



Extramural Fund Management

August 12, 2021

PAMS Advance Deliverable Search

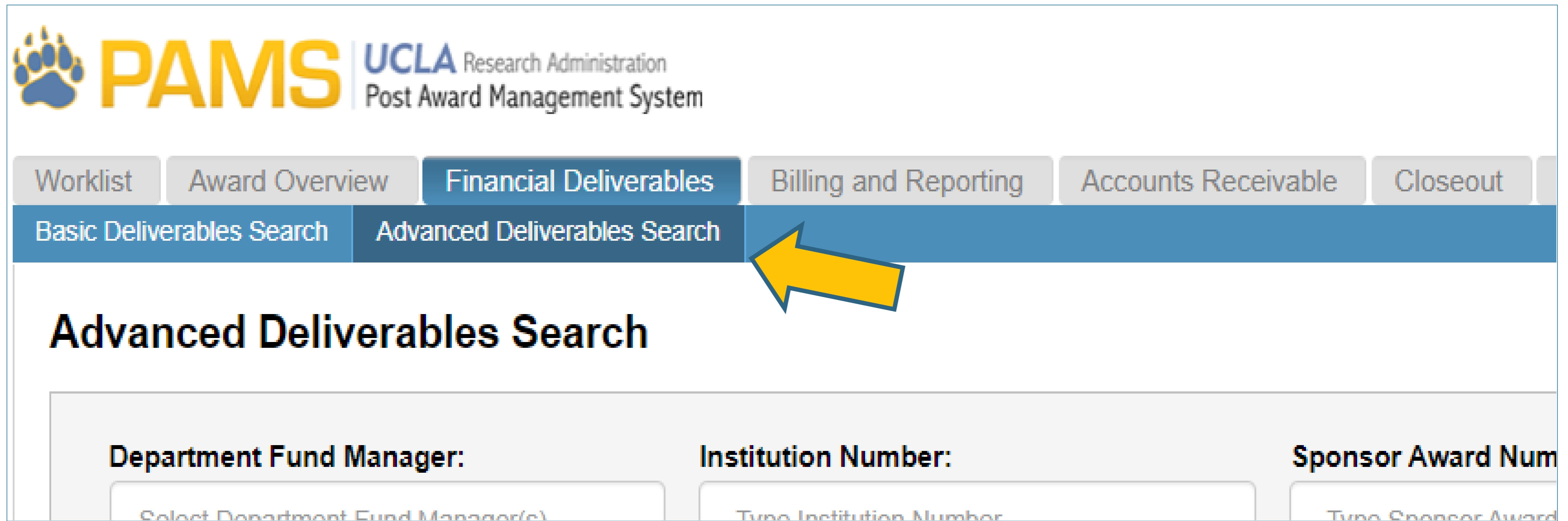
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Post Award Management System (PAMS)

- PAMS houses post award information for contract and grant awards, including financial deliverables (invoices/financial reports) that are due to the sponsor.
- Department administrators have access to a worklist which shows closeout packets and financial deliverables that require their action.
- **Financial deliverables that require department fund managers action have a status of “Pending Department Action”.**
 - Timely action by the department is important for the Principal Investigator’s compliance with award terms and conditions and cost recovery.
 - For final deliverables, it is important for departments to submit closeout packets to EFM on time so that EFM can prepare the final financial deliverable invoicing/reporting for as many expenses as possible.

PAMS Advance Deliverable Search - New Feature!

- The advanced deliverable search page was available for campus use on Friday, 6/11/21.
- In the Financial Deliverables tab, select “Advance Deliverable Search”.



The screenshot displays the PAMS (Post Award Management System) interface for UCLA Research Administration. The top navigation bar includes tabs for Worklist, Award Overview, Financial Deliverables (selected), Billing and Reporting, Accounts Receivable, and Closeout. Under the Financial Deliverables tab, there are two sub-tabs: Basic Deliverables Search and Advanced Deliverables Search. A yellow arrow points to the Advanced Deliverables Search tab. Below the navigation, the page title is "Advanced Deliverables Search". The main content area shows search criteria fields: Department Fund Manager (with a dropdown menu), Institution Number (with a text input field), and Sponsor Award Num (with a dropdown menu).

PAMS Advance Deliverable Search

- Access to various data parameters to help with monthly reconciliation.



Worklist | Award Overview | **Financial Deliverables** | Billing and Reporting | Accounts Receivable | Closeout | Management Reports | Administration

Basic Deliverables Search | **Advanced Deliverables Search**

Advanced Deliverables Search

Department Fund Manager: Select Department Fund Manager(s)	Institution Number: Type Institution Number	Sponsor Award Number: Type Sponsor Award Number	Category: Select Deliverable Category(s)	Due Between: [] []
PI Name: Type PI Name(s)	Fund Number: Type Fund Number	Sponsor Name: Type Sponsor Name(s)	Type: Select Type(s)	Completed Between: [] []
Department Name (Code): Type Department Code or Title(s)	EFM Accountant: Select Accountant(s)	Sponsor Type: Select Sponsor Type(s)	Frequency: Select Deliverable Frequency(s)	<input type="checkbox"/> Include Purged Funds <input type="checkbox"/> Include All NIH Sponsors
	Reassigned Accountant: Select Reassigned Accountant(s)	Prime Sponsor Type: Select Prime Sponsor Type(s)	Status: Select Deliverable Status(es)	Reason Code: Select Reason Code(s)

