

HOW TO DISTRIBUTE AND APPROVE PAYMENTS

TARGET AUDIENCE: *DISTRIBUTOR*

Updated April 4, 2023

OVERVIEW

As a payment distributor, you will be distributing and approving preceptor payments that are linked to MedSIS scheduling for eligible UG and PG rotations.

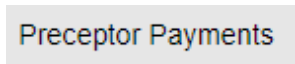
LOGIN TO FHS DB

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

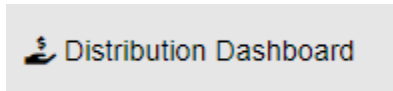
If you have any questions about how to login, refer to this user guide on our website [How to Login to FHS DB](#)

HOW TO DISTRIBUTE AND APPROVE PAYMENTS

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

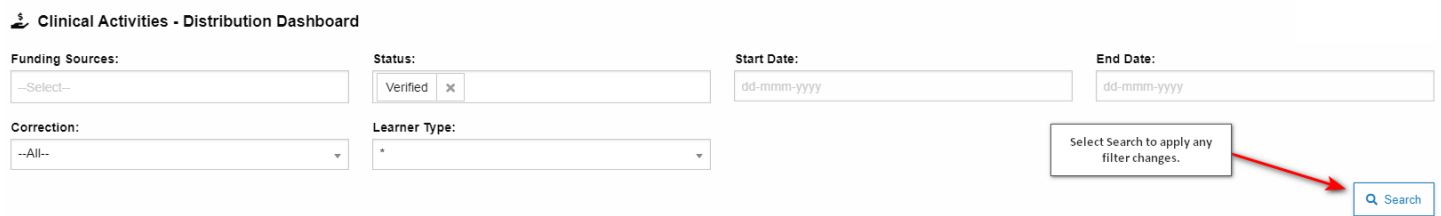


Select the “Distribution Dashboard” on the left-hand menu.

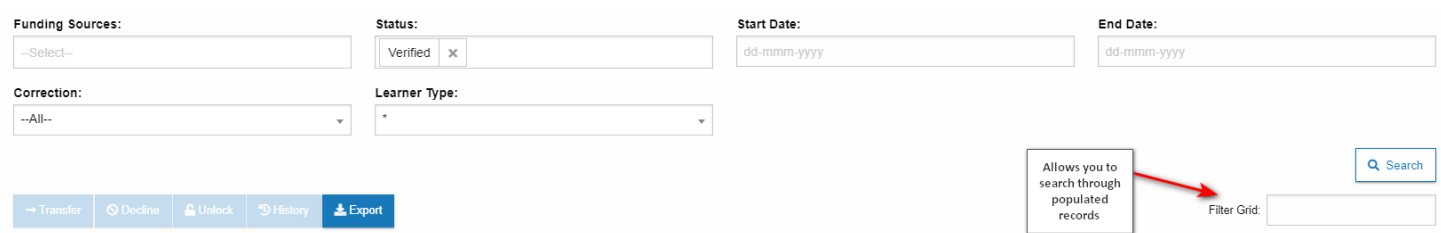


Once you select the distribution dashboard you will see all “Verified” payments that you are responsible for that are pending distribution/approval.

Your status filter will automatically be set to “Verified.” However, you have the option of filtering the dashboard by status, funding source, learner type, if the record has been corrected (updated), and date range. 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.



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...

The screenshot shows a web interface for distributing preceptor payments. At the top, there are summary statistics: Unallocated (100%), Funding Allocated (\$2000.00), To Distribute (100%), and Funding Distributed (\$0.00). Below these are buttons for 'Auto Distribute', 'Manually Distribute', 'Reset', 'Approve', and 'Audit History'. The main part of the interface is a table of supervisors. Callouts point to specific columns: 'Supervisors who taught during this rotation' points to the 'Supervisor' column; 'The supervisor's Department and CPSO number' points to the 'Department' and 'CPSO' columns; 'Number of evaluations completed by the learner and the supervisor during this activity' points to the 'Teacher Evals' and 'Student Evals' columns; and 'The amount of funds eligible for distribution' points to the 'Amount' column.

