PAMS Advance Deliverable Search

Jennifer Iglesias
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.

Log into PAMS https://pams.research.ucla.edu/pamsmvc/
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”.

![Advanced Deliverable Search](image-url)
PAMS Advance Deliverable Search

- Access to various data parameters to help with monthly reconciliation.
PAMS Advance Deliverable Search Features

- Access to real-time financial deliverable data and documents.
- Search grid has predictive text, and most fields allow 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
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.
# Financial Deliverable Reason Codes

<table>
<thead>
<tr>
<th>Reason Code</th>
<th>What this means</th>
<th>Action for Department to take</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continuation or No Cost Extension Pending</td>
<td>The final financial deliverable cannot be completed as the awards is pending continuation funds or a no cost extension.</td>
<td>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.</td>
</tr>
<tr>
<td>Pending PI Confirmation</td>
<td>PI's confirmation is needed to complete the financial deliverable (e.g., milestone invoice)</td>
<td>Department to obtain PI's confirmation of milestone. EFM will invoice the sponsor when the PI’s confirmation is received.</td>
</tr>
<tr>
<td>Policy 913 Documents</td>
<td>The final deliverable cannot be completed as the award is subject to UCLA Policy 913 and EFM is missing documents.</td>
<td>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.</td>
</tr>
<tr>
<td>Sponsor Templates</td>
<td>Detailed financial sponsor template that requires department assistance to complete.</td>
<td>Department to complete the sponsor’s financial template and submit to EFM. EFM will review and submit to the sponsor.</td>
</tr>
<tr>
<td>Supporting Documentation</td>
<td>Documents to be submitted with the financial deliverable (e.g., cost share report).</td>
<td>Department to provide EFM with the required supporting documentation. EFM will review and submit to the sponsor.</td>
</tr>
<tr>
<td>Other</td>
<td>Used to explain all other cases where a financial deliverable cannot be completed.</td>
<td>Department to act on information identified by EFM to complete the deliverable.</td>
</tr>
</tbody>
</table>