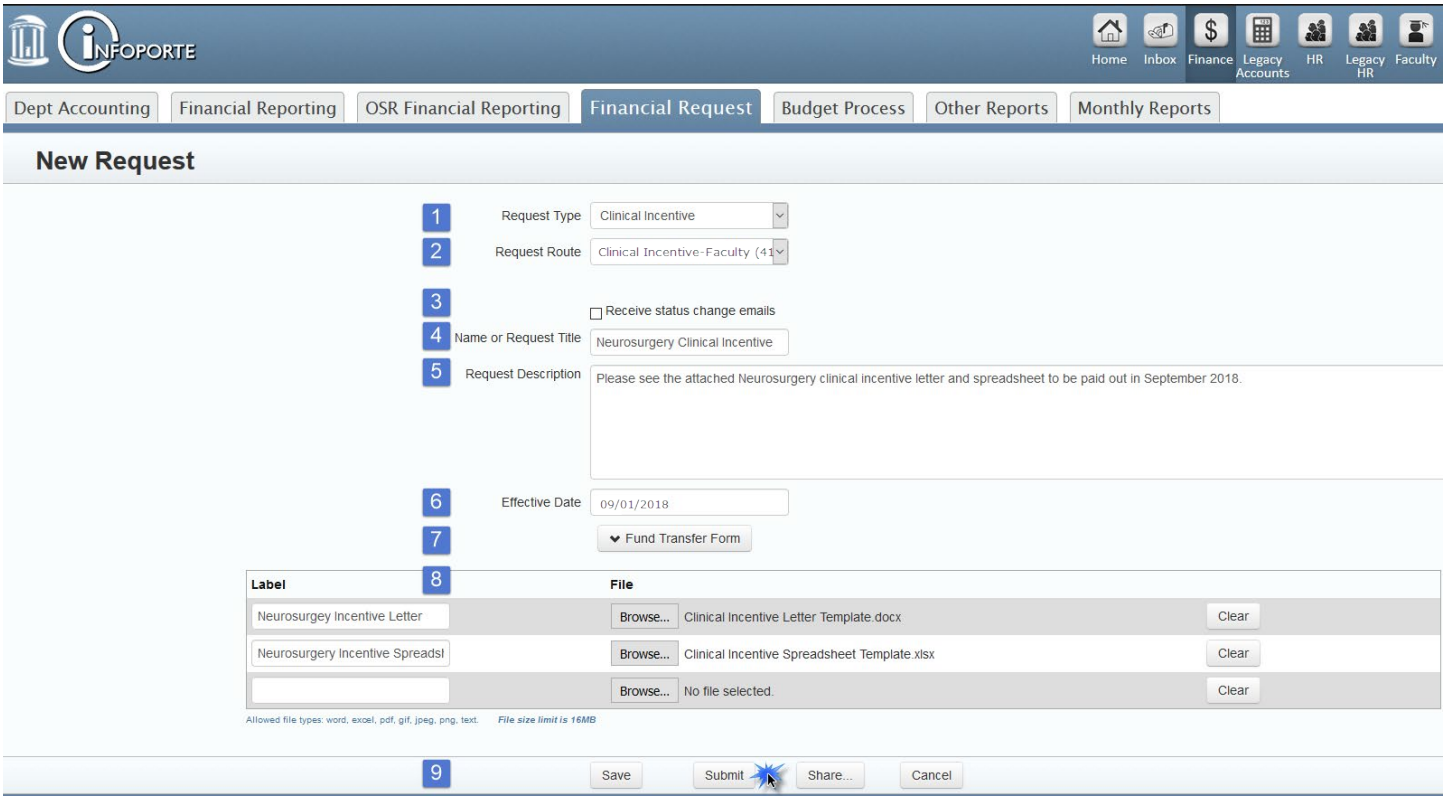
Routing Clinical Incentive Requests in Infoporte

Financial Request Tab

Navigate to *Infoporte > Finance > Financial Request > New Request*. Complete the following steps. If you do not have access to this navigation, please contact Lauren Gardner (lauren_gardner@med.unc.edu), and Cc your ACA.



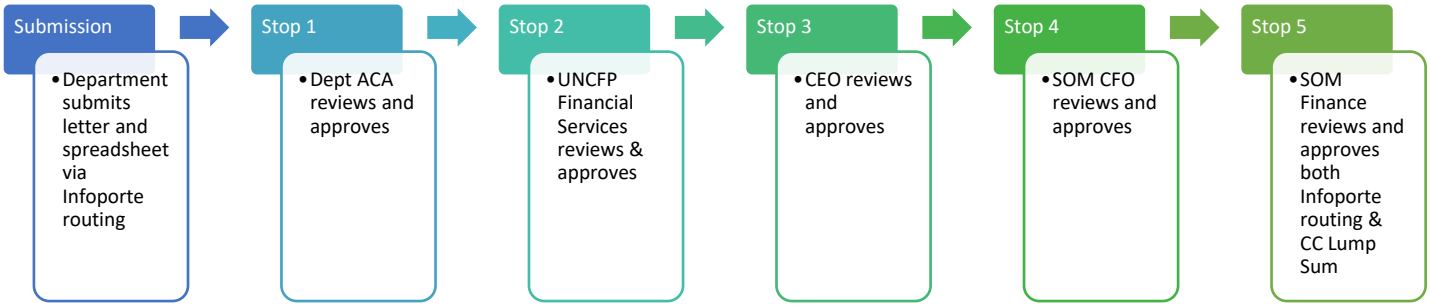
1. **Request Type**: select "Clinical Incentive"
2. **Request Route**: select the route associated with your department and whether or not it's for a Faculty letter
3. **Receive Status Change Emails**: select this box if you'd like to be notified each time the route is updated
4. **Name or Request Title**: input the name of the request title (i.e. Neurosurgery Clinical Incentive)
5. **Request Description**: input a short description of the request (i.e. Neurosurgery clinical incentive letter and spreadsheet to be paid out in September 2018).
6. **Effective Date**: input the effective date of the ConnectCarolina ePAR Lump Sum action
7. **Fund Transfer Form**: not used in this process
8. **File Upload**: upload the template letter and template spreadsheet
   - **Label**: name your document
   - **Choose File:** select the templates from a saved folder on your computer
   - **Clear**: if the wrong document was uploaded, click "Clear" to remove the file

