How to Generate a Report (Distribution Dashboard)

Target Audience: Distributors

Updated *February 13, 2020*

Reporting

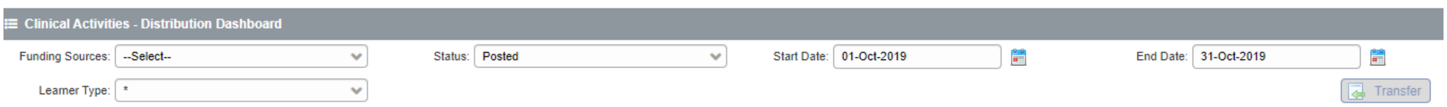
If you need to generate a report on all preceptor payment records that are mapped to you, you have the option of generating an excel file through the distribution dashboard. This report can also provide an overview of the preceptor payments you have approved, since you cannot filter the distribution dashboard by preceptor.

How to Generate a Report

To generate a report through the distribution dashboard, use the filters at the top of the page based on your desired parameters.

For example…

If you are looking for a report that captures rotations in October 2019 that you have approved and have been posted, you would filter your report like so:



Once you have adjusted the filters based on the specifications of your report, you will select "Search," then "Export" and download the excel.

From there, you can filter the report using Excel settings. The report will provide multiple lines for one rotation/learner if more than one preceptor was paid for that particular rotation.

Legend Status Reminder

The report will also let you know the status of the payment and the status of the preceptor's registration. If you are unsure of what the status means, please refer below.

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.

Payment Status Legend:

Verified – The rotation and associated payments have been verified by your associated verifier and are waiting for your distribution/approval.
Declined – You have declined a payment because the rotation information or amount is incorrect.
Approved – You have distributed and approved the payment.
Invoiced – An invoice has been generated for this payment and is waiting to be "Posted."
Posted – The payment has been processed by McMaster Accounts Payable and will be deposited into the preceptors account.
Expired – A pending clinical activity has expired

QUESTIONS?

If you have any questions or difficulties with this process, please contact Preceptor Payments at preceptor.payments@mcmaster.ca.