

# HOW TO CREATE AN UNLINKED PAYMENT

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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.

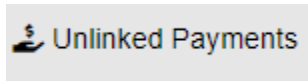
If you have any questions about how to login, refer to this user guide on our website [How to Login to FHS DB](#)

## HOW TO CREATE AN UNLINKED PAYMENT

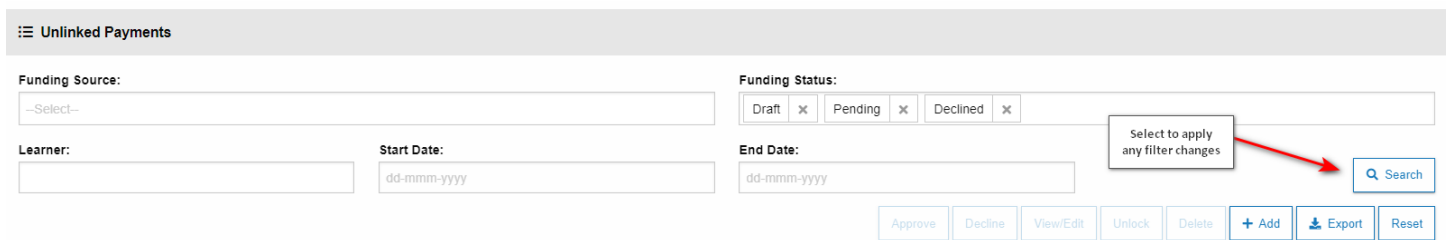
Select “Payments and Contributions” on the left-hand menu on the MedSIS homepage.



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.



The screenshot shows the 'Unlinked Payments' filter interface. It includes a header with a hamburger menu icon and the text 'Unlinked Payments'. Below the header are several filter fields: 'Funding Source' with a dropdown menu showing '-Select-'; 'Funding Status' with a dropdown menu showing 'Draft', 'Pending', and 'Declined', each with a close icon (x); 'Learner' with an empty text input field; 'Start Date' with a text input field showing 'dd-mmm-yyyy'; and 'End Date' with a text input field showing 'dd-mmm-yyyy'. A red arrow points from a callout box 'Select to apply any filter changes' to a 'Search' button with a magnifying glass icon. At the bottom of the filter area are several action buttons: 'Approve', 'Decline', 'View/Edit', 'Unlock', 'Delete', '+ Add', 'Export', and 'Reset'.

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.

**Funding Sources:** 
**Status:** 
**Start Date:** 
**End Date:**

**Correction:** 
**Learner Type:**

### 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...

**Method:** 
**Unallocated:** 100%
 **Funding Allocated:** \$2000.00

**To Distribute:** 100%
 **Funding Distributed:** \$0.00

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	%	Registration Status	Amount	Last Updated	Invoice
<input type="checkbox"/>	<a href="#">View Profile</a>	<a href="#">View Profile</a>	Surgery	0	8		Verification Required	\$0.00	20-Mar-2023	--
<input type="checkbox"/>	<a href="#">View Profile</a>	<a href="#">View Profile</a>	Surgery	1	9		Verification Required	\$0.00	20-Mar-2023	--

Supervisors who taught during this rotation  
 The supervisor's Department and CPSO number  
 Number of evaluations completed by the learner and the supervisor during this activity  
 The amount of funds eligible for distribution

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

**Method:** 
**Unallocated:** 100%
 **Funding Allocated:** \$2000.00

**To Distribute:** 100%
 **Funding Distributed:** \$0.00

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	%	Registration Status	Amount	Last Updated	Invoice
<input type="checkbox"/>	<a href="#">View Profile</a>	<a href="#">View Profile</a>	Surgery	0	8		Verification Required	\$0.00	20-Mar-2023	--
<input type="checkbox"/>	<a href="#">View Profile</a>	<a href="#">View Profile</a>	Surgery	1	9		Verification Required	\$0.00	20-Mar-2023	--

To add a missing supervisor

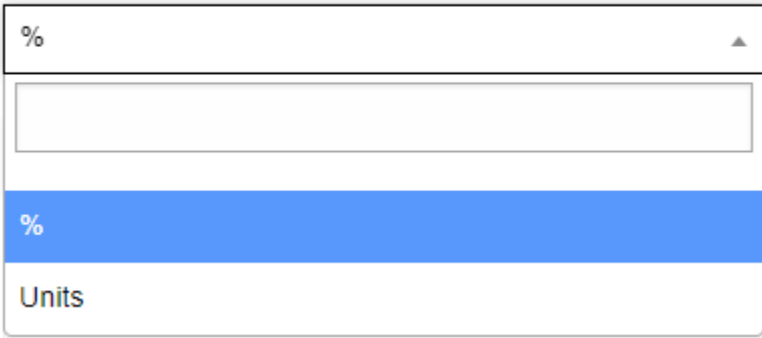
If the supervisor is not on the list, please contact [preceptor.payments@mcmaster.ca](mailto:preceptor.payments@mcmaster.ca) providing both the preceptors name, email address and CPSO (if applicable).

