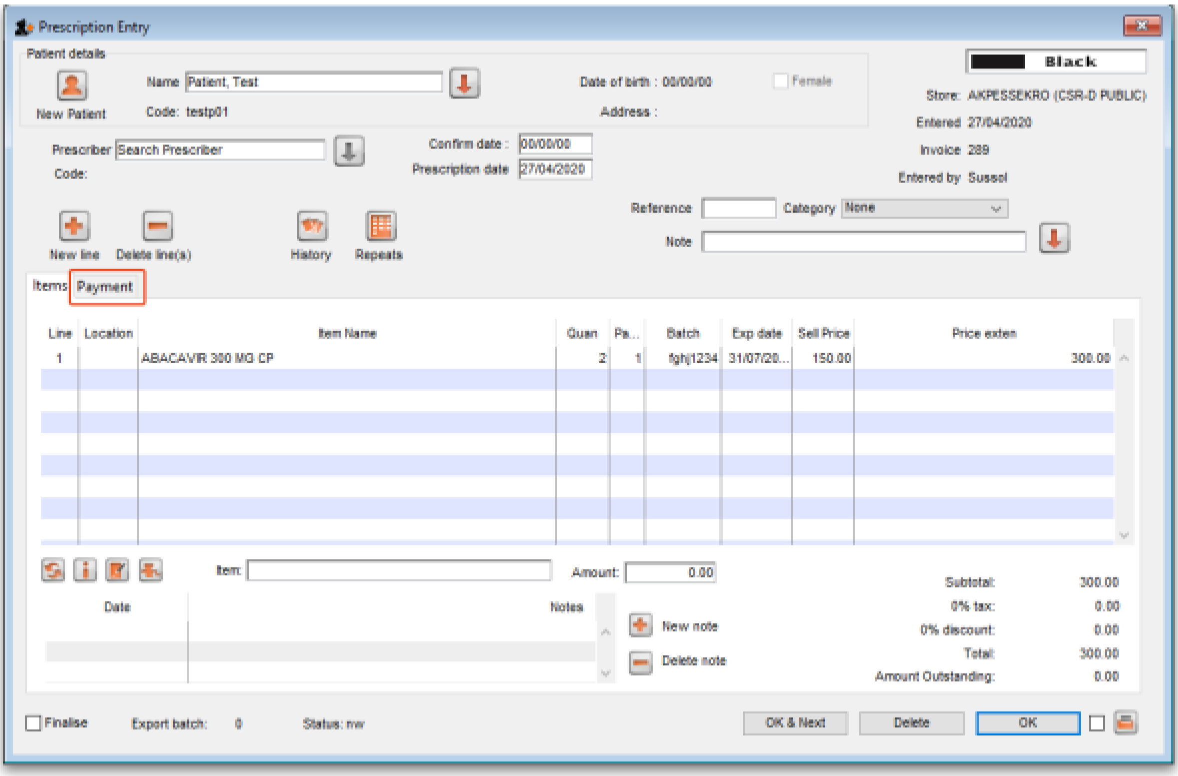
11.03. Prescription payments and credits

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:

