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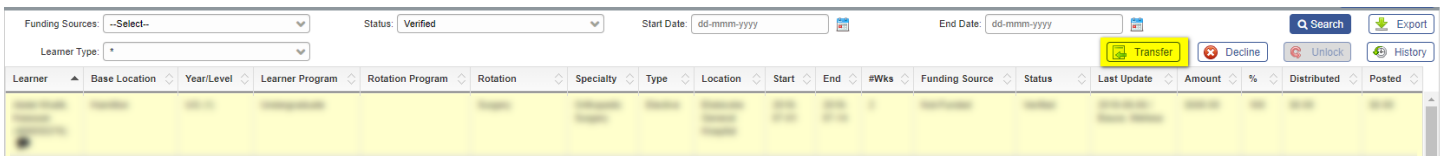
Once you select "Transfer," you will have to select the appropriate administrator from the drop down list.
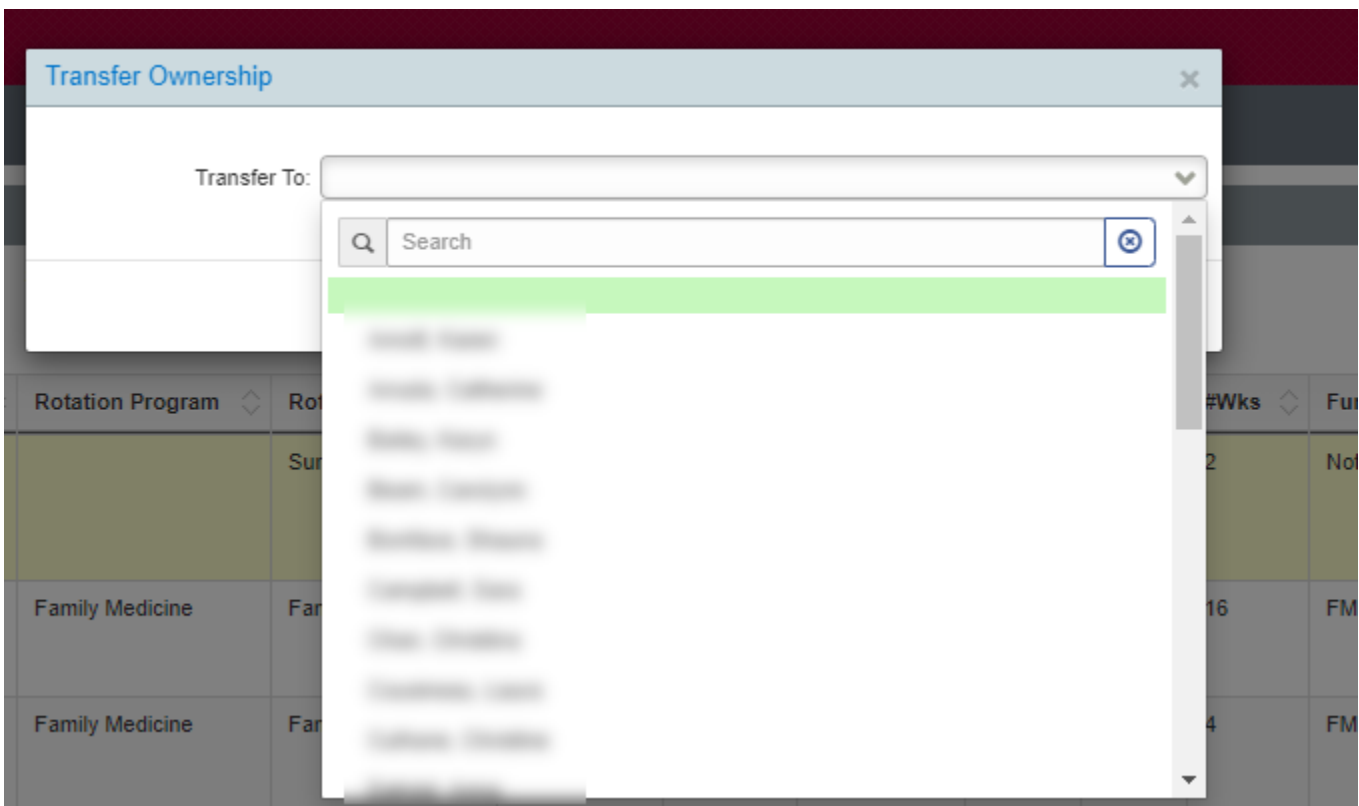

Once you transfer a record it will disappear off your dashboard.

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.
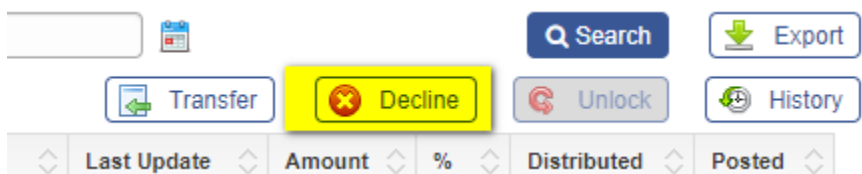

HOW TO KNOW IF A PAYMENT WAS TRANSFERRED TO YOU

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)."
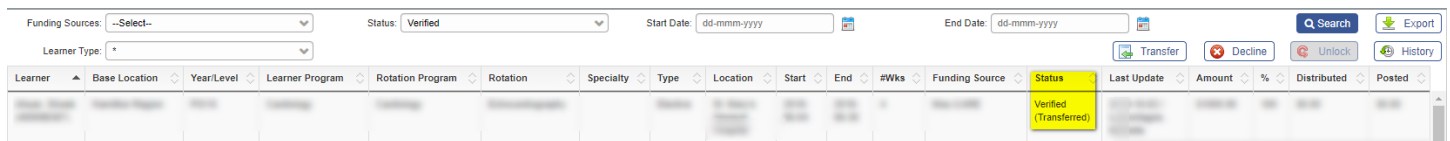
HOW TO SEE WHO TRANSFERRED YOU A PAYMENT

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.
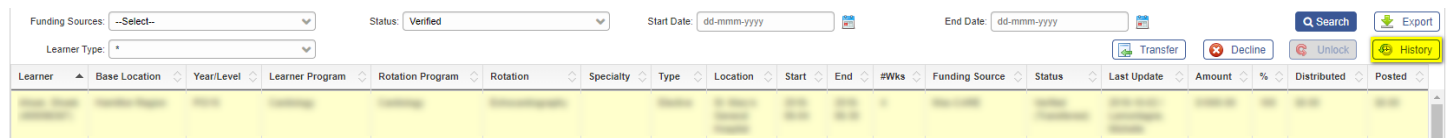
QUESTIONS?

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