FHSDB McMaster

# HOW TO CREATE AN UNLINKED PAYMENT

TARGET AUDIENCE: *DISTRIBUTOR*

Updated April 27, 2023

## Overview

In addition to distributing and approving linked payments (i.e. payments informed by scheduling information), you also have the option of creating unlinked payments for activities outside of the schedule. Unlinked payments can also be used to make corrections if you paid a preceptor in error.

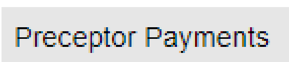
## Login to FHS DB

Login to the system using your MacID/password or local login.

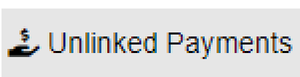
If you have any questions about how to login, refer to this user guide on our website ***How to Login to FHS DB***

## How to Create an Unlinked Payment

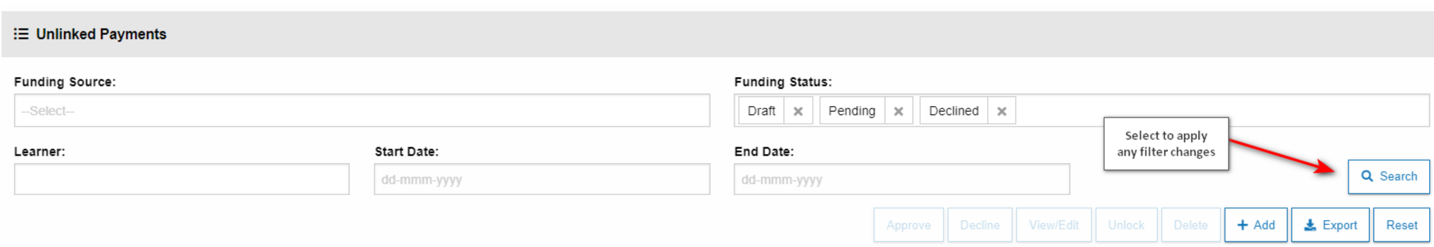
Select "Payments and Contributions" on the left-hand menu on the MedSIS homepage.




Select "Unlinked Payments" in the left-hand menu.




Once you select unlinked payments you will see all "Pending," "Draft" or "Declined" unlinked payments that you have entered. These funding status' will always be the default, but you have the option of filtering the information by funding source, learner, status, and date when the payment was entered. Please remember to select "Search" after making changes to your filters or they will not be applied.




If you want to look up specific information outside of the filter options, please use the "Filter Grid" search function at the bottom of the dashboard.