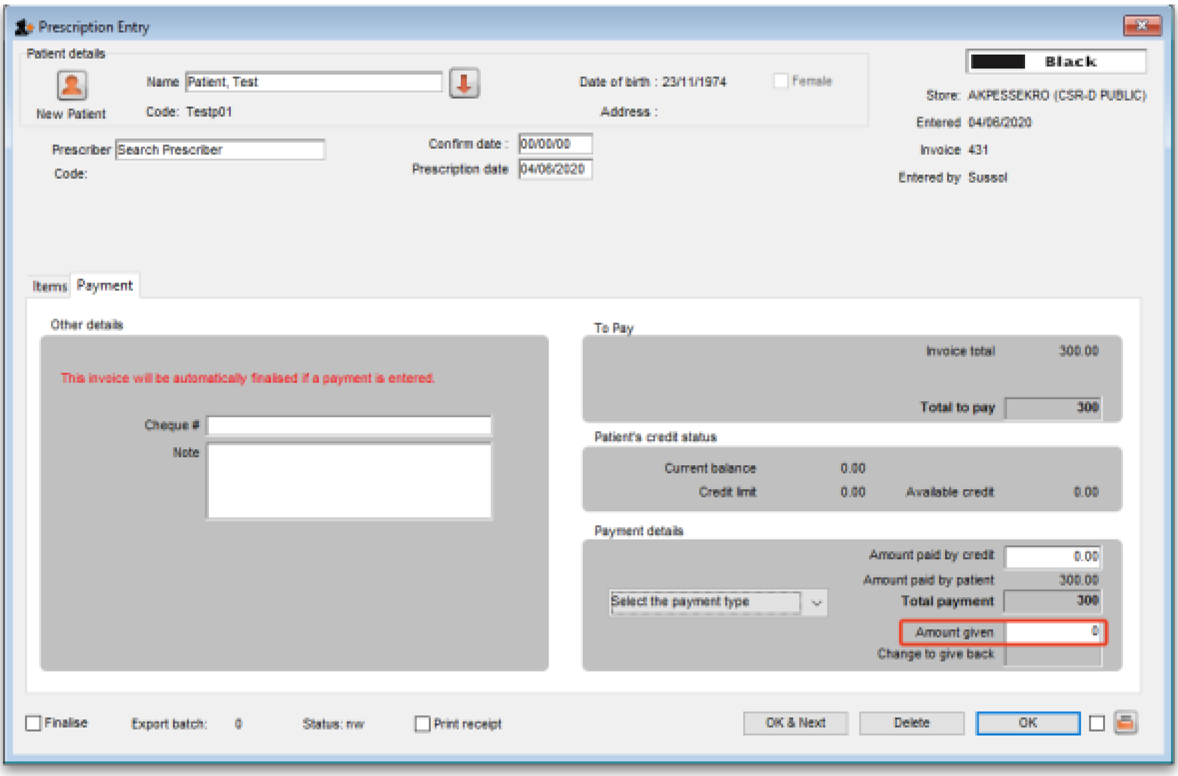


Entering the payment

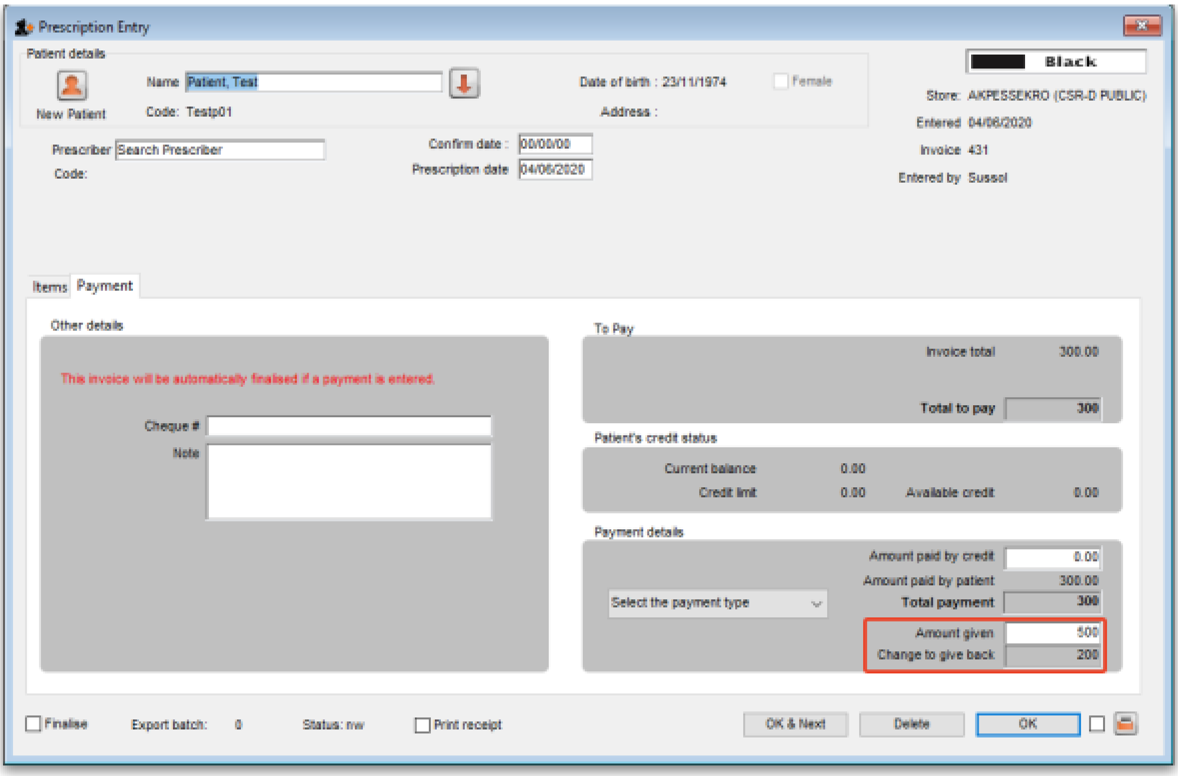
To enter a payment from the Prescription Entry window:

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:



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:



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 invoice total you will be shown a message and the **Amount given** will be reduced back down to the invoice total.

