Clinical Incentive Letter Process

7/19/18
Infoporte Process – Faculty Members

SOM Department submits Clinical Incentive request
• Submit letter template signed by Department Chair*
• Submit Excel template*

Stop 1: Department
• Department ACA/Business Manager approves via Infoporte route

Stop 2: UNCFP Financial Services
• UNCFP Financial Services reviews letter and spreadsheet
• Approves upon review

Stop 3: CEO
• Review by Mauro and/or Ewend
• Approves upon review

Stop 4: SOM
• Review by Sledge and/or Oliver
• Approves upon review

Stop 5: SOM Finance
• Receives request via Infoporte
• Approves lump sum actions in ConnectCarolina based on letter & Excel documents

* SOM Finance and SOM HR created a Clinical Incentive letter template and an Excel template to be used for this process. The ACA should not submit the Infoporte request, as he/she will be the one approving the request.
SOM Department submits Lump Sum action via a ConnectCarolina ePAR

- The Clinical Incentive letter and spreadsheet templates should already be routing via the Infoporte routing process before the Lump Sum ePAR is submitted.

Department Approvals

- Routes to Level 1 simultaneously:
  - Level 1 HR
  - Level 1 Finance

SOM School Approvals

- Routes to Level 2 simultaneously:
  - Level 2 HR reviews for effective date, work performance date range & salary cap
  - Level 2 Finance reviews for account code, and lump sum type

* Please note: level 2 Finance will not be able to approve until the Infoporte routing process is complete
Process Specifics

- The Clinical Incentive letter template and spreadsheet template need to be in Infoporte routing and at Stop 2 (UNCFP Financial Services) by the 5th of the month for which the Lump Sum action is being processed. There is no guarantee the payment will be made for the given month if the letter and spreadsheet are not received by the 5th of the month.
  - For example: if the lump sum is to pay out in September, the letter and spreadsheet will need to be at Infoporte Stop 2 by September 5th.

- It is recommended to submit the ePAR Lump Sum via ConnectCarolina after the Clinical Incentive letter and spreadsheet are submitted via Infoporte routing.

- Examples of periods of performance:
  - **Bi-Annual**
    - Work performance: July ‘18 – December ‘18
    - Pays out: March ‘19
  - **Quarterly**
    - Work performance: April ’19 – June ‘19
    - Pays out: September ‘19
Considerations

**FINANCE**

Finance Level 2 approvals will be checking for account code and payment type in the Lump Sum ePAR.

**HR**

Departmental HR is responsible to review salary caps before the action is submitted.

HR Level 2 approvals will be checking for work performance periods, effective dates, and salary caps in the Lump Sum ePAR.

The department is responsible for accuracy and compliance to the departmental compensation plan. Please be sure to maintain appropriate auditable records to support payments.