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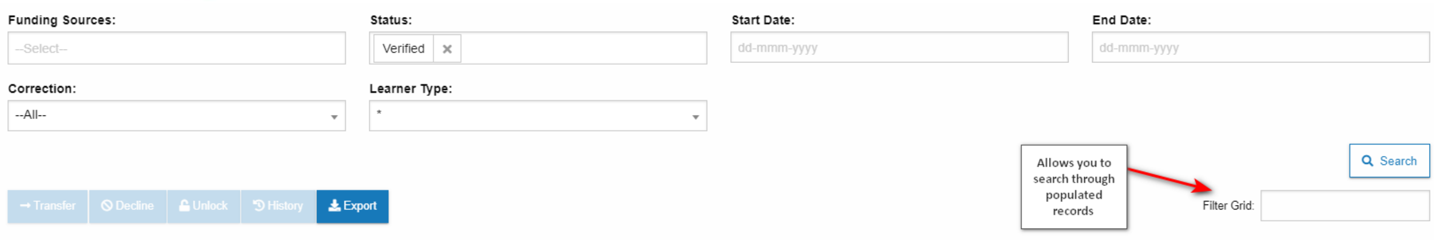
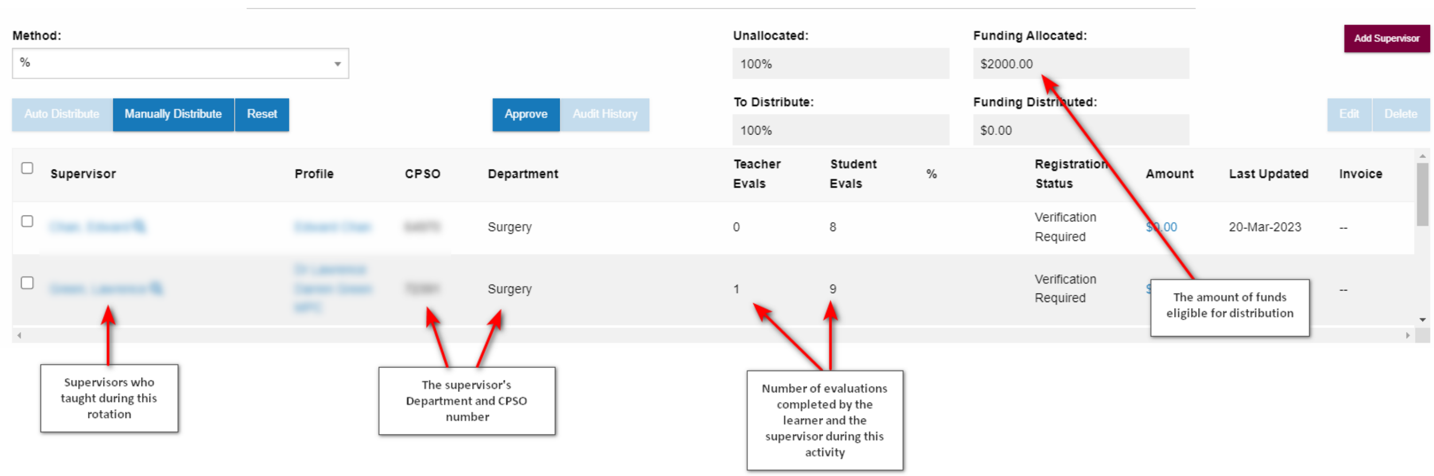
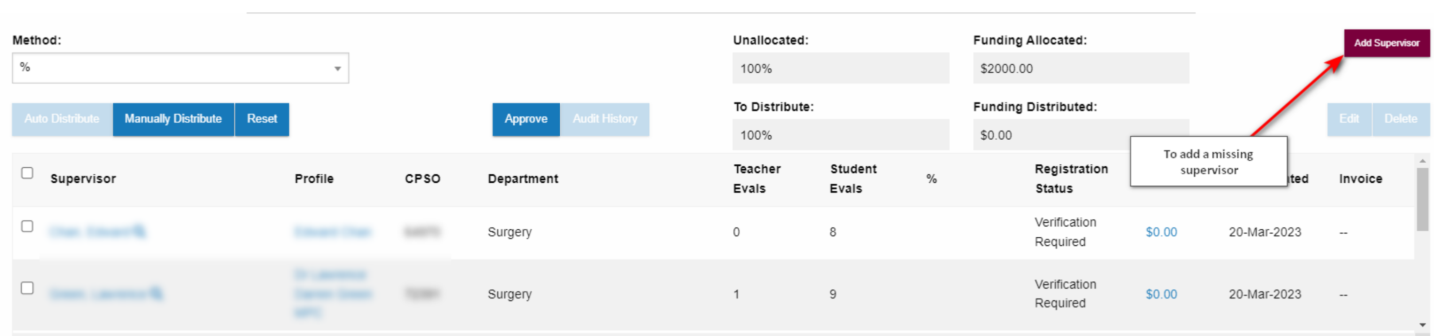



**Step 1:**

To distribute preceptor payments for a rotation, you will need to select the rotation. Once you do, all the supervisor information attached to that rotation will appear at the bottom of the page. This includes…




If you do not see a supervisor that should be attached to a rotation, you have the option of adding a supervisor manually.

