 'OK'. The 'OK' button is highlighted in blue.

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:

The screenshot shows the 'Prescription Entry' window. The 'Patient details' section includes fields for Name (Patient_Test), Date of birth (23/11/1974), Gender (Female), Store (AKPESSEKRO (CSR-D PUBLIC)), Entered (04/06/2020), Invoice (431), and Entered by (Susael). The 'Payment' section is active, showing 'To Pay' details: Invoice total 300.00, Total to pay 300.00. The 'Patient's credit status' is highlighted with a red box, showing Current balance 100.00, Credit limit 100.00, and Available credit 100.00. The 'Payment details' section is also highlighted with a red box, showing Amount paid by credit 100.00, Amount paid by patient 200.00, Total payment 300.00, Amount given 0, and Change to give back. The 'Other details' section has a red message: 'This invoice will be automatically finalised if a payment is entered.' and fields for Cheque # and Note. At the bottom, there are buttons for 'Finalise', 'Export batch: 0', 'Status: on', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

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. Creating a patient credit increases the amount of credit a patient has. Patient credit can be used to pay for future prescriptions.

View patient credits

To view already created patient credits, choose **Patient > Show prescriptions** in the menus or click on the show prescriptions icon on the Patients tab of the Navigator:



In the filter window that appears, select the appropriate filter options and click on the **Find** button to show the prescriptions that match the filters (just click on the **Find** button without changing anything if you want to see the default 15 most recent prescriptions):

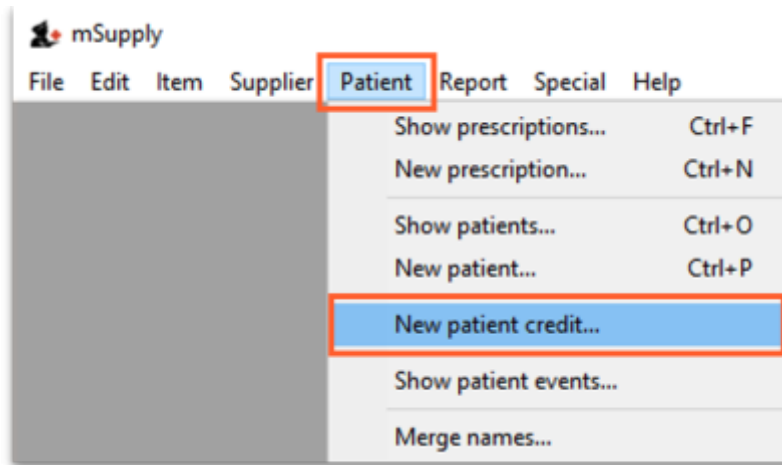
Types	Store name	Name	Type	St...	Entered	Confirmed	Invnum	Total	Their ref	Picking pri...	Commc
Patient prescriptions		Général, Patient	cc	cn	21/05/2020	21/05/2020	443	-441			
Supplier invoices		Patient, Test	ci	fn	18/05/2020	18/05/2020	442	58			
Inventory adjustments		Général, Patient	ci	fn	07/05/2020	07/05/2020	437	29			
Supplier credits		Général, Patient	ci	fn	07/05/2020	07/05/2020	436	29		07/05/2020	
Customer credits		Général, Patient	ci	fn	02/05/2020	02/05/2020	435	58			Offset for a...tr:
Buils		DISTRIC...OUKRO	ci	fn	01/05/2020	01/05/2020	433	20000			Offset for a...tr:
Repacks		Général, Patient	ci	fn	01/05/2020	01/05/2020	432	58		01/05/2020	
Find...		Général, Patient	ci	fn	01/05/2020	01/05/2020	431	87			
By date		DISTRIC...OUKRO	cc	fn	01/05/2020	01/05/2020	430	0			
By status		DISTRIC...OUKRO	cc	fn	01/05/2020	01/05/2020	429	-20000			Offset for a...tr:
My transactions		Général, Patient	cc	fn	01/05/2020	01/05/2020	427	-100			Offset for a...tr:

Patient credits have cc (for "customer credit") in the *Type* column, prescriptions have a type of *ci*. If you only wish to see patient credits then click on the **Customer credits** item on the left hand side.

