Proposal and Award Management Information System

Users Guide

PAMIS, version 1

April 2004
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INTRODUCTION

The Proposal and Award Management Information System (PAMIS) was developed to increase efficiency in the flow of award information and provide award documentation electronically to the UCR community. PAMIS allows the Office of Research Affairs to create an award that links to UCR’s Financial System (UCRFS) and provides electronic notification to the appropriate individuals (e.g. Principal Investigators, PI departments, Accounting). PAMIS also contains the ability for the PI’s department to create and submit an electronic Budget Category breakdown (BC form) establishing the budget in UCRFS and the authority to expend funds.

PAMIS records and tracks five key events in the award process:

1. **Award Received on** – date award is received in ORA.
2. **Award Activated on** – dated award is activated by ORA and Notice of Award notification, e-mail #1, is sent.
3. **Fund Established on** – date Accounting assigned Fund Number & Attributes and Submit BEA notification, e-mail #2, is sent.
4. **PAMIS Budget Submitted on** – date department submits BEA to UCRFS.
5. **Funds Available on** – date funds posted and available in UCRFS and Award Allocation notification, e-mail #3, is sent.
PAMIS NOTIFICATIONS

Notice of Award – The PAMIS process begins with an e-mail notifying the Principal Investigator that an award has been processed by the Office of Research Affairs (E-mail #1). The e-mail provides a web link to the associated award documents in PDF format (note: a password is required to view scanned documents). An example of E-mail #1 is on Page 4. Recipients include:

1. Prime PI and Co-PIs
2. Department Transactors (as established in EACS)
3. Courtesy Copy (as established in EACS)
4. Accounting

Fund Number and Submit BEA – A second e-mail notifies the department transactor (established through EACS) of the Fund establishment and the availability to “submit” the award budget to UCRFS (E-mail #2). Once submitted, the budget (BEA) posts overnight. An example of E-mail #2 is on Page 20.

PAMIS Award Allocation – After the budget posts to the general ledger, the final e-mail in the process notifies the Principal Investigator that the award funding is available for expenditure (E-mail #3). An example of E-mail #3 is on Page 22. Recipients include:

1. Prime PI and Co-PIs
2. Department Transactors (as established in EACS)
3. Courtesy Copy (as established in EACS)
4. Equipment Management
5. Accounting

ACCESS TO AWARD INFORMATION

Information in PAMIS is available in two ways:

Secure Access (UCR Net ID/password required)
1. Notice of Award (NOA)
2. Fund Number & Attributes (UCRFS codes)
3. BEA (budget allocation information)
4. Status of Award (grid listing key dates in award set-up)
5. Scanned Documents (sponsor award and budget)

Non-secure Access (non-password protected)
Allows access to all items under secured access except item #5 Scanned Documents.

DEPARTMENTAL ROLES AVAILABLE IN PAMIS

Within EACS the following roles are available in PAMIS:

TRANSACTOR: Allows access to all aspects of PAMIS, including the ability to create/submit the PAMIS BEAs and receives all e-mail notifications.

INQUIRER: Allows read-only access to all aspects of PAMIS, but does not receive e-mail notifications.

COURTESY COPY: Allows access to Award Information (Search) screen in PAMIS (excluding scanned documents), but receives e-mail notifications #1 and #3.
Please direct any questions concerning PAMIS to Cynthia Parish at x8-5535.

**SECURE ACCESS**

Secure access to this web site is restricted to individuals with valid UCR Net IDs and passwords.

**Department**

The departmental System Access Administrator (SAA) establishes PAMIS Transactors, Inquirers, and Courtesy Copies using the Enterprise Access Control System (EACS). PAMIS access is linked to the SAA’s organizational, division or department code (e.g. accountability structure); users can only view award documents associated with their department. Please contact your SAA for access to PAMIS. If you have questions regarding EACS, please contact Marc Guerra at x8-6345.

**Principal Investigator(s)**

Principal Investigator and Co-Investigator authentication is available via the UCR Enterprise Directory (LDAP). PIs and CoPIs are not required to register in EACS. The UCR Net ID and password is the same username and password that faculty use for FOCAS services (e.g. RAS, Proxy, etc.) as well as WebMail. For assistance regarding your username and password, contact the Help Desk at x8-3555.

Using the UCR Net ID and password, log in to PAMIS to access award information and view scanned documents related to awards. E-mail notification is sent when the award has been activated by ORA, and when the BEA has been submitted and posted to UCRFS.

**NON-SECURE ACCESS**

Non-secure access to PAMIS allows for viewing of award information and does not require logging in to the web site; access to the scanned award documents is not provided.

**ACCESSING THE PAMIS WEB SITE**

Access the PAMIS web site at PAMIS.UCR.EDU. When prompted input valid **username/password**, and click the LOGIN link.

