

# **BURRELL COLLEGE OF OSTEOPATHIC MEDICINE**

## **STANDARD OPERATING PROCEDURES**

<b>OCE – Preceptors: Preceptor Payments</b>		<b>SOP #: CE.004.02</b>
Effective Date	07/01/18	
Last Revision/Review	11/29/18, 8/28/19, 10/21/22, 05/22/23	

### **1. Purpose**

The purpose of this procedure is to provide guidelines to the OCE Staff for Internal process for paying the Preceptors.

### **2. Related Policy/Authority**

### **3. Faculty/Staff Responsibilities**

RAC Coordinators Director of

Clinical Education

Administrative Assistant

Finance Office

### **4. Definitions/Abbreviations**

- A. OCE – The Office of Clinical Education
- B. CAPRI – Clinical and Professional Resource Information System
- C. NI – New Innovations
- D. eR – eRequester → Accounting System

### **5. Procedural Steps**

5.1. The trigger for preceptor payment is the evaluation completed and submitted by the preceptor in NI.

The Director of Clinical Education or designee:

5.1.1. Makes sure that the payment/vendor paperwork is completed, vendor is created in GP, vendor is assigned to the preceptor in CAPRI, and the preceptor payment can be processed.

5.1.1.a. The required payment paperwork includes Burrell COM Vendor Form, W9, Payment Agreement.

5.1.2. The Director of Clinical education or the designee downloads the csv report ""eRFequester Purchase Request"" from SSRS reports, reviews and makes sure the information is accurate. Saves the csv file in the shared drive ""Clerkship Requests"" and notifies the finance office that the file is ready for upload into eRequester.

5.1.3. Once the file is uploaded in eRequester, it comes to the Director of Clinical Education for approval. Once approved, the invoices may be generated.

5.1.4. If the vendor information is not up to date, the individual invoices will be processed manually. The director of Clinical education submits the manual invoices to the Administrative Assistant to enter/upload into ""eR"";

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5.1.5. Approves the purchase requisition in eR;

5.2. The system emails copies of generated invoices to the Finance Office for further processing of payment.

### **6. Reports/Charts/Forms/Attachments/Cross References**

[CAPRI](#)

[W9](#)

### **7. Maintenance**

The OCE will review this procedure as necessary.

### **8. Signature**

Approved by	6.2.2023
Director of Clinical Education	Date

### **9. Distribution List**

Internal

### **10. Revision History**

Revision Date	Subsection #	Summary of Changes	New/Cancellation/ Replacement Procedure? (if applicable)	Approval Date
10.21.2022	5	"GP" updated with "eRequester"		10.21.22
05.22.2023	4 & 5	Updated the procedural steps to reflect the automation process		6.2.2023