# 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 Prescribe Code:	Name Patient, Test t Code: testp01 tr Search Prescriber	Ŧ	Confirm date : Prescription date	Date 27/04/2020	of birth Address	: 00/00/00		Female	Store: AKPESSE Entered 27/04/202 Invoice 289 Entered by Sussel	Black KRO (CSR-D PUBL )
New Ine	Delete line(s) ment	History Repeats			Re	Note		ategory No	ne v	L
Line Loc	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	E tem			Notes	nt: [	0.00 New note Delete note			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. The **Total payment** field shows the amount that needs to be paid by the patient. Enter the amount the patient actually gives you in the **Amount given** field, then press the *Tab* key on the keyboard:

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2	Name Patient, Test		L	Date of birth : 23/11/1974	Female	Store	AKPESSEKR	Black
New Patient Presoniter Se Code:	Code: Testp01		Confirm date : 00/0 Prescription date 04/0	Address : 5000 5/2020		Entere Invoice Entered by	d 04/06/2020 e 431 y Sussol	
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3. In this example, the prescription cost is \$300 and the patient will pay with a \$500 note, so 500 is entered in the **Amount given** field and the *Tab* key pressed. mSupply then shows you the change that is to be given back to the patient in the **Change to give back** field:

New Patient	Name Patient, Test Code: Testp01	Ţ	Date	of birth : 23/11/1974 Address :	Female		Store: AK	Black PESSEKRO (CSR-D 06/2020	PUB
Prescriber S Code:	earch Prescriber	Confirm date : Prescription date	00/00/00				Invoice 431 Entered by Sus	isol	
Other details	t		Tr	р Рау					_
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	Cheque #		P	alient's credit status Current balance Credit limit syment details		0.00 0.00	Total to pa Available cred	y 300 8 0.00	-
	Cheque #		P	atient's credit status Current balance Credit limit syment details		0.00 00.0 0.0	Total to pa Available cred mount paid by cred rount paid by patien	y 300 8 0.00 8 0.00	
	Cheque #		P	ationt's credit status Current balance Credit limit syment details Select the payment type	v	0.00 0.00 An An	Total to pa Available ored mount paid by cred ount paid by patien Total paymen Amount give Change to give bec	y 300 # 0.00 # 0.00 # 300.00 # 300 # 300 # 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 given** field to be more than the **Total payment** amount the **Amount given** field will be reduced to the **Total payment** amount and the **Change to give back** will be increased by the difference.

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) 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 **Patient's credit status** section and the amount of credit used to pay for the prescription in the **Amount paid by credit** field:

ew Patient	Name Code:	Patient, Test Testp01		J		Date of birth : 23/11/1974 Address :	Female		Store: AK	Black PESSEKRO (CSR-D 06/2020	PUBL
Prescriber , Code:			Pr	Confirm date : escription date	04/06/2020	0			Invoice 431 Entered by Sur	isol	
ems Payment											
ormer details						TO Pay			Invoice tot	al 300.00	
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In this example, the patient has 100 credit available (made up of their credit limit only, which is 100) and all of that credit has been used to pay the prescription charge.

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 of credit used in the **Amount paid by credit** field and press the *Tab* key on the keyboard so that mSupply re-calculates the amount to be paid by the patient. Here is a screenshot if the patient in the example above decides to pay 250 towards their prescription and only use 50 of their credit:

itent details	Name	Patient, Test		ł	C	ate of birth : 23/11/1974	Female	Store: AKPES	Black SSEKRO (CSR-D PUBI
New Patient Prescriber , Code:	Code:	Testp01		Confirm date : Prescription date	04/06/2020	Address :		Entered 04/06/ Invoice 431 Entered by Susse	12020
terns Payment Other details						То Рау		Invoice total	300.00
The second se									
This invoice (	Chequi	nometically finalise	d if a payment is er	tered.	Ľ	Patient's credit status Current belance Credit limit	100.00 100.00	Total to pay Available credit	300
This invoice t	Chequi Ni	torraticelly finalise	d if a payment is er	tered.		Patient's credit status Current balance Credit limit Payment details Belect the payment type	100.00 100.00 An	Total to pay Available credit mount paid by credit nount paid by patient Total payment Amount given Change to give back	300 100.00 50.00 250.00 250 0 0