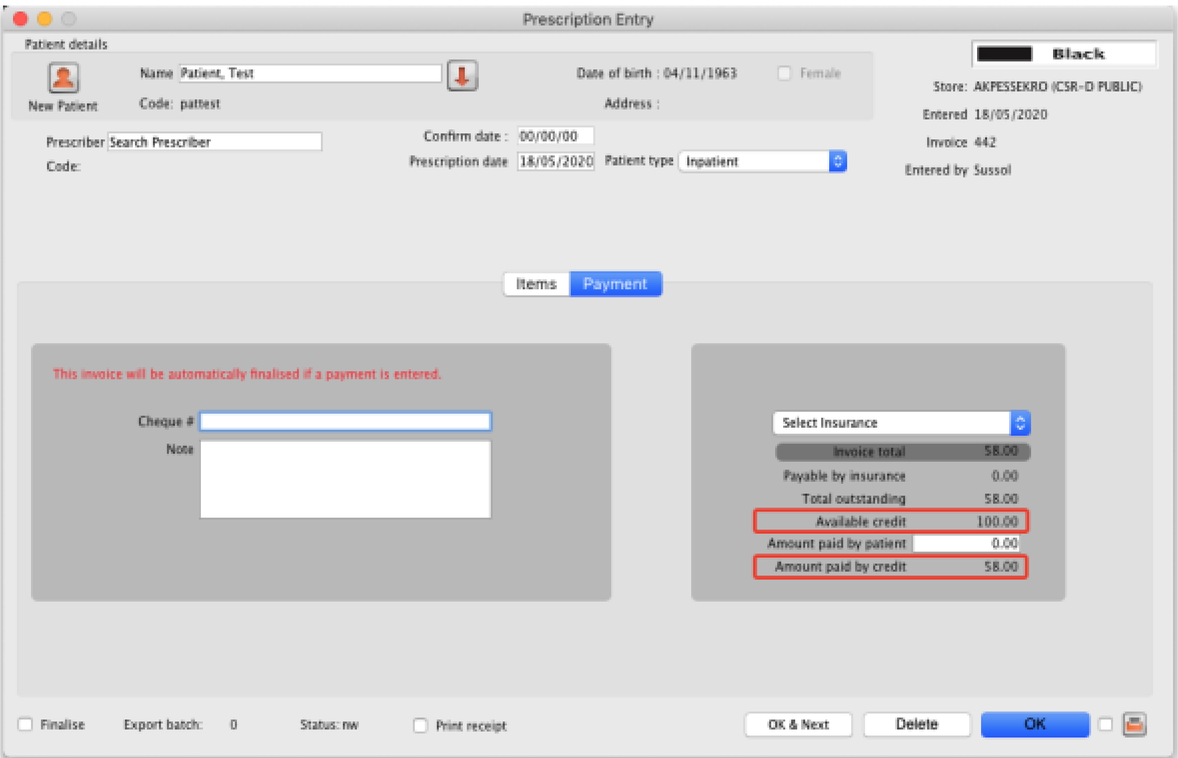
4. Click **OK** to **finalise** the prescription and payment and close the window (if a payment is entered the prescription will be automatically finalised, you have no choice). If the **Print receipt** checkbox is checked then a payment receipt will print at this point.

