



How to Transfer a Payment

Target Audience: Distributors

Updated February 13, 2020





TRANSFERRING PAYMENTS

If you see a rotation on your distribution dashboard that you know belongs to another distributor, you have the option of transferring the record. This often occurs when there are multiple distributors for one region and funding source.

HOW TO TRANSFER PAYMENTS

To transfer a payment in the distribution dashboard you will select the rotation and then select "Transfer." You can only transfer "Verified" payments.



Once you select "Transfer," you will have to select the appropriate administrator from the drop down list.

Transfer Ownership		×		
Transfer To:	Q Search	*		
Rotation Program 🗘 Rot			#Wks <	> Fui
Family Medicine Far			16	FM
Family Medicine Far	Contractor Contractor	•	4	FM

Once you transfer a record it will disappear off your dashboard.

NOTE: Please do not transfer records unless you know they do not belong to you and you know who the appropriate distributor is.





HOW TO RETRIEVE A TRANSFERRED PAYMENT

To retrieve a transferred payment that was transferred in error, you will need to reach out to the distributor you transferred the payment to and ask them to "Decline" the record.

		Q Search	Export
Transfer	😢 Decline	G Unlock	🚱 History
🗘 🛛 Last Update 🔹	Amount 🗘 % 🖒	Distributed 🔷	Posted 🖒

HOW TO KNOW IF A PAYMENT WAS TRANSFERRED TO YOU

You are able to see which payments were transferred to you by looking at the "Status" column on the distribution dashboard. The status will read "Verified (Transferred)."

Funding Sou	rces:Select		~	Status: Verified		~	Start Date:	dd-mmm-yyyy				End Date: dd-mm	іт-уууу			Q Search	👱 Export
Learner 1	ype: *		~											🛃 Transfer	🔞 Decline	C Unlock	🖲 History
Learner 🔺	Base Location	Year/Level 🖒	Learner Program	Rotation Program	Rotation	Specialty	Туре	Location 🖒	Start 🔿	End 🔇	#Wks 🔿	Funding Source 🖒	Status 🔇	Last Update 🔅	Amount 🔷 % 🤇	Distributed	Posted 🖒
	Cardina Pages				Concession and		-	-				-	Verified (Transferred)				****

HOW TO SEE WHO TRANSFERRED YOU A PAYMENT

If you want to know who transferred a payment to you, you would select the record and then select "History." This will give you a full audit history of the record.

Funding Sou	rces:Select		~	Status: Verified		~	Start Date:	dd-mmm-yyyy				End Date: dd-mn	ım-уууу				Q Search	👱 Export	ן
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State State	Taxable Report	-	Contraction (Contraction)	Contrary.			-	-				-				-		-	

QUESTIONS?

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