Summary
Below are some of the main elements of the Multi Fund Panel page:
Multi-Fund Panel:

Purpose
The purpose of the multi-fund panel is to allow the user to quickly reference recently used and viewed closeout packets. The multi-fund panel consists of a search bar (green box), a go button (red box), the ability to look at previous funds (blue box) and recently viewed funds (orange box):

Screen Group
The Multi-Fund Panel accessed by clicking on the Fund Details tab:
Screen View
The Multi-Fund panel is viewable to every user.

Panel
Go Button: This button allows users to search for a closeout packet from the Closeout tab. If the user navigates directly to the Closeout tab and there is no fund in the multi-fund panel, instead of from another page, a blank Status Summary page will appear. The user can use the “Get Fund” search to view the COP.

Clear: Will clear the current search criteria in the Get Fund box.

PI: If the user has access to more than one Closeout Packet for that fund number, a popup will appear for the user to select the correct COP based on the PI. The Home PI will be listed first in bold. The Linked PIs will be listed afterwards in alphabetical order by last name. Once the user makes their selection, and clicks OK, the Closeout Packet will be retrieve.

If the user only has access to one Closeout Packet, the popup will not appear.

If the user types in a fund on the search text box that corresponds to multiple PIs, they must choose a PI or click “Cancel.”
You can only type fund numbers into the search box, not PI names.

If you already have the packet opened and it’s on your fund panel, if you try searching for said fund, the fund on the panel will be highlighted and will automatically open.

If the user types in a fund on the fund search text box that does not exist and proceeds to click on the “Get Fund” button, an error message will be displayed.

**Recently Viewed:** This will list the COP funds that the user has viewed during the current session. A tooltip will display the full name of the PI: Last, First, MI and Dept Code and Dept Title on a second line, and the budget end date on a third line.

The fund that is currently viewed should be highlighted. The maximum number of funds that will be displayed is 10. Once the 11th fund is added, the last fund will be dropped from the list.

If a user navigates to a fund in the list, they should be taken to the last page of the COP they viewed. The selected fund will not move to the top and will stay in the same position.

The “X” next to the fund number allows the user to close the COP at any time. If the user closes the COP they are currently viewing, the next COP on the list will appear. If there are no COPs left in the list, a blank Closeout Packet Overview page will appear.

The multi-fund panel is hidable and unhidable by clicking the icon next to “Get Fund”.

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Multi-Fund Panel and Back Button:

When a fund is added to the Multi-fund Panel and the back button is clicked, the added fund shall appear in the Multi-Fund Panel. When a fund is added to the Multi-Fund Panel and the forward button is clicked, the fund shall appear on the Multi-Fund Panel. When a fund is removed from the Multi-Fund Panel and the back button is clicked, the removed fund shall be re-added to the Multi-Fund Panel if the removed fund was the currently active fund at that time. When a fund is removed from the Multi-Fund Panel and the forward button is clicked, the removed fund shall be re-added to the Multi-Fund Panel if the removed fund was the currently active fund at that time.

Multi-Fund Panel and Breadcrumb:

When a new fund is added to the Multi-Fund Panel and the user selects another fund within the Multi-Fund Panel and also clicks on its breadcrumb, the newly added fund will continue to appear on the Multi-Fund Panel.

Closeout Wizard (Next and Previous Links)

Purpose

These buttons allow the user to page through the links listed under the “Expenditure Review” section on these Status Summary page. Allows the user to easily navigate through the pages of the COP that they need to review. The links are located on pages located within the Closeout Packet.

Screen Group

The Closeout Wizard (Next and Previous Links) are available under the Fund Details Tab. You can access the links while on pages within the Closeout Packet.

Screen View

Every user can view and use the Closeout Wizard (Next and Previous Links).

