Project Update
Yoon Lee
EFM Assistant Director
PAMS Project Director
Agenda

- What is PAMS?
- PAMS: Daily Fund Management Tool
- Pilot Status
- Pilot Group Demographics
- Pilot Timeline
- Q&A
What is PAMS?

- Web-based Post Award Management System that displays near real-time data to facilitate more efficient and effective financial management of sponsored awards and financial compliance oversight

Who is PAMS for?

- Department & EFM fund managers and management teams who conduct post award management activities including invoice/report submission to sponsors and fund closeout

What are PAMS key benefits?

- Allows users to review, edit, and approve financial activities on-line in a single system and to communicate the status in real time.
- Provides customized worklist for individual user to prioritize work and monitor progress to achieve a higher level of compliance.
PAMS: Daily Fund Management Tool

My Funds > Workload

Workload

Interim Reports and Invoices

5
3 Upcoming 30 Days
2 Past Due

Closeout Packets Due to EFM

13
8 Upcoming 30 Days
2 Upcoming 30 days
3 Missing Managing PI Past Due

Pending Response

4
2 NCE/Amendment
2 Carry Forward Approval

Pending Y/N Action - Under Dev

22
10 EFM
12 Dept
PAMS: Daily Fund Management Tool

- **My Funds**
  - At a glance work list updated in real-time.
  - Help ensure a higher level of compliance.
  - Easy to prioritize work every day.
  - Fund managers can view individual work list.
  - Managers can view work lists for the team.
PAMS: Daily Fund Management Tool
PAMS: Daily Fund Management Tool

**Administration**

- Department Administrators can assign specific fund managers to specific funds based on their own structure.
  - By department, sponsor type, award type, PI, fund number, and etc.
- Fund Managers have access to financial information only for the funds they are assigned to.
  - Help enforce more granular level of security
# Provision List

**Get Fund:** 22222 | **Fund No:** 22222 | **Pl:** Lee, Jessica

**Sponsor:** NIH | **Award:** SP30 CA09335-01

## Report and Invoice Schedules

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PAMS: Daily Fund Management Tool

- **Provision**
  - Fund managers can check the status in real time.
  - Fund managers can retrieve a copy of invoice or financial report at any time.
  - Sr. Fund managers can edit invoice or financial report as required once PAMS generates a draft.
PAMS: Daily Fund Management Tool

Financial Summary

- Appropriation: $239,500.00
- Expenditures: $236,065.71
- Encumbrances & Memo Liens: $0.00
- GL Balance: $3,434.29
- Pending GL Posting: $(345.64)
- Current Balance: $3,779.93
- Pending Review: $4,069.90
- Estimated: $4,395.49

Expenditure Review

- Expenses Outside Period: Non Payroll
- Expenses Outside Period: Payroll
- Unallowable/Warning Codes
- Administrative Salaries
- Subawards
- Encumbrances & Memo Liens
- Salary Over the Cap
- Additional Cost Transfers
- Cost Share
- F&A Reconciliation
- Fund Balance and Approvals

Review Transactions
PAMS: Daily Fund Management Tool

### Closeout

- Monthly review and reconciliation facilitates effective closeout.
- Fund managers can view and reconcile the current fund status any time throughout the lifecycle of the fund.
- Compliance dashboard will facilitate fund manager’s monthly reconciliation.
- Minimum reconciliation to perform at the fund end.
PAMS Pilot Status

- Conducted instructional meeting with pilot user groups
- Collected PAMS Access Forms for all pilot user groups
- Finalized and assessed the pilot group
## Pilot Demographics

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<td>Letters &amp; Science</td>
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PAMS Timeline

- **Application Development**
  - Aug
  - Sep
  - Oct

- **Testing**
  - Oct

- **Training**
  - Nov

- **Pilot Deployment**
  - Dec

- **Go Live**
  - Jan
PAMS Support

Contact us

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Technical & Business Analyst Teams

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