### 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.

Method:



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.

fhsdbuat.mcmaster.ca says

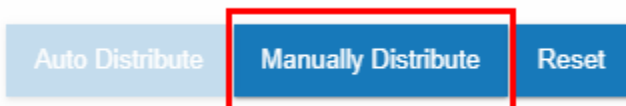
Changing the distribution method will delete existing payments, are you sure you want to proceed?



**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...

\$ **Manual Distribution** ✕

**Allocated:**

\$2000.00

**Distributed:**

\$2000.00 / 100.000%

Supervisor	%	\$
[Supervisor Name]	<input style="width: 100%;" type="text" value="80"/>	<input style="width: 100%;" type="text" value="1600.00"/>
[Supervisor Name]	<input style="width: 100%;" type="text" value="20"/>	<input style="width: 100%;" type="text" value="400.00"/>

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...

\$ **Manual Distribution** ✕

**To Distribute:**

20

**Unallocated:**

10

Supervisor	Units
[Supervisor Name]	<input style="width: 100%;" type="text" value="7"/>
[Supervisor Name]	<input style="width: 100%;" type="text" value="3"/>

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.

Method: %

<input type="checkbox"/>	Supervisor	Profile	CP
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]

Need to select records to auto distribute

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...

Method: %

Unallocated: 0%      Funding Allocated: \$2000.00     

To Distribute: 100%      Funding Distributed: \$2000.00     

<input type="checkbox"/>	Supervisor	Profile	CP	Department	Teacher Evals	Student Evals	%	Registration Status	Amount	Last Updated	Invoice
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	Surgery	0	8	50.000%	Verification Required	\$1000.00	23-Mar-2023	--
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]	Surgery	1	9	50.000%	Verification Required	\$1000.00	23-Mar-2023	--

**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...

The screenshot shows a distribution interface with the following elements:

- Method:** A dropdown menu set to "Units".
- Unallocated:** 0
- Funding Allocated:** \$2000.00
- To Distribute:** 20
- Funding Distributed:** \$2000.00
- Buttons:** "Auto Distribute", "Manually Distribute", "Reset", "Approve", "Audit History", "Add Supervisor", "Edit", "Delete".
- Table:**

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	Units	Registration Status	Amount	Last Updated	Invoice
<input type="checkbox"/>	<a href="#">View Profile</a>	1000	Surgery	0	8	10	Verification Required	\$1000.00	23-Mar-2023	--
<input type="checkbox"/>	<a href="#">View Profile</a>	1000	Surgery	1	9	10	Verification Required	\$1000.00	23-Mar-2023	--

**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.

Method: Units

Unallocated: 0      Funding Allocated: \$2000.00

To Distribute: 20      Funding Distributed: \$2000.00

Buttons: Auto Distribute, Manually Distribute, Reset, Approve, Audit History, Add Supervisor, Edit, Delete

<input type="checkbox"/>	...	59578	Surgery	0	5	Profile Missing	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...	59569	Surgery	0	1	Profile Missing	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...		Surgery	0	9	Confirmed	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...	102048	Surgery	0	11	Confirmed	\$0.00	23-Mar-2023	--

Annotations: Default payment profile (points to dropdown), Missing payment profile (points to 'Profile Missing' status)

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.

Method: Units

Unallocated: 0      Funding Allocated: \$2000.00

To Distribute: 20      Funding Distributed: \$2000.00

Buttons: Auto Distribute, Manually Distribute, Reset, Approve, Audit History, Add Supervisor, Edit, Delete

<input type="checkbox"/>	...	59578	Surgery	0	5	Profile Missing	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...	59569	Surgery	0	1	Profile Missing	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...		Surgery	0	9	Confirmed	\$0.00	23-Mar-2023	--
<input type="checkbox"/>	...	102048	Surgery	0	11	Confirmed	\$0.00	23-Mar-2023	--

Annotation: Payment profile status (points to 'Confirmed' status)

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.”

The screenshot shows the FHSDB interface for payment distribution. At the top, there are controls for 'Method' (set to 'Units'), 'Unallocated' (0), 'Funding Allocated' (\$2000.00), and 'To Distribute' (20). Below these are buttons for 'Auto Distribute', 'Manually Distribute', 'Reset', 'Approve', and 'Audit History'. The 'Approve' button is highlighted with a red box. On the right, there are 'Add Supervisor', 'Edit', and 'Delete' buttons. The main part of the screenshot is a table with the following columns: Supervisor, Profile, CPISO, Department, Teacher Evals, Student Evals, Units, Registration Status, Amount, Last Updated, and Invoice. Two rows are visible, both for the 'Surgery' department, with a registration status of 'Verification Required' and an amount of \$1000.00. The first row has 0 Teacher Evals and 8 Student Evals, while the second row has 1 Teacher Eval and 9 Student Evals. The 'Approve' button is highlighted with a red box.

Supervisor	Profile	CPISO	Department	Teacher Evals	Student Evals	Units	Registration Status	Amount	Last Updated	Invoice
<input checked="" type="checkbox"/>			Surgery	0	8	10	Verification Required	\$1000.00	23-Mar-2023	--
<input type="checkbox"/>			Surgery	1	9	10	Verification Required	\$1000.00	23-Mar-2023	--

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](#).