The Links

Next Link: The Next Button helps the user navigate through the pages of the Closeout Packet. It will take users through the existing links under the “Expenditure Review” section on the Status Summary page. The link is not titled “Next,” it is titled the next page in the Closeout Packet.
**Previous Link:** The Previous Button helps users navigate through the pages of the Closeout Packet. They will take users through the existing links under the “Expenditure Review” section on the Status Summary page. The Previous Button for this page will take the user to the previous available page in the Closeout Packet. The link is not labeled “Previous link” but the title of the previous available page.

**Navigation:** The Next and Previous links will follow the live links on the Status Summary page, regardless of the status. If a link is active, the navigation will go to the page (i.e. there are no prior years associated with that fund, but the page is still available). On the first page, only the Next link is available. On the last page, only the Previous link is available.

If the selected Fund is a Home COP, then the Closeout Wizard will only go to pages that apply to the Home Closeout Packet. If the selected Fund is a Linked COP, then the Closeout Wizard will only go to the pages that apply to the Linked COP.

Navigation will follow the back button, so when a user navigates through the wizard, the history will be saved. The wizard will be disabled when Linked Accounts are being reviewed by a Home Fund Manager. This is to prevent confusion with the current COP (i.e: if the Home dept clicks on a Linked account COP from the COP Overview page, the user will “enter” the linked account COP and the wizard will be disabled).

**Fund Details Header**

**Purpose**
The purpose of the Fund Details Header is to provide the user with a quick reference information for the user to easily identify the fund.

**Screen Group**
The Fund Details Header is located on every page of the Closeout Packet.

**Screen View**
The Fund Details Header is viewable to all.

**Header**
The Header provides the user with the basic fund information: Fund number, Sponsor, Budget Period, PI, Award Number and the COP due date.

**PI:** The PI’s name should be displayed for the current COP user. The Home Dept and EFM will also be able to see the PI’s name. Linked account COPs should see the PI specific for that account/cc.
Dept Due Date: This is the due date of the COP for the department.

- Note: If the multi-fund box in PATS is selected, then the due date logic should run off the award end date. If the checkbox is not selected, then the due date logic should run off the budget end date.
- If the Sponsor Due Date is greater than or equal to 60 days: Due date to EFM = Sponsor due date – 30 days
  - Note: EFM always gets 30 days
  - Dept will get remainder (always 30 days or more)
    - Ex:
      - Budget End date to Sponsor Due date timeframe is 75 days
      - EFM timeframe= 30 days
      - Dept timeframe: 75-30= 45 days
- If 14 days after end day < Sponsor Due Date is < 60 days: Due date to EFM= # days between budget end and Sponsor Due date/2
  - Split # of days equally between Dept and EFM
  - Minimum of 7 days for each
  - If uneven, the Dept gets the extra day
- If Sponsor Due Date < 14 days after budget End Date: Due date to EFM= 7 days prior to sponsor due date
  - Minimum 7 days for each
  - May mean submitting to EFM prior to the Budget End Date
    - Example:
      - Budget End date to Sponsor Due Date timeframe is 0 days
      - EFM timeframe= 7 days
      - Dept timeframe= any time prior to 7 days before sponsor due date and budget end date
- If the fund is Pending NCE status and the sponsor rejects the request, the due dates for EFM and the department will recalculate according to the above schedule from the date the rejection is noted in the system.
  - The NCE should be associated with the Final or Final for Budget Period Provision with the closest due date within 6 months of the date of the sponsor request.
    - Example: In order to get the denial date, you will want:
      - Approval Type: NCE
      - Approval Status: Denied
• Response Date: Date NCE rejected by sponsor (this is the date to recalculate off of)
• For Linked Accounts, the Due Date should say, “Due to Home” instead of “Due to EFM”
  o The Linked COP will be due to the Home Dept 12 days before the Home COP is due to EFM
  ▪ Ex: If the Home COP due date is 3/31/12, then the Linked COP due date is 3/19/12.

Sponsor Name: The Sponsor Name displayed on the Header can be the short name.

Report Generation
None of these can be exported to Excel.

Page Access
These are accessible to: EFM Director, Dept Sr Fund Manager, Dept Admin, Dept Fund Manager, EFM Supervisor and EFM Fund Manager.