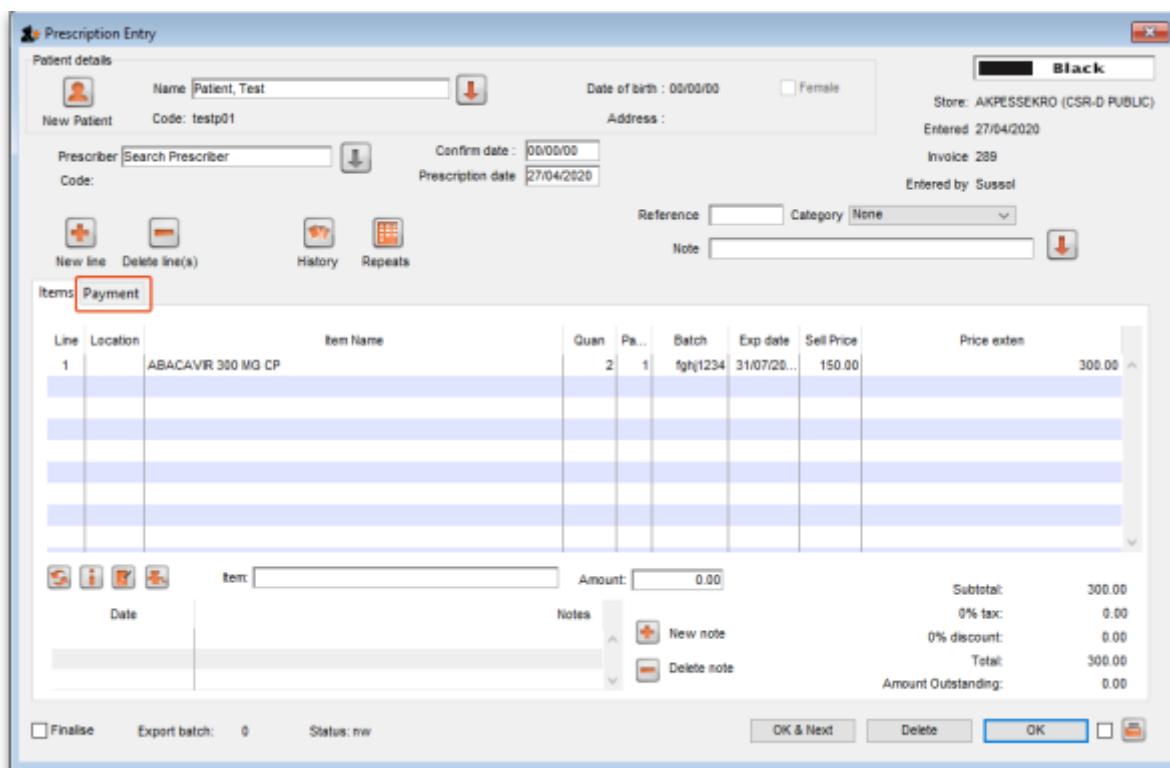


11.03. Prescription payments and credits

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:



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:

Prescription Entry

Patient details

	Name: Patient, Test	<input type="button" value=""/>	Date of birth: 23/11/1974	<input type="checkbox"/> Female
New Patient	Code: Testp01		Address:	
Prescriber: <input type="text" value="Search Prescriber"/>	Confirm date: <input type="text" value="00/00/00"/>	Prescription date: <input type="text" value="04/06/2020"/>		
Code:				

Store: AKPESSEKRO (CSR-D PUBLIC)
Entered: 04/06/2020
Invoice: 431
Entered by: Sussel

Items **Payment**

Other details

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

Cheque # <input type="text"/>	Note <input type="text"/>
-------------------------------	---------------------------

To Pay

Invoice total <input type="text" value="300.00"/>
Total to pay <input type="text" value="300"/>

Patient's credit status

Current balance <input type="text" value="0.00"/>	Credit limit <input type="text" value="0.00"/>	Available credit <input type="text" value="0.00"/>
---	--	--

Payment details

Select the payment type <input type="button" value=""/>	Amount paid by credit <input type="text" value="0.00"/>
	Amount paid by patient <input type="text" value="300.00"/>
	Total payment <input type="text" value="300"/>
	Amount given <input type="text" value="0"/>
	Change to give back <input type="text"/>

Finalise Export batch: 0 Status: new Print receipt

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:

Prescription Entry

Patient details

	Name: <input type="text" value="Patient, Test"/>	<input type="button" value=""/>	Date of birth: <input type="text" value="23/11/1974"/>	<input type="checkbox"/> Female
New Patient	Code: <input type="text" value="Testp01"/>	Address: <input type="text"/>		
Prescriber: <input type="text" value="Search Prescriber"/>	Confirm date: <input type="text" value="00/00/00"/>	Prescription date: <input type="text" value="04/06/2020"/>		
Code: <input type="text"/>				

Black

Store: AIKPESEKRO (CSR-D PUBLIC)
Entered: 04/06/2020
Invoice: 431
Entered by: Sussol

Items **Payment**

Other details

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

Cheque # <input type="text"/>	To Pay		
Note: <input type="text"/>	Invoice total	300.00	
	Total to pay	300	

Patient's credit status

Current balance	0.00	Available credit	0.00
Credit limit	0.00		

Payment details

Select the payment type <input type="button" value=""/>	Amount paid by credit <input type="text" value="0.00"/>
	Amount paid by patient <input type="text" value="300.00"/>
	Total payment <input type="text" value="300"/>
	Amount given <input type="text" value="500"/>
	Change to give back <input type="text" value="200"/>

Finalise Export batch: 0 Status: nw Print receipt

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.



Once you click OK, the prescription and payment are finalised and can no longer be edited. Check carefully before pressing OK!

Please note: You can save a prescription without a payment

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:

Prescription Entry

Patient details

Name: Patient, Test Date of birth: 23/11/1974 Female

Code: Testp01 Address:

Prescriber: Confirm date: 04/06/2020

Code: Prescription date: 04/06/2020

Store: AKPESSEKRO (CSR-D PUBLIC) Entered: 04/06/2020

Invoice: 431 Entered by: Susan

Items: Payment

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	100.00	Credit limit	100.00	Available credit	100.00
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Payment details

Select the payment type

Amount paid by credit	100.00
Amount paid by patient	200.00
Total payment	200

Amount given: 0

Change to give back: 0

Finalise Export batch: 0 Status: on Print receipt

OK & Next Delete OK

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:

Prescription Entry

Patient details

Name: Patient, Test
Code: Testp01

Date of birth: 23/11/1974
Female

Address:

Prescriber:
Code:

Confirm date: 04/06/2020
Prescription date: 04/06/2020

Store: AKPESSEKRO (CSR-D PUBLIC)
Entered: 04/06/2020
Invoice: 431
Entered by: Sussel

Items Payment

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 100.00
Credit limit 100.00 Available credit 100.00

Payment details

Select the payment type

Amount paid by credit 50.00
Amount paid by patient 250.00
Total payment 250
Amount given 0
Change to give back

Finalise Export batch: 0 Print receipt

OK & Next Delete OK Cancel

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):

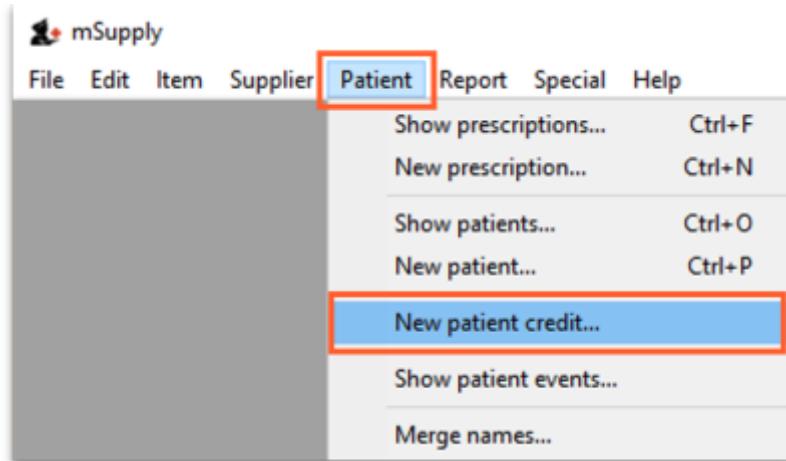
Types	Store name	Name	Type	St...	Entered	Confirmed	Invnum	Total	Their ref	Pickslip pri...	Comm
Patient prescriptions	Général, Patient	cc	cn	21/05/2020	21/05/2020		443	-441			
Supplier invoices	Patient, Test	cl	fm	18/05/2020	18/05/2020		442	58			
Inventory adjustments	Général, Patient	cl	fm	07/05/2020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