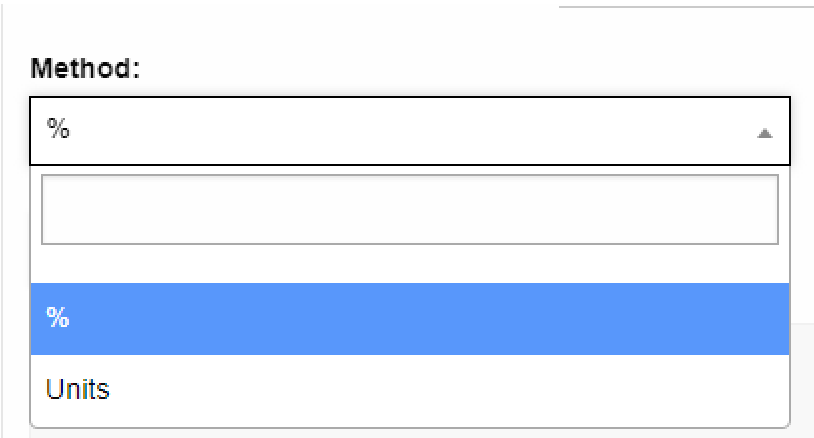



If the supervisor is not on the list, please contact preceptor.payments@mcmaster.ca providing both the preceptors name, email address and CPSO (if applicable).

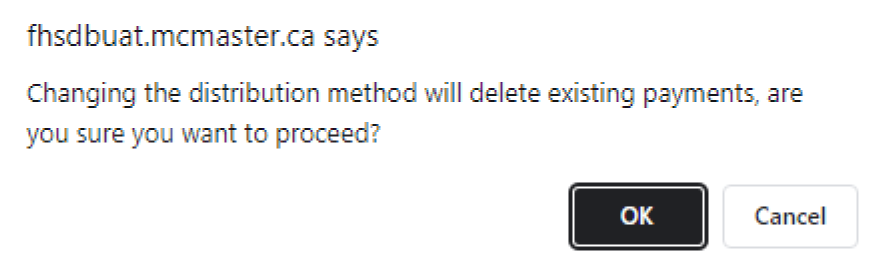
**Step 2:**

To distribute payments, you first need to select a method…

**You can distribute payments by two different units of measurements**. You can select either to distribute by % or by Units (this can be days, shifts, etc.) under the "Method" drop down.




If you select a different method of payment than the default (which is the % option), you will get the following prompt. Once you select "OK" the system will update to reflect the new method of payment and any payments you have distributed will be reset.




**Step 3:**

Once you have selected a method, you have the option of either **Auto Distribution or Manual Distribution.**

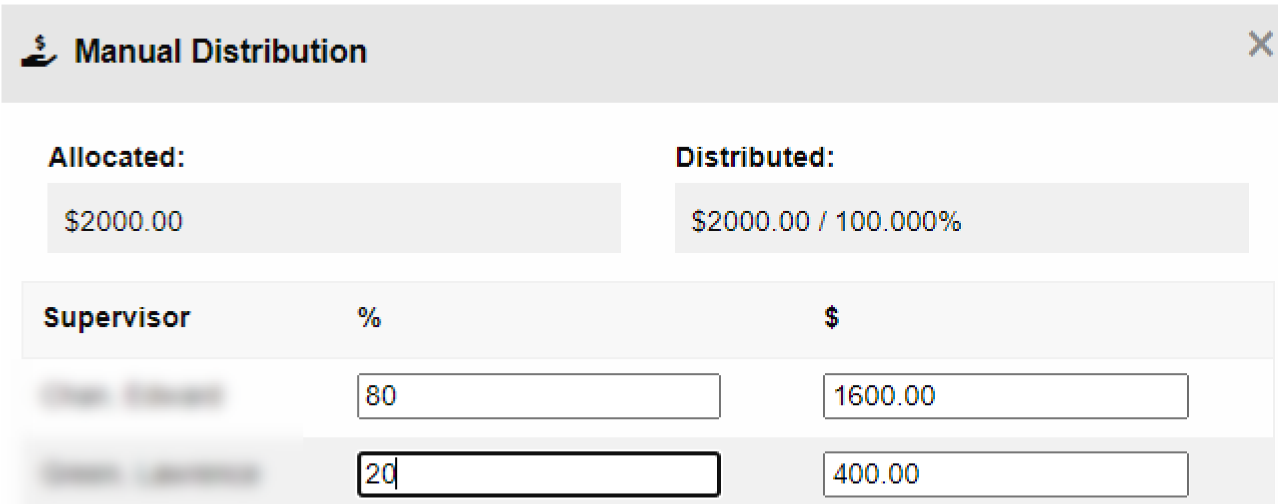
**Manual Distribution:**


Manual distribution allows you to distribute payments in varying amounts, either through percentages, dollar amounts (if you have selected the % Method), or units (if you have selected the Units Method).

