

# 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. The 'Payment' tab is selected and highlighted with a red box. The window contains various fields for patient and prescription details, a table for items, and a summary section at the bottom.

Line	Location	Item Name	Quan	Pa...	Batch	Exp date	Sell Price	Price exten
1		ABACAVIR 300 MG CP	2	1	fgt/1234	31/07/20...	150.00	300.00

Summary section:

Subtotal:	300.00
0% tax:	0.00
0% discount:	0.00
Total:	300.00
Amount Outstanding:	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:

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 00/00/00 Female ☐ Store: AKPESSEKRO (CSR-D PUBLIC)  
 New Patient Code: testp01 Address: Entered: 27/04/2020  
 Prescriber: Search Prescriber Confirm date: 00/00/00 Invoice: 289  
 Code: Prescription date: 27/04/2020 Entered by: Sussal

**Items: Payment**

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

Cheque #:   
 Note:

Invoice total	300.00
Total outstanding	300.00
Available credit	0.00
Amount paid by patient	300.00
Amount paid by credit	0.00

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt OK & Next Delete 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:

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 23/11/1974 Female ☐ Store: AKPESSEKRO (CSR-D PUBLIC)  
 New Patient Code: Testp01 Address: Entered: 04/06/2020  
 Prescriber: Search Prescriber Confirm date: 00/00/00 Invoice: 431  
 Code: Prescription date: 04/06/2020 Entered by: Sussal

**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	0.00
Credit limit	0.00
Available credit	0.00

**Payment details**

Amount paid by credit	0.00
Amount paid by patient	300.00
Total payment	300
Amount given	500
Change to give back	200

☐ Finalise Export batch: 0 Status: nw ☐ Print receipt OK & Next Delete 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) 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:

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 04/11/1963 Female  
New Patient Code: pattest Address:  
Prescriber: Search Prescriber Confirm date: 00/00/00  
Code: Prescription date: 18/05/2020 Patient type: Inpatient  
Store: AKPESSEKRO (CSR-D PUBLIC)  
Entered: 18/05/2020  
Invoice: 442  
Entered by: Sussol

**Items Payment**

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

Cheque #  
Note

Select Insurance

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

☐ Finalise Export batch: 0 Status: nw ☐ 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 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:

**Prescription Entry**

**Patient details**

Name: Patient, Test  
 Date of birth: 23/11/1974  
 Female  
 Store: AKPESSEKRO (CSR-D PUBLIC)  
 Entered: 04/06/2020  
 Invoice: 431  
 Entered by: Susael

**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: 300.00

**Patient's credit status**

Current balance	100.00	Available credit	100.00
Credit limit	100.00		

**Payment details**

Amount paid by credit	100.00
Amount paid by patient	200.00
<b>Total payment</b>	<b>300.00</b>
Amount given	0
Change to give back	

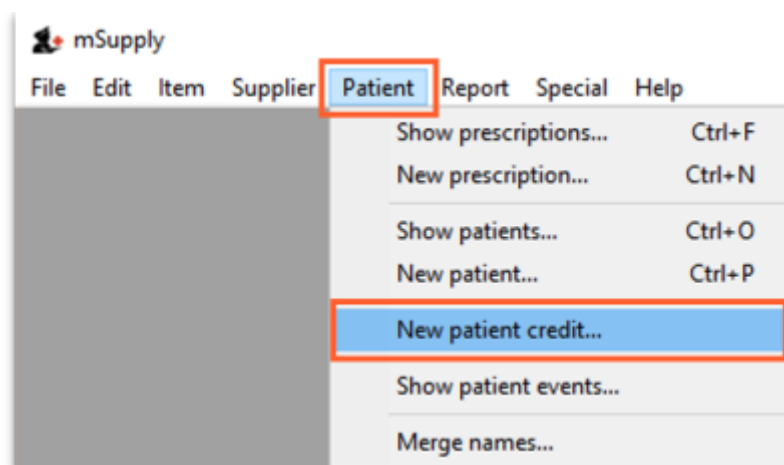
☐ Finalise    Export batch: 0    Status: on    ☐ Print receipt               

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:

**Patient credit**

**New Patient**

**Name**

**Date of birth:** 01/02/1986 ☐ Female

**Code:** 10229487

**Address:**

**Store:** General

**Entered:** 01/11/2019

**Invoice:** 0

**Entered by:** user1 (pass= user1)

**Prescriber:**

**Confirm date:**

**Prescription date:**

**New line**

**Delete line(s)**

**History**

**Reference:**

**Category:**

**Note:**

Line	Location	Item Name	Quan	Pac...	Batch	Exp date	Sell Price	Price exten

**Item:**

**Amount:**

**Date**

**Notes**

**New note**

**Delete note**

**Subtotal:** 0.00

**0 % tax:** 0.00

**Total:** 0.00

☐ Finalise

**Export batch:** 0

**Status:** nw

☐ Print receipt

☒

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:

[illegible]

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

New line Delete line(s) History

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

Item: Amount: 0.00

Date Notes

New note Delete note

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.

**Prescription Entry**

**Patient details**

Name:  Date of birth: 01/02/1986 ☐ Female  
New Patient Code: 10229487 Address:   
Store: General  
Entered: 01/11/2019  
Invoice: 23  
Entered by: user 1 (pass= user1)

Prescriber:  Confirm date:   
Code: CAR Prescription date:

**Items** **Payment**

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

Their ref:   
Note:

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

☐ Finalise Export batch: 0 Status: n/w ☐ Print receipt

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