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

Paying with credit

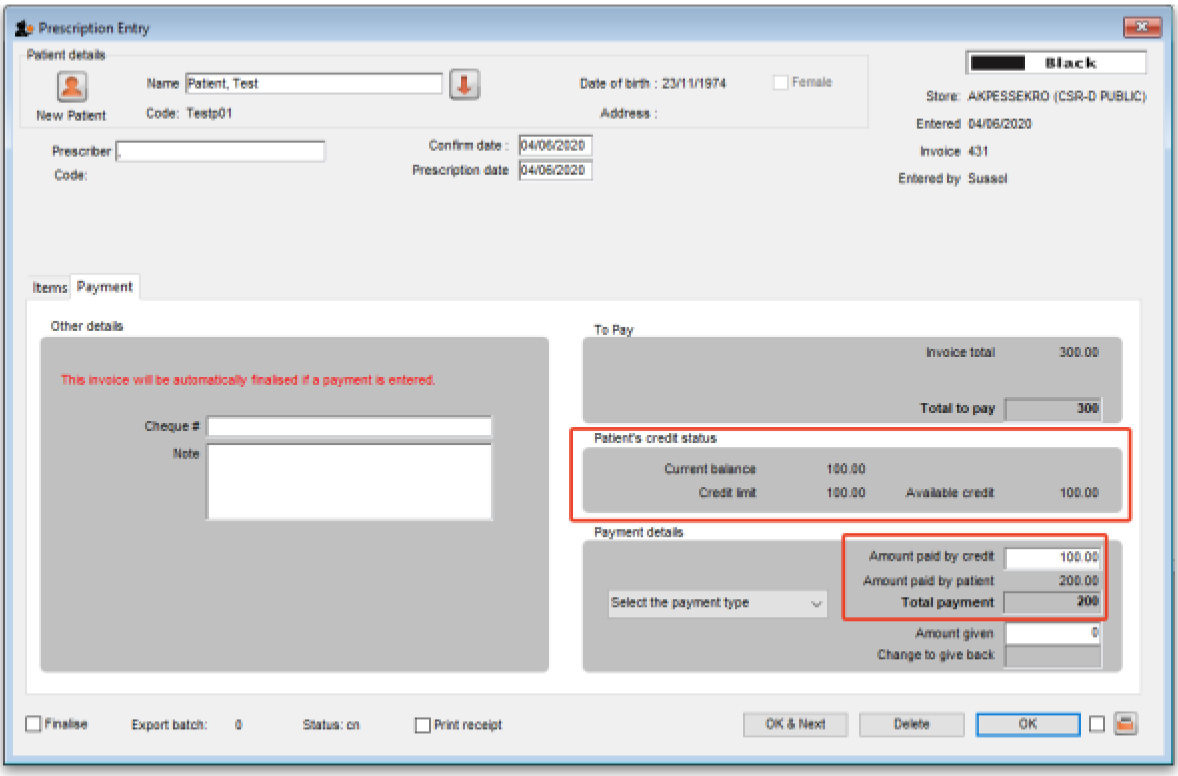
Patients can be given a credit limit (see 10.03. Patients) and can use some or all of that credit at any time to pay off some or all of a prescription. Patient credits (see below) and cash paid into the cash register by a patient will add to the amount of credit a patient can use.

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:



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:



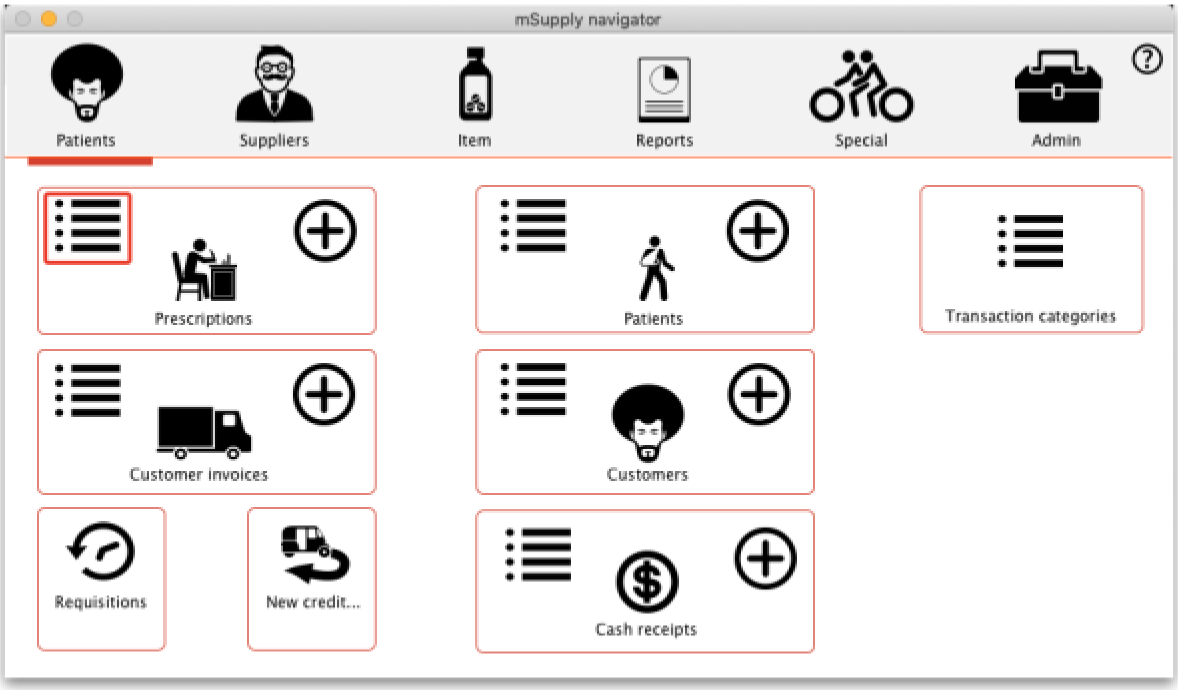
If the **Amount paid by patient** field is not zero when you click on the **OK** button, the change calculation window appears as normal. If **Amount paid by patient** field is zero when you click on the **OK** button, the prescription is simply closed as there is nothing more to be done - the prescription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

