COP 09, 33- Upload RAPID COP through PAMS

Purpose
The purpose of the Process COP Option: Upload RAPID COP through PAMS is to allow users to upload RAPID Smart Closeout Tool packets into PAMS. This option allows users to complete the closeout packet using the RAPID Smart Closeout Tool and then upload it into PAMS to facilitate workflow. This allows users to maintain an accurate worklist and visibility into the status of the closeout packet.

To access the Upload RAPID closeout packet, navigate to the Fund Details tab, input the fund number and click go. The only Expenditure Review link that will appear for this method is Fund Balance and Approvals.
On the Fund Balance and Approvals page, the assignment tree appears along with a button to upload the RAPID Smart Closeout Packet. Users will be able to approve and reject the closeout packet through the assignment tree.

**Approvals**

**Approver Title and Name:** A list of all individuals that must approve the closeout packet from Department Preparer to EFM Approver. The names listed here are from the Assignments page under the Administration tab.

**Action Buttons**

Action buttons will only appear for that users’ name when they are of the closeout packet. The Upload RAPID COP button will always appear, regardless of the packet owner.

The Department Preparer will only see the Approve button.

Department Approvers, EFM Preparer and EFM Approver’s will see two buttons: Approve and Reject.
If a Department Preparer/Reviewer is in Reviewed Linked Mode for the linked accounts, they will only see one button: Route back to the Linked Department.

**Approve Button:** If a user clicks the Approve button, the COP Approval: Comments and routing popup will appear. If the user clicks Cancel from this popup, their approval will not be saved and the same button will appear. If the user clicks Submit from this popup, the closeout packet will be routed to the specified user on the popup. If the last approver has just approved the closeout packet, the packet will be considered locked.
Reject Button: If a user clicks the Reject button, the COP Approval: Comments and routing popup will appear. If the user clicks Cancel from this popup, their rejection will not be saved and the same buttons will appear. If the user clicks Submit from this popup, the closeout packet will be routed to the approver that was picked by the current editor.

Route back to Linked Dept Button: This button is only accessible through Review Mode when a Home preparer or approver is reviewing the linked closeout packet. If the user clicks the Route back to Linked Dept button, the COP Approval: Comments and the routing popup will appear. If the user clicks Cancel from this popup, their routing will not be saved and the same button will appear. If the user clicks Submit from the popup, the packet will be routed to the approver that was picked by the current editor.
Approval Status: Once a user approves the closeout packet, the following approval status should appear: Approved by [First, Last] on mm/dd/yyyy.

If a user rejects the packet, the following approval status should appear next to the name of the user that rejected, “Rejected COP on mm/dd/yyyy.”

If a user from the Home dept routes back a Linked closeout packet from Review Mode, the Linked dept will see “Routed back by [First Last] on mm/dd/yyyy.”

For all users that are not the editor/approver, these users will see the following for the current editor/approver “Pending Approval.”

All users have the ability to click on the Upload RAPID COP button. After a document has been uploaded, the button changes to RAPID COP Uploaded.
**Linked COP expiration Window:** All Linked closeout packets are due to the Home dept 12 calendar days before the Home closeout packet is due to EFM. If the Linked closeout packet due date expires and there are Linked users that have not approved the closeout packet, the Linked users will lose all edit rights. The Linked closeout packet will be “routed” to the Home department. Linked users will not see any action buttons. For all Linked approvers that did not approve the closeout packet before the expiration window, the Approval Status should say “Automatically routed to Home on mm/dd/yyyy.”

**Approval Comments:** When users route the packet (from approval or rejection) comments are added. All comments should be listed above the Approvals. If the user clicks on the comments icon, the Comments popup page will appear will all Comments associated with Approvals.

**How to Change the Process COP Option**
Department users are unable to change the Process COP Option. To change a packet to Upload RAPID COP through PAMS contact either your EFM Accountant or PAMS Help.

**Report Generation**
This page cannot be sent to Excel.
Page Access

The page is viewable to all.