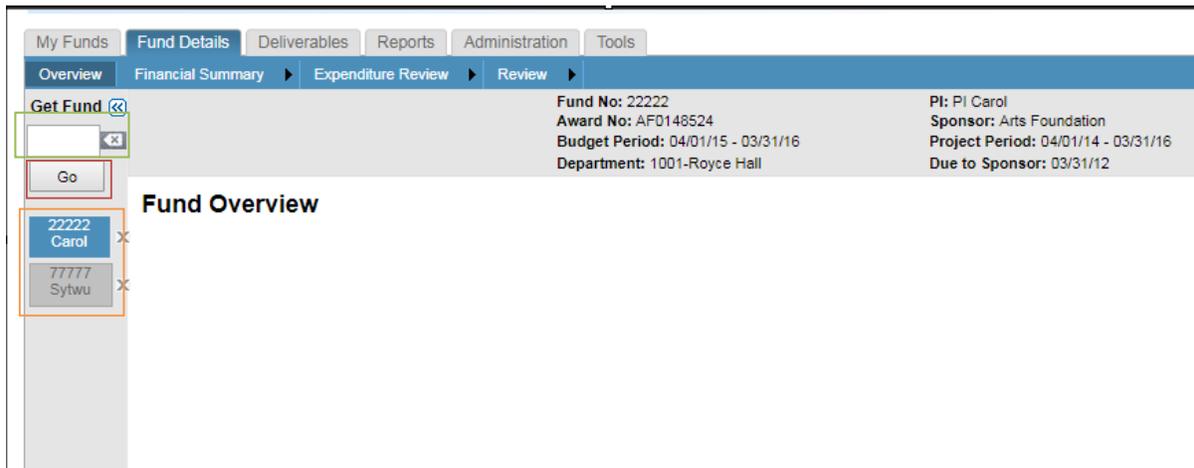


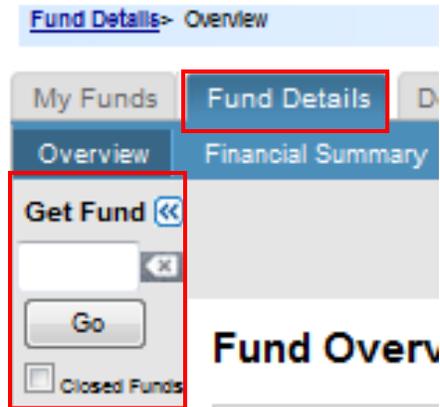
## Fund Details: Multi-Fund Panel & COP Header

### Summary of Multi Fund Panel

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):



The Multi-Fund Panel accessed by clicking on the Fund Details tab:



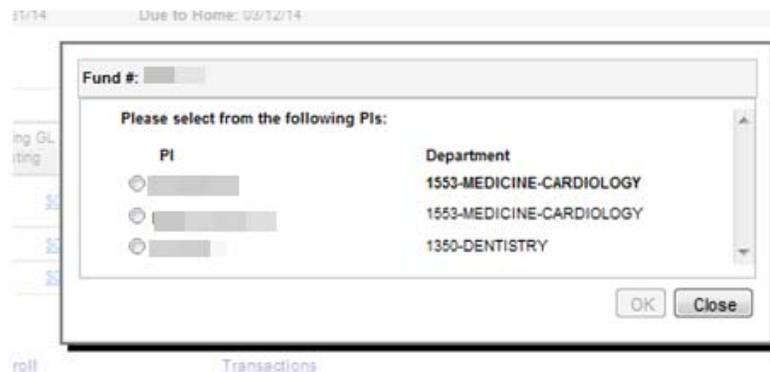
The Multi-Fund panel is viewable to every user.

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

**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.

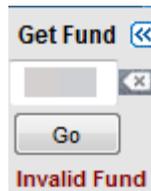
If the user types in a fund on the search text box that corresponds to multiple PIs, they must choose a PI or click “Cancel.”

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.

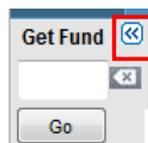


The fund that is currently viewed should be highlighted. The maximum number of funds that will be displayed is 10. Once the 11<sup>th</sup> fund is added, the last fund will be dropped from the list.

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".



**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.

## Fund Details Header

### Summary of the Fund Details Header

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.

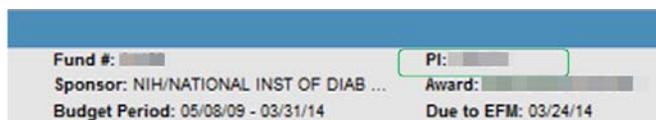
The Fund Details Header is located on every page of the Closeout Packet, and is viewable to all.



### 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
- For Linked Accounts, the Due Date should say, “Due to Home” instead of “Due to EFM”
  - 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.

Fund #: [REDACTED]	PI: [REDACTED]
Sponsor: NIH/NATIONAL INST OF DIAB ...	Award: [REDACTED]
Budget Period: 05/08/09 - 03/31/14	Due to Home: 03/12/14

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

Fund #: [REDACTED]	PI: [REDACTED]
Sponsor: NIH/NATIONAL INST OF DIAB ...	Award: [REDACTED]
Budget Period: 05/08/09 - 03/31/14	Due to Home: 03/12/14