Patient credits

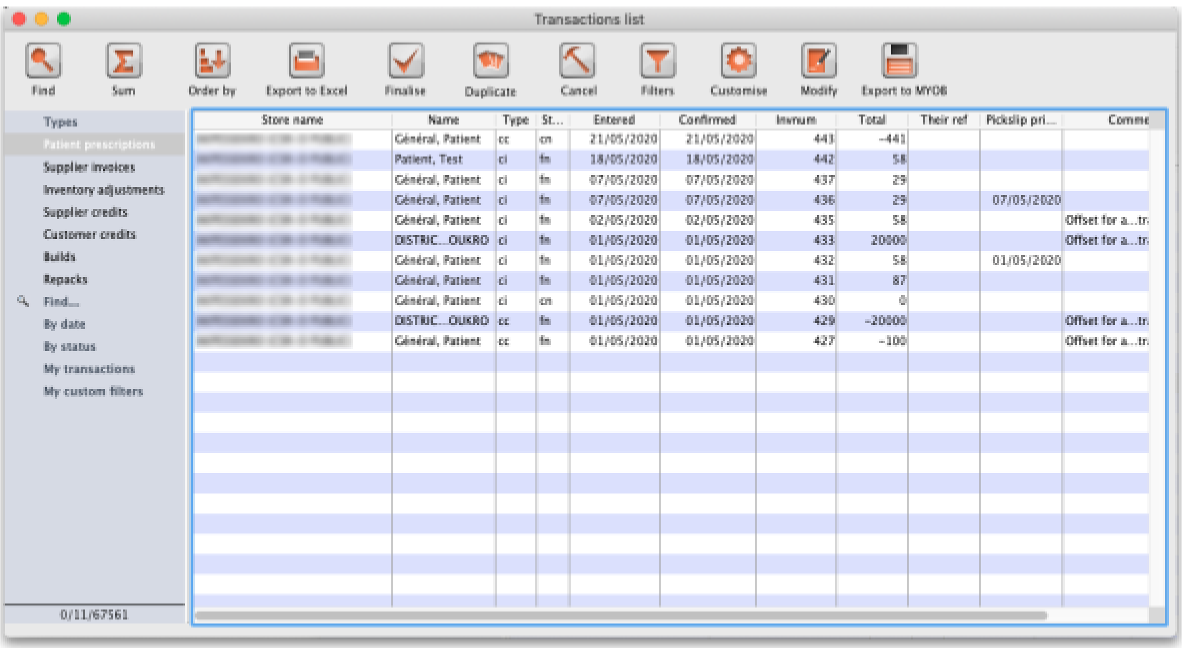
You can allocate funds in a patient's favour by giving them a **Patient Credit**. You might need to do this if, for example, a patient returns faulty medicines they already paid for. Creating a patient credit increases the amount of credit a patient has. Patient credit can be used to pay for future prescriptions.

