Agenda

- Financial Reporting Project Overview
- RAPID Smart Closeout Tool Metrics
- Post Award Management System (PAMS) progress
Project Overview

- **Goal:** Improve Financial Reporting to address the cause of delays in on-time submission of financial reports to sponsors

- **Deliverables:**
  1. Process Improvements
  2. Short-Term Solution
     - RAPID Smart Closeout Tool
  3. Long-Term Solution
     - Web-based Post Award Mgmt System
RAPID Smart Closeout Metrics

- Closeout Tool Submission at 99%!! 😊
- Usage Goal
  - Smart Closeout Tool 100%
  - Upload Tool 100%

<table>
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<tr>
<th>Smart Closeout Tool Metrics</th>
<th>July</th>
<th>August</th>
<th>Sept</th>
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<tbody>
<tr>
<td>Total # Closeout Submissions</td>
<td>98</td>
<td>152</td>
<td>140</td>
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<tr>
<td>RAPID Closeout Packets Submitted</td>
<td>85</td>
<td>87%</td>
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<tr>
<td>Closeout Packets Submitted via Upload Tool</td>
<td>55</td>
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Closeout Upload Tool

- Located: ORA Portal Post-Award Tab
  - http://portal.research.ucla.edu

- Benefit
  - Saves mail server space
  - Ensures proper routing to EFM

- Expect EFM friendly reminders

- Enhancement: Sponsor Name
## PAMS Progress Chart

### Post Award Management System (PAMS)

<table>
<thead>
<tr>
<th></th>
<th>Wkload Mgmt</th>
<th>Closeout Sub</th>
<th>EFM Process</th>
<th>Fin Rpt &amp; Invoice Templates</th>
<th>Metrics</th>
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<th>Sys Integration</th>
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PAMS

- Design, Development, and project team Review under way
- Fund Expiration Notification to use a component of PAMS
- Collaboration with PATS
Thank You