**For Example:**

The % Method…

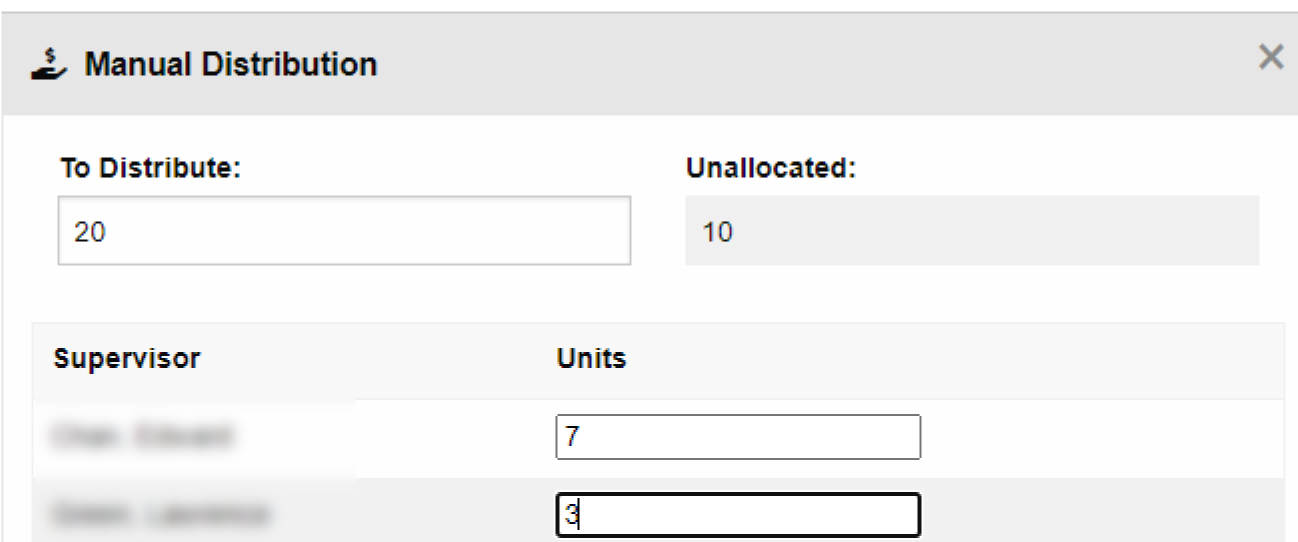
I have $2000 dollars available in funding and I want to split it between two preceptors 80/20. As soon as I enter a percentage, the corresponding amount will be generated by the system. The distribution will look like this…