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	%	Registration Status	Amount	Last Updated	Invoice
View Profile	View Profile	12345	Surgery	0	8		Verification Required	\$0.00	20-Mar-2023	--
View Profile	View Profile	12345	Surgery	1	9		Verification Required	\$0.00	20-Mar-2023	--

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

This screenshot is similar to the previous one but highlights the 'Add Supervisor' button in the top right corner with a callout box that says 'To add a missing supervisor'.

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.

Method:

% ▲

%

Units

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?

OK

Cancel

Step 3:

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

Manual Distribution:

Auto Distribute

Manually Distribute

Reset

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 1	<input type="text" value="80"/>	<input type="text" value="1600.00"/>
Supervisor 2	<input type="text" value="20"/>	<input 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 ✕

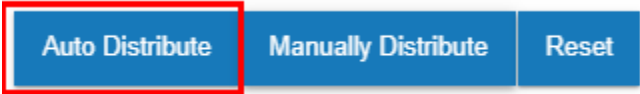
To Distribute:

Unallocated:

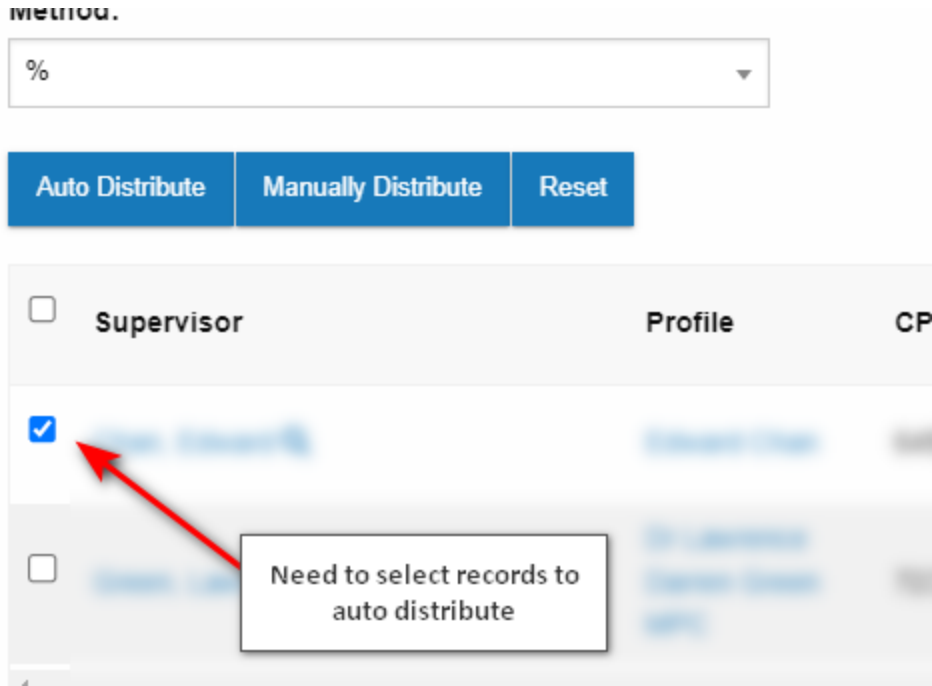
10

Supervisor	Units
Supervisor 1	<input type="text" value="7"/>
Supervisor 2	<input 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.



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		Add Supervisor	
Auto Distribute Manually Distribute Reset											To Distribute: 100%		Funding Distributed: \$2000.00		Edit Delete	
Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	%	Registration Status	Amount	Last Updated	Invoice						
<input type="checkbox"/>			Surgery	0	8	50.000%	Verification Required	\$1000.00	23-Mar-2023	--						
<input type="checkbox"/>			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...

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	Units	Registration Status	Amount	Last Updated	Invoice
<input 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	--

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.

Supervisor	Profile	CPSO	Department	Teacher Evals	Student Evals	Units	Registration Status	Amount	Last Updated	Invoice
<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	--

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.