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

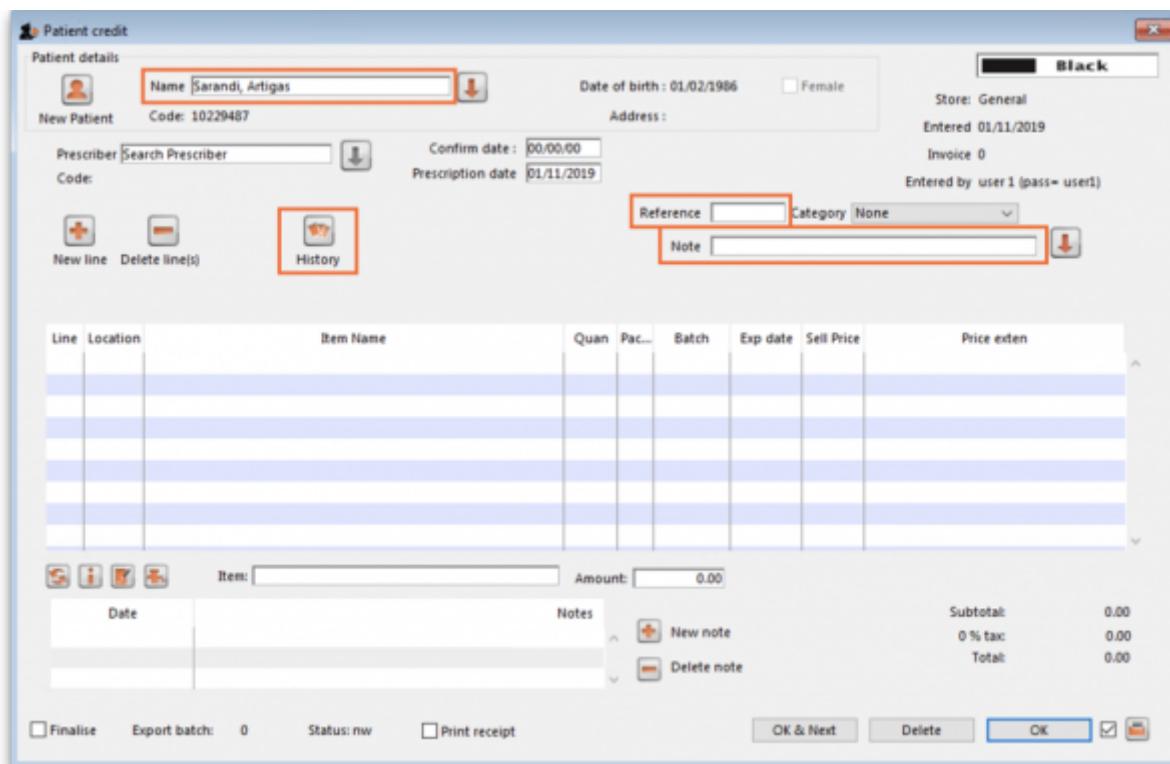
To create a new patient credit:

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:

History for Sarandi, Artigas

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	

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 credit

Patient details

	Name: Sarandi, Artigas	Date of birth: 01/02/1986	<input type="checkbox"/> Female
New Patient	Code: 10229487	Address:	
Prescriber: Carretas, Julieta	Confirm date: 00/00/00	Store: General	
Code: CAR	Prescription date: 01/11/2019	Entered 01/11/2019	
		Reference:	Category: None
	Note: Patient returning expired item dispensed in error		

Entered by user 1 (pass= user1)

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

New note Delete note

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

Finalise Export batch: 0 Status: mw 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.

Prescription Entry

Patient details

- Name: Patient, Test
- Date of birth: 23/11/1974
- Female
- Address:
- Prescriber:
- Confirm date: 04/06/2020
- Prescription date: 04/06/2020

Store: AKPESSEKRO (CSR-D PUBLIC)
Entered: 04/06/2020
Invoice: 431
Entered by: Sussel

Items **Payment**

Other details

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

Cheque #:

To Pay

Invoice total: 300.00

Total to pay: 300

Patient's credit status

Current balance	100.00
Credit limit	100.00
Available credit	100.00

Payment details

Select the payment type:

Amount paid by credit	100.00
Amount paid by patient	200.00
Total payment	200
Amount given	0
Change to give back	

Finalise Export batch: 0 Status: on Print receipt OK & Next Delete 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 payment type [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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