**For Example:**

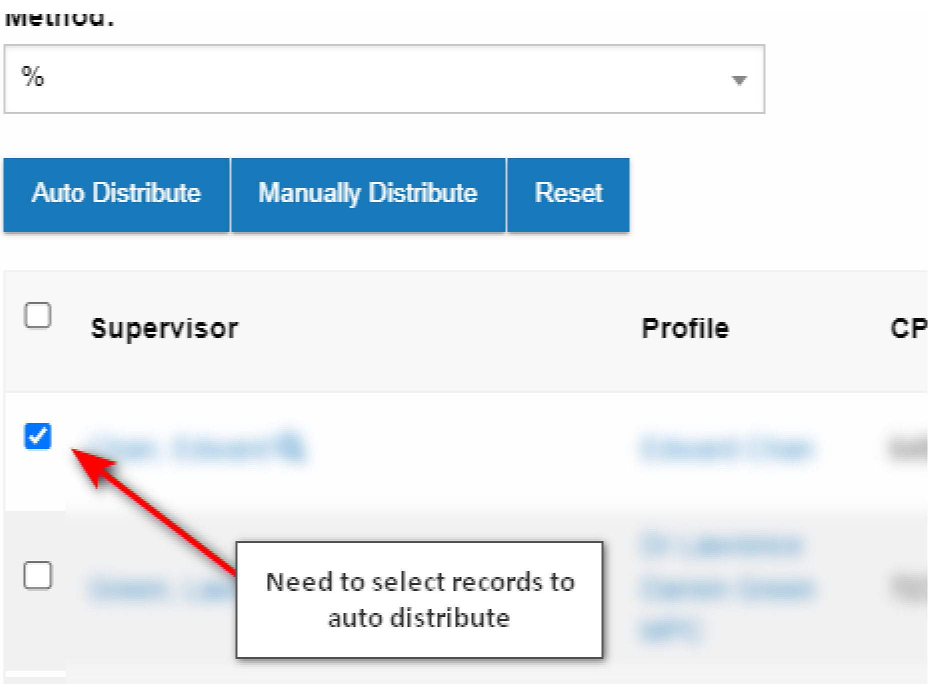
The Unit Method…

During this rotation one supervisor worked 3 half day shifts and the other worked 7 half day shifts. Although this rotation was 10 days, the supervisors were only working half the time. In order to represent half units, I will need to double the units to be distributed. The system would generate the dollar amount based on your distribution. The distribution will look like this…



## Auto Distribution:

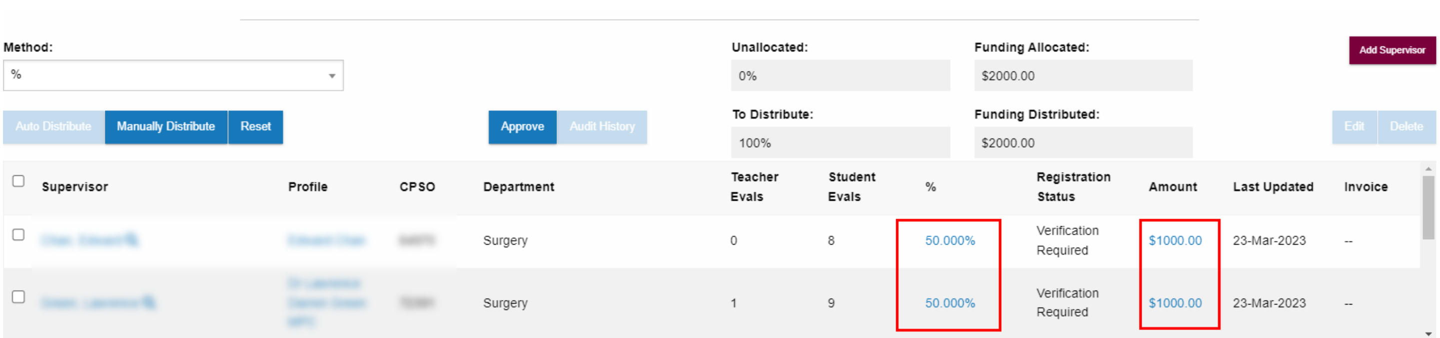

Auto distribution allows you to distribute payments in equal amounts, either through percentages, dollar amounts (if you have selected the % Method), or through units (if you have selected the Units Method). You will need to select the records you wish to auto distribute funds to.




**For Example:**

The % Method…

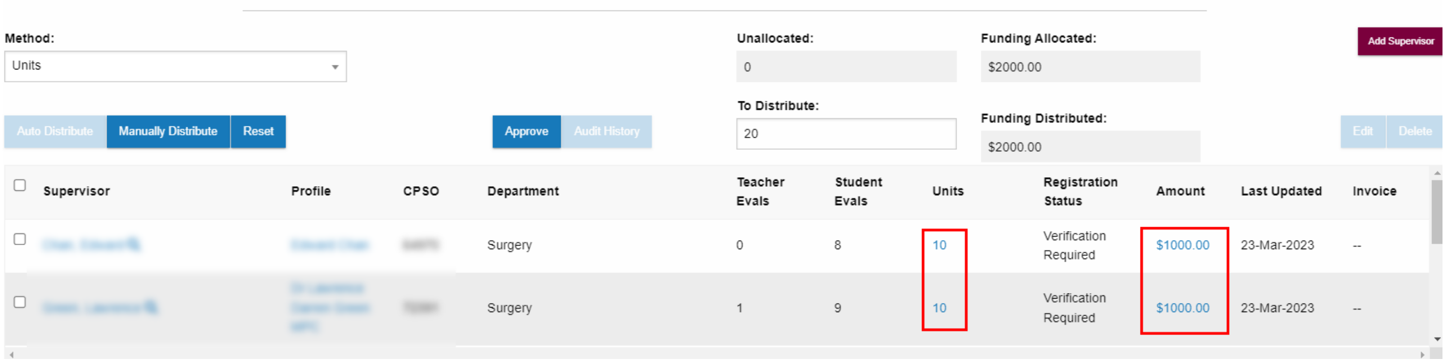
I want to distribute $2000 equally between two preceptors for this rotation. I select both preceptors and then select "Auto Distribute." Both preceptors are then automatically distributed 50% each or $1000 each. It will look like this…