The screenshot shows a web interface for funding distribution. At the top, there are summary boxes for 'Unallocated' (0) and 'Funding Allocated' (\$2000.00). Below these are buttons for 'Auto Distribute', 'Manually Distribute', 'Reset', 'Approve', and 'Audit History'. A 'To Distribute' input field is set to 20, and 'Funding Distributed' is \$2000.00. A table lists supervisors with columns for checkboxes, names, IDs, departments, unallocated amounts, total units, registration status, funding amount, dates, and actions. A red arrow points to the 'Confirmed' status of a supervisor with ID 102048.

Method	Unallocated	Funding Allocated	To Distribute	Funding Distributed
Units	0	\$2000.00	20	\$2000.00

Profile	Units	Department	Unallocated	Total	Status	Funding	Date	Action
Profile Missing	59578	Surgery	0	5	Profile Missing	\$0.00	23-Mar-2023	--
Profile Missing	59569	Surgery	0	1	Profile Missing	\$0.00	23-Mar-2023	--
Confirmed		Surgery	0	9	Confirmed	\$0.00	23-Mar-2023	--
Confirmed	102048	Surgery	0	11	Confirmed	\$0.00	23-Mar-2023	--

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.

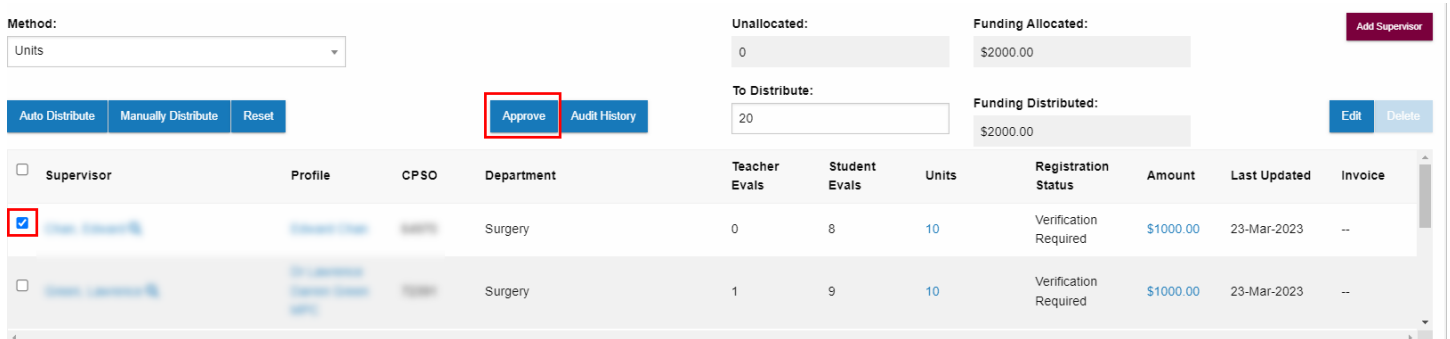
Confirmation Pending – A \$1 test payment or pre-note has been processed to the account provided. Supervisor must confirm or decline that they received the payment.

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 a web interface for managing funds. At the top, there are summary statistics: 'Unallocated: 0', 'Funding Allocated: \$2000.00', 'To Distribute: 20', and 'Funding Distributed: \$2000.00'. Below these are buttons for 'Auto Distribute', 'Manually Distribute', 'Reset', 'Approve', and 'Audit History'. The 'Approve' button is highlighted with a red box. Below the buttons is a table with the following columns: Supervisor, Profile, CPSO, Department, Teacher Evals, Student Evals, Units, Registration Status, Amount, Last Updated, and Invoice. Two rows are visible in the table, both for the 'Surgery' department. The first row has 0 Teacher Evals and 8 Student Evals, with a registration status of 'Verification Required'. The second row has 1 Teacher Eval and 9 Student Evals, also with a registration status of 'Verification Required'. A checkbox in the 'Supervisor' column of the first row is checked and highlighted with a red box.

Supervisor	Profile	CPSO	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.”

NEED SUPPORT?

Please log a service ticket [here](#). All FHS DB User Guides can be found on the [FHS DB website](#)