

# How to Create a Distribution Payment List

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Target Audience: Distributors

Updated *January 28, 2020*

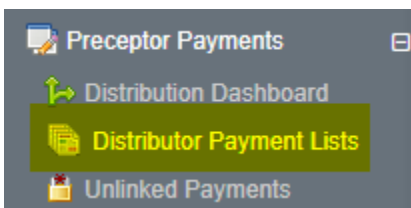
## DISTRIBUTION LISTS

There will be instances in which you find that you are distributing payments to the same group of supervisors repeatedly for clinical teaching activities. As a result, you have the ability to create a pre-generated distribution lists that can be applied to a record/rotation for payment.

### HOW TO CREATE A DISTRIBUTION PAYMENT LIST

#### Step 1: Create the List

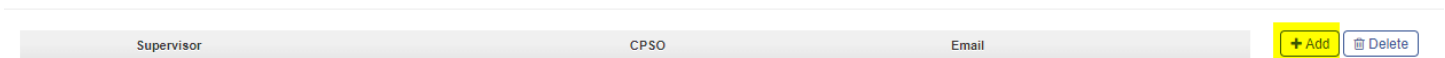
Under “Preceptor Payments” select “Distribution Payment Lists.”



Select “Add”



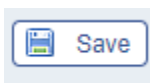
From there you can create a list of preceptors that can be applied to records/rotations for payment. If you cannot find the name of supervisor in the search function, please reach out to [preceptor.payments@mcmaster.ca](mailto:preceptor.payments@mcmaster.ca). Please provide the preceptors name and email address so they can be added to the list.



You can also name the group for future use.

Distribution List Name:

Once you have added the associated preceptors and named the group, please remember to “Save” it.



### Step 2: Add your List to a Payment

To apply a distribution list to a rotation/record for payment, you will select the record and then “Manually Distribute.”

The screenshot shows a web interface with a table of supervisors. At the top, there are buttons for 'Auto Distribute', 'Manually Distribute', and 'Reset'. To the right, it shows 'Unallocated: 100%', 'Funding Allocated: \$500.00', and 'To Distribute: 100%'. The table has columns for Supervisor, Profile, CPSO, Department, Teacher Evals, Student Evals, %, Registration Status, Amount, Last Updated, and Invoice.

Select the payment list from the drop down and then “Merge.”

The screenshot shows a 'Merge' dialog box. At the top, there is a 'Payment List' dropdown menu and a 'Merge' button. Below the dropdown, it says 'Allocated: \$' and 'Distributed: \$0.00 / 0%'. There is a 'Supervisor' label and a text input field containing '0.00'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Once you merge your list, you can then distribute payments manually to the different supervisors on the list.

Payment List:  Merge

Allocated: **\$500.00** Distributed: **\$0.00 / 0%**

Supervisor	%	\$
<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

**NOTE: A distribution list is NOT the same as a group payment profile. Group payment profiles are used to funnel multiple preceptor’s payments into one fund. The distribution list should be used if you are paying the same group of individual preceptors for different rotations/records multiple times.**

## QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at [preceptor.payments@mcmaster.ca](mailto:preceptor.payments@mcmaster.ca).