**For Example:**

The Unit Method…

During this rotation there were 20 shifts in total in which 2 preceptors worked 10 shifts each. I select both preceptors and enter the amount of units, in this case shifts, I want to distribute under the “To Distribute” option. I then select both preceptors and “Auto Distribute.” It will look like this…



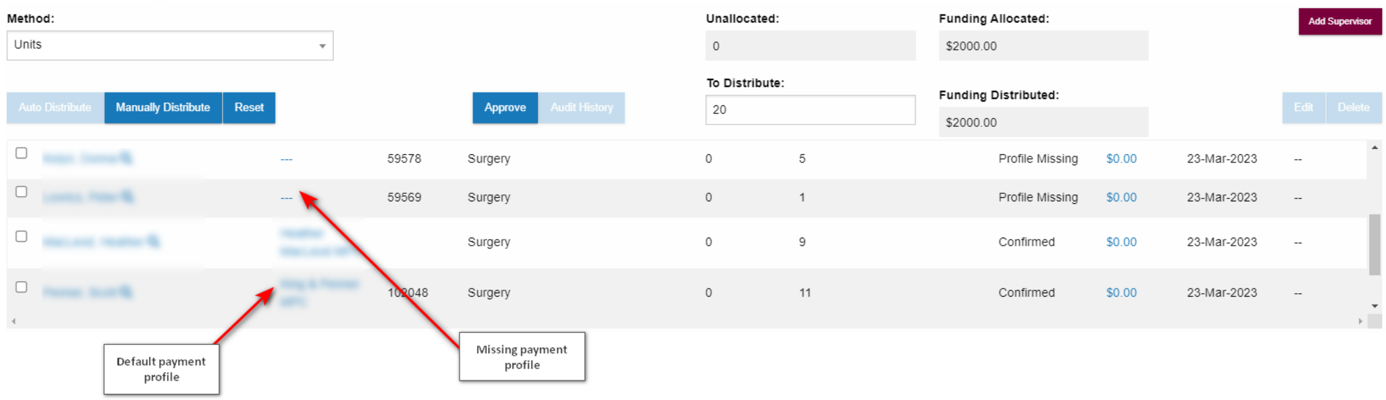

**NOTE: If applicable, you do not have to distribute the full amount generated by the system.**

## Step 4:

In addition to distributing the amounts to the supervisors based on the above instructions, **you will also need to monitor or select the payment profile that each supervisor should be paid to.**

When you select a rotation, will be able to see if the supervisor has one or more payment profiles registered in the system. The profile you originally see when you select a rotation is the “default” payment profile that the supervisor has selected during registration (or it is the only profile attached to that supervisor).

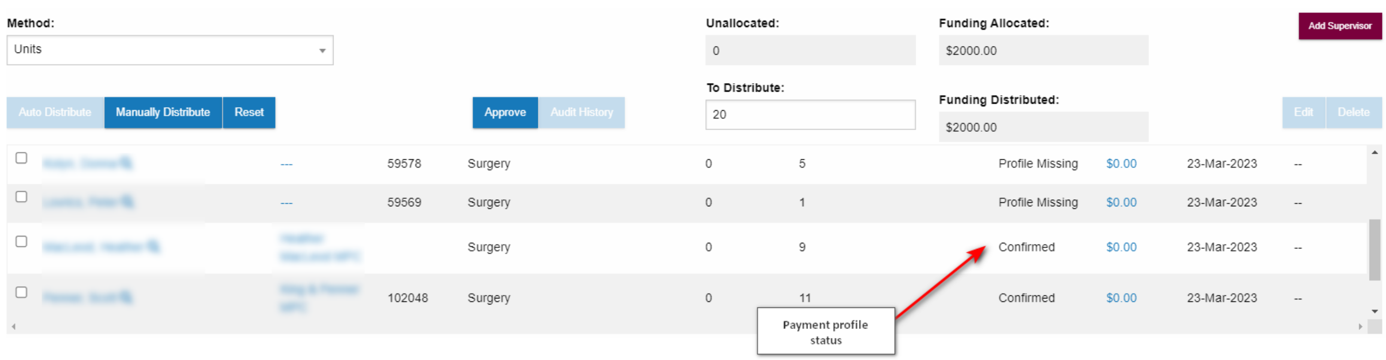
If you see “---“it means that the supervisor has not registered and is missing a payment profile.