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):

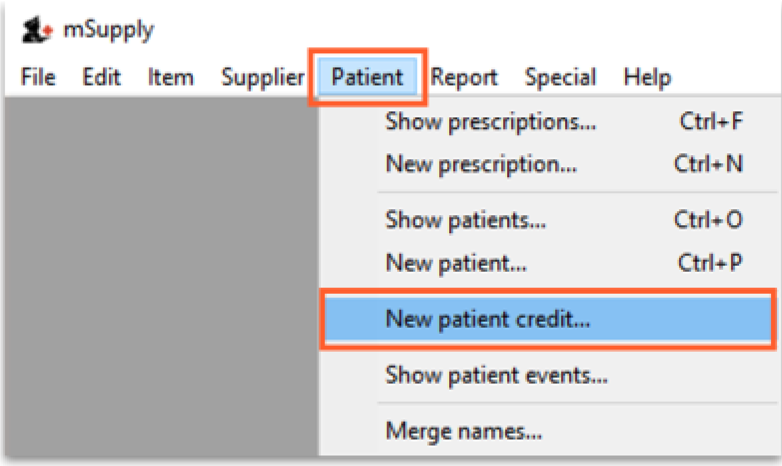


Patient credits have *cc* (for “customer credit”) in the *Type* column, prescriptions have a type of *ci*. IF you oinly wish to see patient credits then click on the **Customer credits** item on the left hand side.

Create patient credits

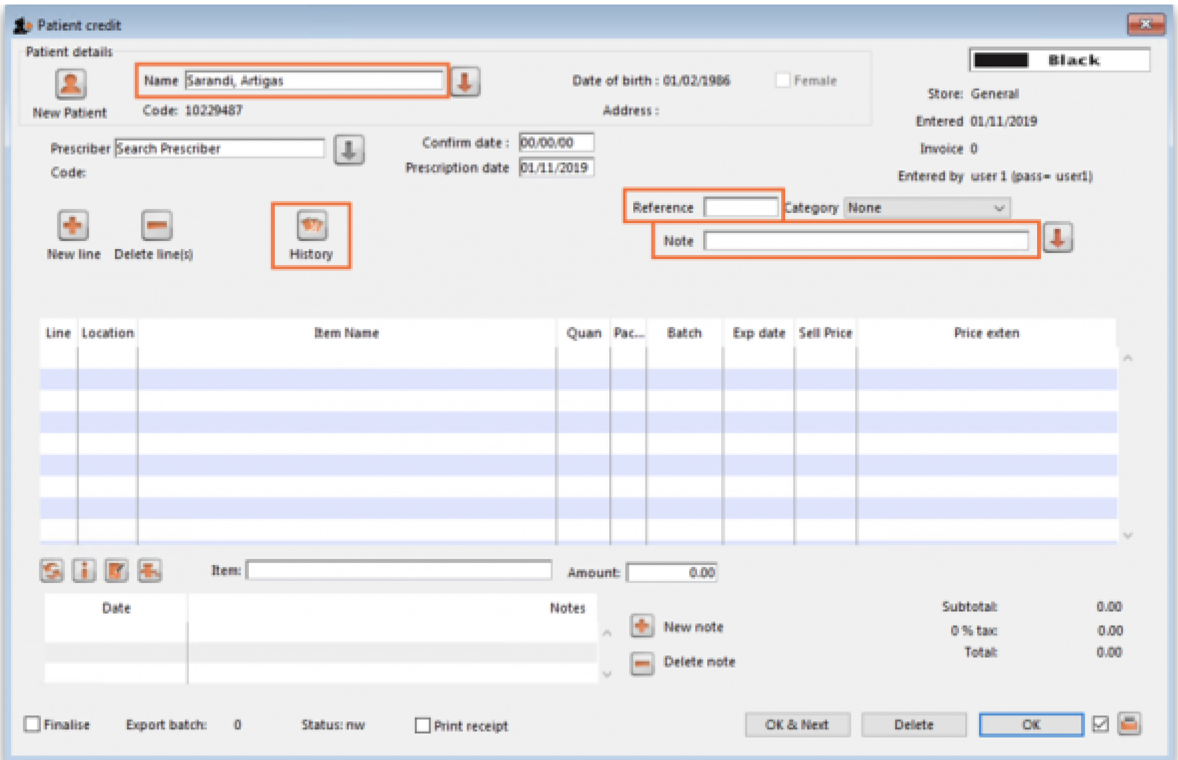
To create a new patient credit:

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

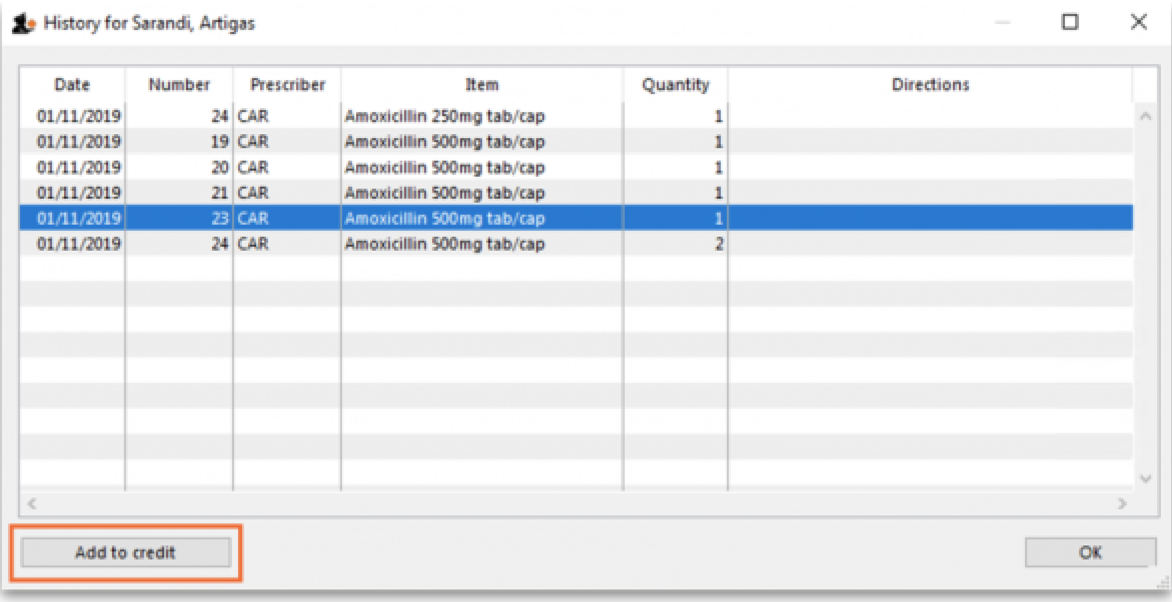


2. Enter the patient in the **Name** field just as you would for a prescription. You can also enter other details such as a **Reference** (e.g. the prescription number this patient credit is related to) and a **Note** explaining why a patient credit is being issued.

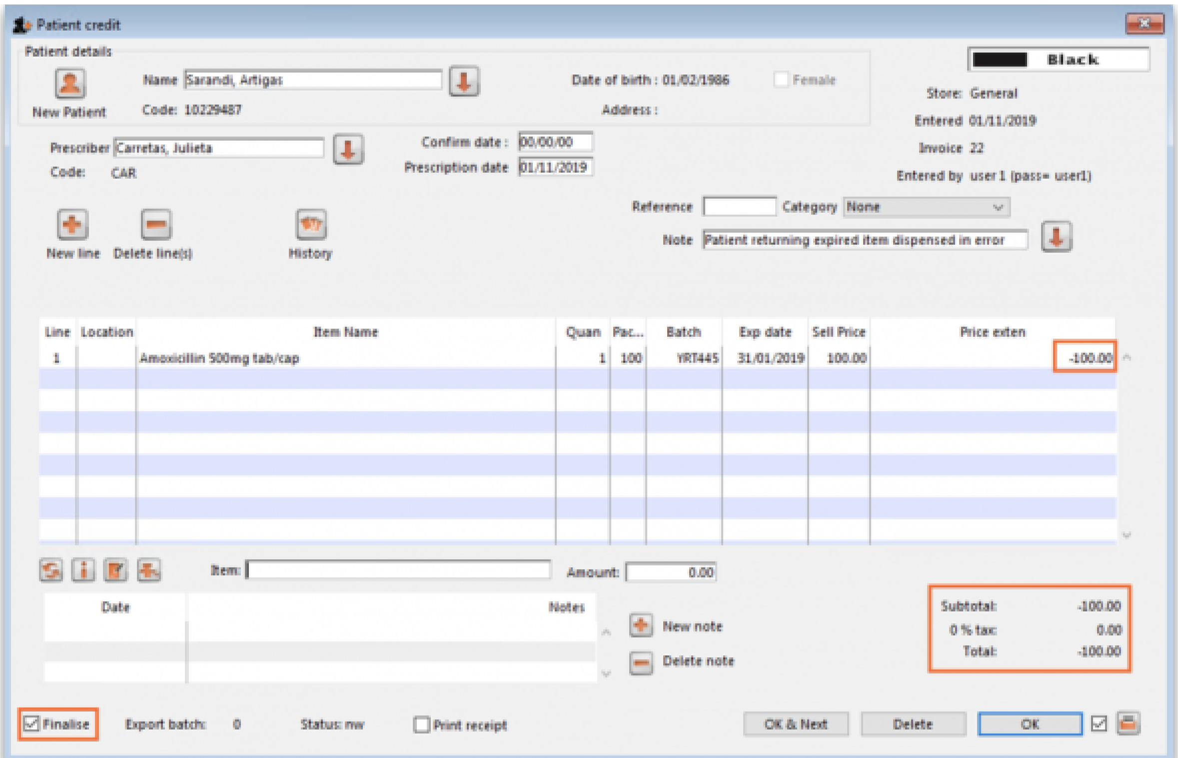
3. Click the **History** button to view the items previously dispensed to this patient:



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:



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.



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.

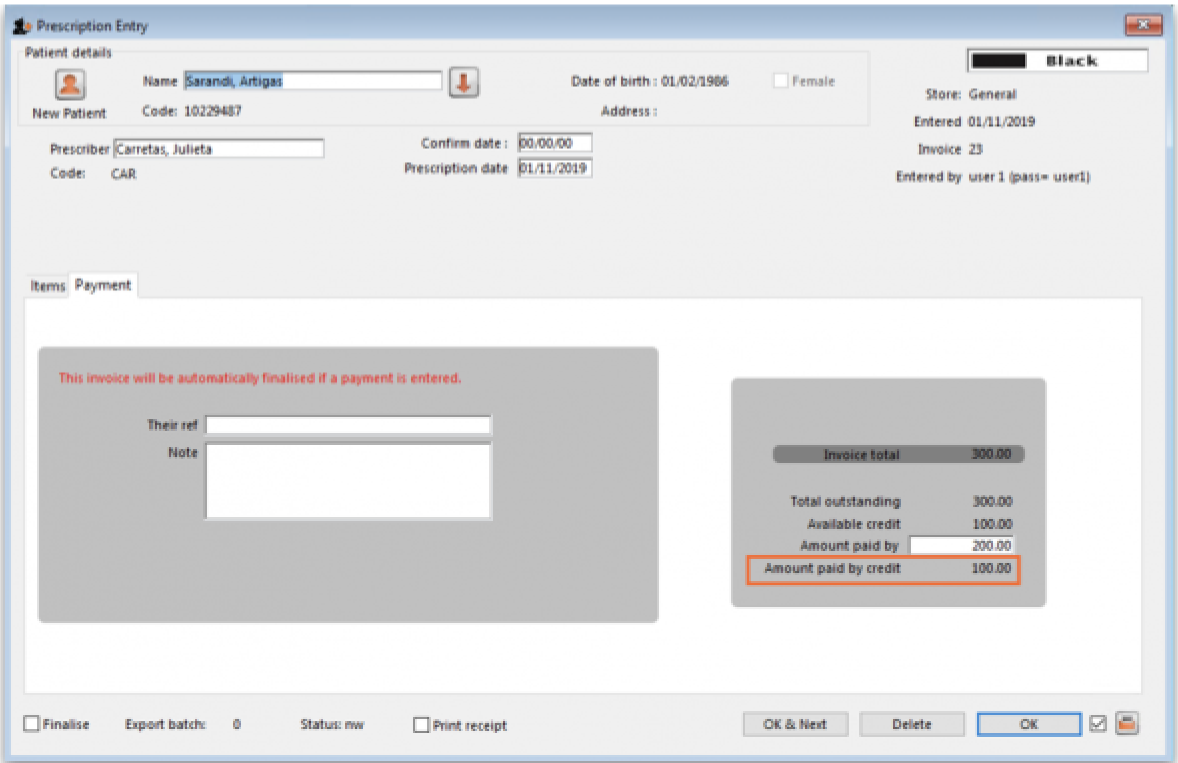
If you *only* want to allow users to issue patient credits for items linked to a patient's history, turn on the **Limit patient credits to previously prescribed items** preference in the *Invoices 2* tab of **File > Preferences** (see Invoices 2 Preferences). This will disable the **New line** button, 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.



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***