Search Clear

PAMS Advance Deliverable Search Features

- Access to real-time financial deliverable data and documents.
- Search grid has predictive text, and most fields allows multiple selections.
- Search results are exportable to Excel.
- Hyperlinked fund numbers take users directly to the Deliverable List for all financial deliverables associated to that fund (e.g., invoices/financial reports, comments, deliverable history).
- The “Due Dates” are dates when the financial deliverables are due to the sponsor.
- Latest comment is included in the results grid, displaying the last action taken for the financial deliverable.

Financial Deliverables Requiring Department Action

- Search for deliverables by Department Fund Manager Joe Bruin with a status of “Pending Department Action”.

Advanced Deliverables Search

Department Fund Manager: Bruin, Joe	Institution Number: Type Institution Number	Sponsor Award Number: Type Sponsor Award Number	Category: Select Deliverable Category(s)	Due Between: [Calendar Icon] [Calendar Icon]
PI Name: Type PI Name(s)	Fund Number: Type Fund Number	Sponsor Name: Type Sponsor Name(s)	Type: Select Type(s)	Completed Between: [Calendar Icon] [Calendar Icon]
Department Name (Code): Type Department Code or Title(s)	EFM Accountant: Select Accountant(s)	Sponsor Type: Select Sponsor Type(s)	Frequency: Select Deliverable Frequency(s)	<input type="checkbox"/> Include Purged Funds <input type="checkbox"/> Include All NIH Sponsors
	Reassigned Accountant: Select Reassigned Accountant(s)	Prime Sponsor Type: Select Prime Sponsor Type(s)	Status: Pending Department Action	Reason Code: Select Reason Code(s)

Financial Deliverables Requiring Department Action

- EFM will contact the department fund manager when their assistance is required to complete the deliverable. The deliverable status will be updated to “Pending Department Action” and a reason code with comments will be added to identify the information needed to complete the financial deliverable.

16 deliverables found. Results are limited based on your access.

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Fund Number	Sponsor Type	Prime Sponsor Type	Sponsor Name	Sponsor Award Number	PI	Department Fund Manager	Due Date	Type	Category	Frequency	Status	Reason Code	Comment Date	Comment	EFM Accountant
12345	Non-Government	Federal Government	UNIVERSITY OF NORTH CAROLINA	5117865	Wooden, John	Bruin, Joe	01/30/22	Final	Financial Report	Once	Pending Department Action	No Cost Extension Pending	06/02/21	06/02/21:TN: Per PI's email dated on 06/01/21, NCE ...	EFM Accountant
23456	Private		The Ranch Malibu Venture I	20195237	Wooden, John	Bruin, Joe	11/14/21	Final	Financial Report	Once	Pending Department Action	Sponsor Template	05/25/21	Pending completion of sponsor template	EFM Accountant
34567	Non-Government	Federal Government	RESEARCH FOUNDATION For STATE UNIVERSITY OF NEW YORK, THE	100-1145511-80872:01	Block, Gene	Bruin, Joe	09/30/21	Final	Internal Financial Report	Once	Pending Department Action	Policy 913 Documents	05/18/21	Pending closeout and P913 documents from departmen ...	EFM Accountant
89012	State Government		CA-DEPARTMENT OF HEALTH CARE SERVICES	18-95380	Block, Gene	Bruin, Joe	08/28/21	Final	Financial Report	Once	Pending Department Action	Supporting Documentation	05/14/21	Pending corrections to cost share report. Also, p ...	EFM Accountant
														Pending	

Financial Deliverable Reason Codes

Reason Code	What this means	Action for Department to take
Continuation or No Cost Extension Pending	The final financial deliverable cannot be completed as the awards is pending continuation funds or a no cost extension.	Department to ensure the award action is processed. EFM creates an interim deliverable for expenses recorded to the ledger up through the end of the original performance period. Once the award action is processed, EFM will complete subsequent financial deliverables through the additional funding/time period.
Pending PI Confirmation	PI's confirmation is needed to complete the financial deliverable (e.g., milestone invoice)	Department to obtain PI's confirmation of milestone. EFM will invoice the sponsor when the PI's confirmation is received.
Policy 913 Documents	The final deliverable cannot be completed as the award is subject to UCLA Policy 913 and EFM is missing documents.	Department to provide a closeout packet with Policy 913 assurances including the PI's justification for the unspent balance, as applicable. EFM will review and closeout the fund, transferring balances to PI's discretionary account.
Sponsor Templates	Detailed financial sponsor template that requires department assistance to complete.	Department to complete the sponsor's financial template and submit to EFM. EFM will review and submit to the sponsor.
Supporting Documentation	Documents to be submitted with the financial deliverable (e.g., cost share report).	Department to provide EFM with the required supporting documentation. EFM will review and submit to the sponsor.
Other	Used to explain all other cases where a financial deliverable cannot be completed.	Department to act on information identified by EFM to complete the deliverable.