If you want to change the profile from the default you would select the highlighted profile name, select from the profile drop down list, and save the change.

**NOTE: You can approve funds for supervisors who are missing a payment profile. The payment will be delayed until that supervisor fully registers**.

You will notice that once you distribute the funds, you will also get the registration status of the supervisor's payment profile. Each status represents where the supervisor is in the registration process.




For your reference, this is what each status means:

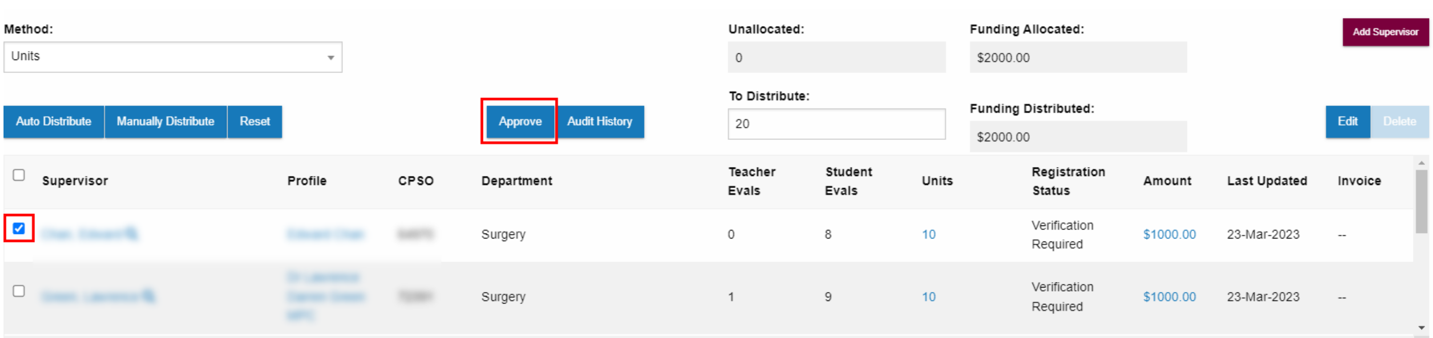
**Registration Status Legend:**

**Profile Missing** – There is no payment profile that has been registered with this supervisor. A registration email will be sent to this preceptor once they are tied to an approved payment.
**Verification Required** – Existing profile needs to be registered. Supervisor must complete the "Payment Registration" process to verify data.
**Registration Pending** – New profile has been registered and sent to Accounts Payable for verification. Status will change to "Active" once completed.

**Active** – Profile has been verified by Accounts Payable. A 1$ test payment or pre-note will be processed shortly to the account provided.
**Confirmation Pending** – A $1 test payment or pre-note has been processed to the account provided. Supervisor must confirm or decline that they received the payment.
**Prenote Rejected or Prenote Declined** – The banking information provided is incorrect and the $1 test payment or pre-note cannot be processed. Supervisor must update banking information accordingly.
**Confirmed** – The $1 test payment or pre-note has been confirmed by the supervisor. Registration is fully complete. All future payments will be made within the monthly cycle.

**Step 5:**

Once you have distributed the amount and selected the payment profiles **you will need to approve the payments**. To do this, select the preceptors you have distributed the funds to and then “Approve.”




Once you approve a payment record it will move to the status of “Approved.”

## Questions

If you have any questions or difficulties with this process, please contact us [here].