



How to Unlock and Reset a Payment

Target Audience: Distributors

Updated February 13, 2020





UNLOCKING PAYMENTS

If you make a mistake and approve a record by accident, you can unlock the approved record and bring it back to the status of "Verified."

HOW TO UNLOCK PAYMENTS

In the distribution dashboard, you will need to filter on the status of "Approved," select the record you want to unlock and then select "Unlock." You can only unlock records that are "Approved."

🖽 Clinical A	ctivities - Distributi	on Dashboard															sh	ow unassigned
Funding Sou	irces:Select		~	Status: Approved		~	Start Date:	dd-mmm-yyyy				End Date: dd-mm	т-уууу				Q Search	👱 Export
Learner	Туре: *		~											👍 Transfer	🔞 Dec	line	C Unlock	History
Learner 🔺	Base Location 🖒	Year/Level 🗘	Learner Program 🖒	Rotation Program	Rotation	Specialty	🔿 Туре 🖒	Location 🖒	Start 🗘	End 🗘	#Wks 🔅	Funding Source \diamondsuit	Status 🗘	Last Update 🖒	Amount 🗘	% 🗘	Distributed 🖒	Posted 🖒
1	Resident .	-	Tang Balans Rangin	August Balance and Refer	ines in Response		-			Ξ.	*	-		Anna Ages		-		

Resetting Payments

If you make a mistake and distribute the wrong amount to a preceptor, you can reset the distribution and start over, i.e. the amount distributed will go back to \$0.

HOW TO RESET PAYMENTS

In the distribution dashboard, you will select the associated rotation. The preceptor information will appear at the bottom of the screen. You will select "Reset" and the amount distributed will go to \$0 for each supervisor.

Method: %	~	Unallocated: 100%	Funding Allocated: \$500.00	
Auto Distribute Manually Distribute Reset	Approve Audit History	To Distribute: 100%	Funding Distributed: \$0.00	Add Supervisor Edit Delete

NOTE: You can only reset the distribution of payments if the status of the payment is "Verified."

QUESTIONS?

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