### **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 nything if you want to see the default 15 most recent prescriptions):

•	•					Trans	sactions list						
(	ind Sum	Order by	Export to Excel	Finalise Dupl	icate	2	ancel Filter	rs Customise	Modify	Export to	MYOS		
	Types		Store name	Name	Type	St	Entered	Confirmed	Invoum	Total	Their ref	Pickslip pri	Comme
		-	0.020.010800	Général, Patient	23	cn	21/05/2020	21/05/2020	443	-441			
	Supplier invoices	-	0.08.01600	Patient, Test	ci	fn	18/05/2020	18/05/2020	442	58			
	Inventory adjustments	-	er carriero	Général, Patient	ci	fn	07/05/2020	07/05/2020	437	29			
	Supplier credits	-	0.08.0480	Général, Patient	ci	fn	07/05/2020	07/05/2020	436	29		07/05/2020	
	Customer condite	-	0.08.0480	Général, Patient	ci	fn	02/05/2020	02/05/2020	435	58			Offset for atr
	Customer creats	-		DISTRICOUKRO	ci	fn	01/05/2020	01/05/2020	433	20000			Offset for atr
	Builds		0.02.04000	Général, Patient	ci	fn	01/05/2020	01/05/2020	432	58		01/05/2020	
	Repacks	_		Général, Patient	ci	5n	01/05/2020	01/05/2020	431	87			
۹.	Find		0.020.02000	Général, Patient	ci	cn	01/05/2020	01/05/2020	430	0			
	By date	_		DISTRICOUKRO	65	fn	01/05/2020	01/05/2020	429	-20000			Offset for atr.
	By status	_	0.000.00000	Général, Patient	cc.	6n	01/05/2020	01/05/2020	427	-100			Offset for atr.
	My transactions												
	My custom filters												
	0/11/67561							-			_		

Patient credits have *cc* (for "customer credit") in the *Type* column, prescriptions have a type of *ci*. Iy 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:

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

ew Patient	Name Sarandi, Artig Code: 10229487	jas	Ţ	Date	of birth Address	: 01/02/198	6	Female	Store: General Entered 01/11/2019	ack
Prescriber S Code:	earch Prescriber	History	Confirm date : Prescription date	00/00/00	Re	ference Note	-	ategory Non-	Invoice 0 Entered by user 1 (pass- u e	sed)
Line Locatio	In	Item Name		Quan	Pac	Batch	Exp date	Sell Price	Price exten	-
S i E	e Rem:			Amou	nt:	0.00 New note Delete no	te		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	
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.

itent details   Name Sarandi, Artigas   ew Patient Code: 10229487   Prescriber Carretas, Julieta   Code: CAR   Image: Code: Delete line(s)   New line Delete line(s)	Confirm date : Prescription date	Date 0.00.00	of birth Address Ref	: 01/02/1984 : erence Note Pat	5 Fe	male egory None expired iter	Black Store: General Entered 01/11/2019 Invoice 22 Entered by user1 (pass= user1)
Line Location Item Name		Quan 1	Pac	Batch YRT445	Exp date 31/01/2019	Sell Price 100.00	Price exten
Date		Amour	nt:	0.00 New note Delete not	te		Subtotal: -100.00 0 % tax: 0.00 Total: -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**.



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.

ent details	Name	Patient, Test		J	1	Date of birth : 23/11/1974	Female		Store: AKI	Blad PESSEKRO (CSI	: k 8-D PUBLI
Prescriber	Code:	Testp01		Confirm date : Prescription date	04/06/2020	Address :			Entered 04/1 Invoice 431 Entered by Sus	06/2020	
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### **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.

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