Create patient credits

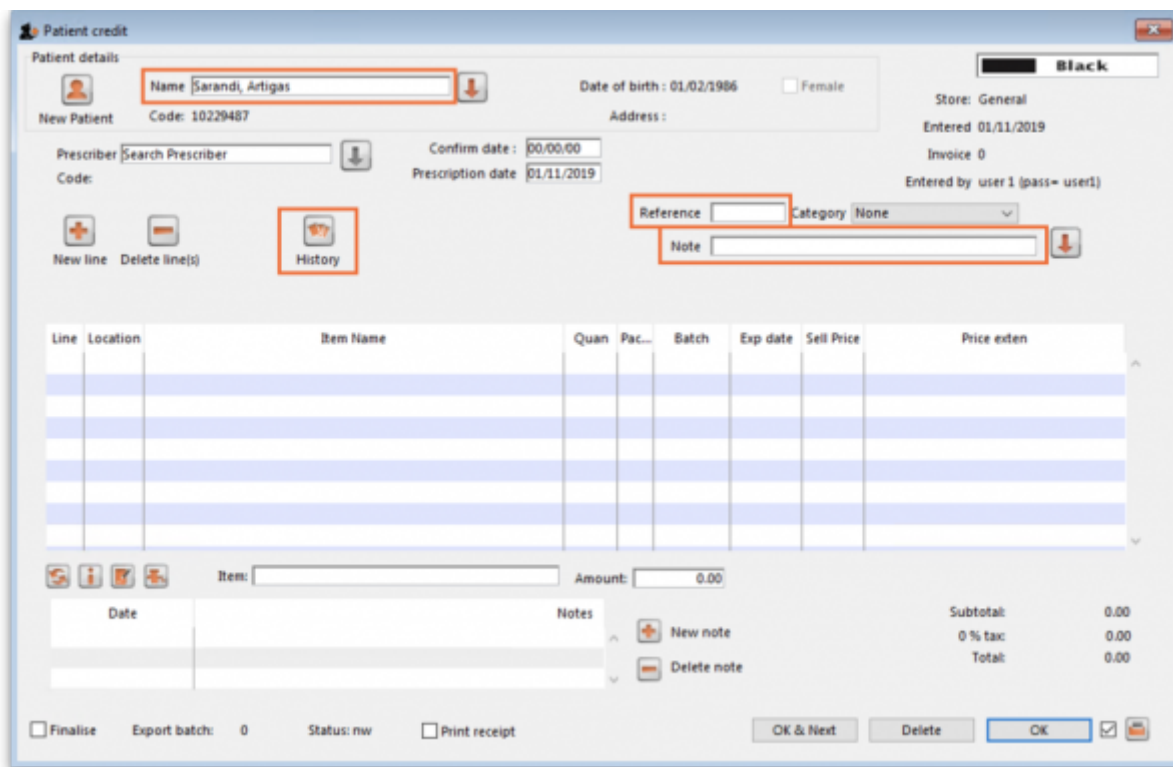
To create a new patient credit:

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:

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	

Buttons: 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 details: Name Sarandi, Artigas, Date of birth: 01/02/1986, Code: 10229487, Prescriber: Carretas, Julieta, Prescription date: 01/11/2019.

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, Total: -100.00

Buttons: Finalise, 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, there are fields for 'Prescriber' (Carretas, Julieta) and 'Prescription date' (01/11/2019). A summary box on the right shows the 'Invoice total' as 300.00, 'Total outstanding' as 300.00, 'Available credit' as 100.00, 'Amount paid by' as 200.00, and 'Amount paid by credit' as 100.00. The 'Amount paid by credit' value is highlighted with a red box. At the bottom, there are buttons for 'Finalise', 'Export batch', 'Status', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

Cancellations for prescription payments

When a prescription is cancelled, any payment made against it is not automatically cancelled because the patient might give you the goods back but not receive a cash refund. However, a patient credit is automatically created equal to the amount of the payment and assigned to the patient. This means the patient is refunded in credit, not cash.

If you really wish to refund cash to the patient, you need to find the patient credit created for them, cancel it and then go to the [cash register](#) and enter a cash out transaction for the patient. This will appear as a “ps” type transaction in the register. It is a good idea to have a separate *Option* ([16.10. Options \(standard reasons\)](#)) for this type of cash out payment to allow you to report on them separately from other types of cash out transactions.

Previous: [11.02. Receiving payment from customers](#) | | Next: [11.04. Cash register](#)

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