   Please note, if you have multiple documents to upload an additional row will appear once a file has been added.
9. **Submit**: click the submit button to route the request

Routing

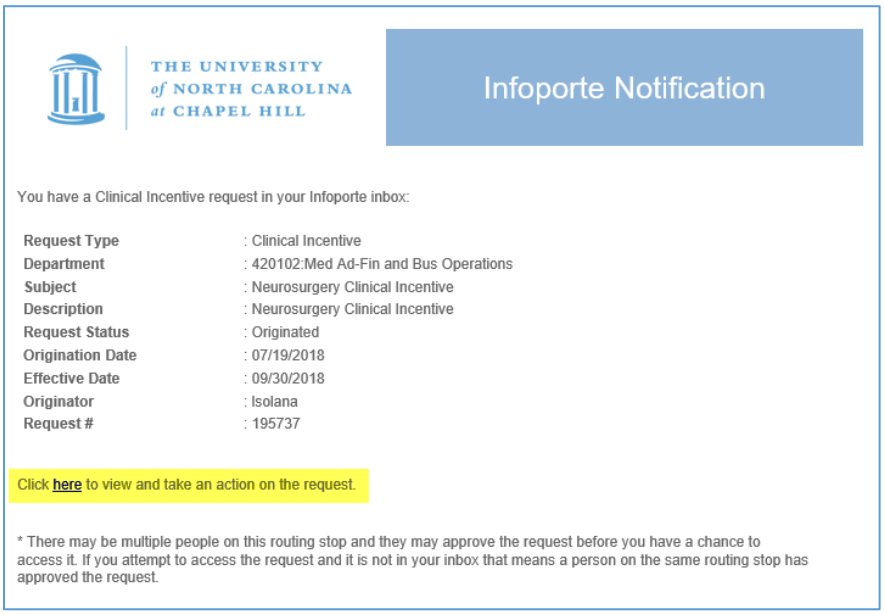
There are two route types setup for your Department at the Admin Department Level:

1. **Clinical Incentive – Faculty**



Understanding Route/Approval Options in Infoporte

Once a request is submitted and arrives in your Infoporte Inbox you will receive an email notification letting you know there's a request awaiting your approval. You will be able to access the request via the link in the email notification OR by clicking on your Infoporte Inbox tab.



THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL

Infoporte Notification

You have a Clinical Incentive request in your Infoporte inbox:

Request Type	: Clinical Incentive
Department	: 420102:Med Ad-Fin and Bus Operations
Subject	: Neurosurgery Clinical Incentive
Description	: Neurosurgery Clinical Incentive
Request Status	: Originated
Origination Date	: 07/19/2018
Effective Date	: 09/30/2018
Originator	: Isolana
Request #	: 195737

Click here to view and take an action on the request.

* There may be multiple people on this routing stop and they may approve the request before you have a chance to access it. If you attempt to access the request and it is not in your inbox that means a person on the same routing stop has approved the request.

Once within the request you will have a few options as the approver. Please note, if there are several individuals listed at your stop only one person has to approve. Once the request is approved at your stop it will be removed from your Infoporte Inbox.

Below are the action options that may be available to you and to others at your stop while the request is in your Inbox.

1. **Save**: Allows you to enter comments in the request and then save them so that the submitter and future approval stops can see the comments. You can also attach additional documents to the route to be included in the request. This does not remove the request from your Inbox, and it does not notify others that a comment has been made.
2. **Approve**: Allows you to approve the request at your stop. You can choose to enter comments or add attachments before clicking approve, and this will add a note to the route for all other approvers to see. Once approved by one person at your stop, the request will be removed from your Inbox.
3. **Disapprove**: Allows you to disapprove the request and will send the request back to the initiator. Enter a comment explaining reasons for disapproval by entering in a comment BEFORE disapproving.
4. **Notify**: Sends an email to all previous stops along the route, but does not send a notification to the submitter. The status of the request will change to "notified" until it is approved at this stop. The request will remain in your Infoporte Inbox. Please be sure to enter a comment before clicking the "Notify" button.
5. **Share**
    - "**FYI**" **Checkbox**: the recipient will receive the contract in their Infoporte Inbox, but will not receive an email. The recipient cannot add a note or modify the request in any way. This is a "view only" share.
    - "**Send request share or FYI email**" **Checkbox**: The recipient will receive an FYI email and can add comments to the request, but will not be able to approve the request. The request is removed from the recipient's Infoporte Inbox once they respond.
6. **Delete**: This action is only available to the submitter, and will not be available after the request is marked by SOM Finance as "Complete". This will remove the request from the route and delete it from the system.
7. **Retract**: This action is only available to the submitter. Retraction removes the request from the route, but will NOT delete the request in Infoporte.
8. **Complete**: This action option is reserved for SOM Finance as the last stop along the route. Once SOM Finance clicks the "Complete" button, the submitter will receive an email notification letting them know the request has been fully approved. It will also indicate to the submitter that the Lump Sum action(s) in ConnectCarolina have been approved.