

# How to Navigate the Payment Dashboard

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Target Audience: Supervisors

Updated *August 24, 2023*

## PAYMENT DASHBOARD BACKGROUND

The Payment Dashboard in MedSIS will allow you to see past, current, and upcoming eligible preceptor payments. Each payment will have a corresponding status. Please refer below for the status legend:

**Scheduled** - This payment has been approved and is scheduled to be processed with the next pay cycle. Pay cycles run monthly.

**Posted** - This payment has been posted through payroll on the date indicated and should be paid to you through electronic funds transfer (EFT) within 3 business days.

**Registration Required** - This payment has been approved, but cannot be processed until the Payment Registration process has been completed and a payment profile has been created and then validated by Accounts Payable.

**Registration Pending** - This payment has been approved, but the registration process is pending verification by Accounts Payable.

**Verification Required** - The payment has been approved, however the payment registration information is over a year old and must be completed again in order to validate all payment information.

**NOTE: Clinical teaching rotations must end and be stabilized (45 days after the rotation has ended) in order for the associated preceptor payment to be processed. If you do not see a payment on your dashboard, please make sure the activity has ended and 45 days have passed since the end date.**

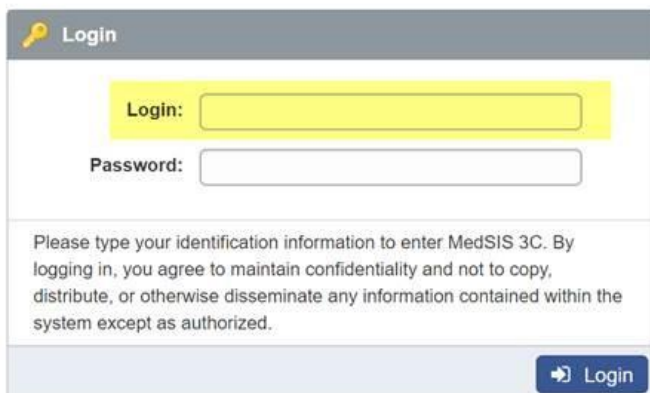
## HOW TO VIEW PAYMENTS

### Step 1:

Login to MedSIS (<https://medsis.mcmaster.ca>) with the same email address and password you used to login for registration. If you cannot remember your password for your email login, please select the “Forgot your Password” option and you will be able to reset your login credentials.



MacID Login form with a 'MacID Login' button.

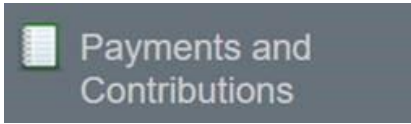


Standard Login form with 'Login' and 'Password' fields and a 'Login' button.

- Forgot your password?
- Do you need login help?
- Contact MedSIS 3C Help Desk

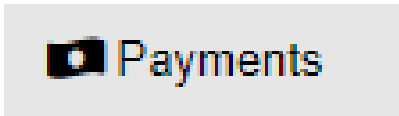
**Step 2:**

Once you have logged into MedSIS, you will see the option (on the left-hand side menu) called ‘Payments and Contributions.’ Once you select this option, you will be re-directed to the payment module.



**Step 3:**

Once in the payment module, you will see the option (on the left-hand side menu) called ‘Payments.’ Once you select this option, you will be re-directed to the payment dashboard.



**Step 4:**

In the payment dashboard, you will see a table that will detail each past, current, or pending payment associated with your payment profile(s). If the payment has been posted, you will also be able to generate an invoice that breaks down your preceptor payments.

The screenshot shows the 'Payment Dashboard' interface. At the top, there are several filter fields: Supervisor, Invoice, Start Date (dd-mmm-yyyy), Profile, End Date (dd-mmm-yyyy), Funding Source(s), Payment Status, and Payment Type. A yellow note states: "\*\*NOTE: A clinical teaching rotation must end before an associated preceptor payment can be processed." Below the filters are buttons for 'Reset', 'Search', and 'Export', along with a 'Filter' input field. The main area contains a table with the following columns: Supervisor, Funding Src., Profile, Activity Type, Learner/Lvl, Location, Date Range, Submitted By, Approved Date, Amount, Status, File, and Invoice. The table lists several payment entries. A red arrow points to the 'Invoice' hyperlink in the 'Invoice' column of the second row. A callout box next to the arrow says: "Select the invoice hyperlink to view payment details."

If you are looking for a specific payment, you can filter your dashboard by using the filters at the top of the table. After you adjust your filters, remember to select “search” to apply the filters.

**Payment Dashboard**

Supervisor:  Start Date:  End Date:  Payment Status:

Invoice:  Profile:  Funding Source(s):  Payment Type:

**\*\*NOTE: A clinical teaching rotation must end before an associated preceptor payment can be processed.**

Total:

[Reset](#) [Search](#) [Export](#)

**NOTE: If you have questions regarding specific payments, please refer to the “Submitted By” column for the appropriate administrator.**

## TYPES OF PAYMENTS

There are two types of payments in the payment dashboard: Clinical and Unlinked.

**Clinical Payments** – Based on clinical scheduling information stored in MedSIS.

**Unlinked Payments** - Payments for other activities that are not attached to the clinical schedule in MedSIS.

You will be able to distinguish the type of payment by looking under “Activity Type” in your table.

Activity Type

Clinical

Unlinked


If you want to see more details on an Unlinked payment, please select the hyperlinked comment box next to “Unlinked.” There may also be attached documents with unlinked payments. This would appear under the “File” column.

File

## NEGATIVE BALANCES

If you were paid in error for either clinical or unlinked activities, your account will have a negative balance. The negative balance will be deducted from future preceptor payments until your balance reaches a positive amount. Once your balance reaches a positive amount, you will be issued an invoice that will include all transactional details.

If you want to see more details on a negative balance, please select the hyperlinked comment box next to “Unlinked.” There may also be attached documents with negative balances. This would appear under the “File” column.

Supervisor	Funding Src.	Profile	Activity Type	LeameriLvl	Location	Date Range	Submitted By	Approved Date	Amount	Status	File	Invoice
			Unlinked						\$-1000.00			--

**NOTE: If you have questions regarding negative balances, please refer to the “Submitted By” column for the appropriate administrator.**

### GENERATING A PAYMENT REPORT

If you want to generate an excel report of your payment dashboard information, select the applicable search parameters using the filters at the top of the table, and then select “export.”



### QUESTIONS?

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