After logging in, the search screen will display and a number of search options for awards is available. Awards are organized in PAMIS Award Number order. To view

1. Fund Information, click on *Fund* under the *View* option
2. Notice of Award, click on the *NOA* under the *View* option
3. Status of Award, click on the *PAMIS Award Number* under the *Award Number* option
4. BEA Information, click on *BEA* under the *View* option
5. ORA/Manual Records, click on *View ORA/Manual Records* on the Search Display screen
AWARD ACTIVATION

When an award is activated by the Office of Research Affairs in their database, PAMIS sends an e-mail notification to the Prime Principal Investigator, Co-PIs, Department Transactor(s), Accounting, and Courtesy Copy.

NOTICE OF AWARD (E-mail #1)

Date: Tue, 9 Mar 2004 15:56:11 -0800
From: PAMIS WebMaster
Reply-To: NOREPLY@ucr.edu
To: Transactor@ucr.edu
Subject: Notice of Award - Award Number 001234-002 Jim Nasium

This e-mail transmits the Notice of Award for the Award Number referenced above, which has been created in PAMIS by the Office of Research Affairs. Please click on the link below to access this Notice of Award. http://ora.ucr.edu/appOraGeneral/Coeus/forms/NOA.asp?AN=001234-002

Award Information:
Prime PI: Jim Nasium
CO-PIs: Annie O. Klee
Sponsor Name: NATIONAL SCIENCE FOUNDATION
Award Amount: $232,004.00

The original award document may be accessed electronically and the budget established for this award via the UCR Proposal and Award Management Information System (PAMIS): http://pamis.ucr.edu

For further information please contact Cynthia Parish by phone at 8-5535 or by e-mail at cynthia.parish@ucr.edu

This is an automatically generated message. Do not use the "REPLY" button as your message will not be received and will be returned to you by the mail server.

cc:
PrimePI@ucr.edu
CoPIs@ucr.edu
CourtesyCopy@ucr.edu
Transactor@ucr.edu
Accounting@ucr.edu
LOGGING INTO PAMIS

LOGIN DISPLAY

Once notification is received that an award has been activated, the award documentation can be accessed in PAMIS.

Secure Access
By logging in to PAMIS, access is provided to the Notice of Award (NOA), Fund Information, BEA Information, and Status of the Award, as well as to the Scanned Documents.

Non-secure Access
By selecting the Award Information option, view-only access is provided to the Notice of Award (NOA), Fund Information, BEA Information, and Status of the Award.
SEARCHING IN PAMIS

SEARCH DISPLAY

In either Secure or Non-secure mode a number of options in searching for awards is available:

**PAMIS Award Number** – has a “contains” feature to search on a portion of the PAMIS Award Number, (i.e. first six digits of the PAMIS Award Number, ex. 000123). This feature allows viewing of all award increments/modifications related to a PAMIS Award Number.

**Sponsor Award Number** – has a “contains” feature to search on a portion of the Sponsor Award Number, (i.e. EAR-0203855-002). This feature allows viewing of all award increments/modifications related to a Sponsor Award Number.

**Fund Code** – Search for all award increments/modifications related to a particular Fund number.

**Award Status** – Search for any/all award(s) based on the options available in the pull down menu (Active, Terminated, Closed)

**PI Name** – Search for all awards for a particular PI and/or Co-PI.

**Agency Name** – Search for all awards from a particular sponsor.

**UCR Activity Code** – Search for all awards within your Activity Code.

**Award Activation Date** – Search for awards activated within a specific period, based on the Month/Year the award was activated.

**Award Amount** – Search for an award based on award amount. **Options:** < (less than); <= (less than or equal to); = (equal to); >= (greater than or equal to); > (greater than).

**View ORA/Manual Records** – Provides a list of records that were processed manually and includes notes describing the reason for the transaction. Possible reasons are - This award was processed manually prior to this version of PAMIS; the award must be processed outside of PAMIS through an Interlocation Transfer of Funds due to funding source (e.g. General Funds; Endowments, UCDRD).
**Secure Access**

Secure access provides access to the Notice of Award (NOA), Fund Information, BEA Information and Status of Award, as well as access to the Scanned Documents.

**Non-Secure Access**

Non-secure access allows viewing of the Notice of Award (NOA), Fund Information, BEA Information and Status of Award. It does not provide access to the Scanned Documents.

*The following pages provide examples of the Fund Information, NOA Information, BEA Information, and Status of Award Displays within non-secure access and also the Scanned Documents Display within secure access.*
VIEW ORA/MANUAL RECORDS

This selection may be accessed in either secure or non-secure mode. From the Search Display (see page 6), select the View ORA/Manual Records button for the list of records processed outside of PAMIS. When a record is selected while in secure mode you can click on the award number and view the Notes provided. When a record is selected while in non-secure mode you will be prompted to login prior to viewing Notes.

The following is a sample of the ORA/Manual Records display.

<table>
<thead>
<tr>
<th>Award Number</th>
<th>Seq Number</th>
<th>Date</th>
<th>Notes</th>
<th>Attribute Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000-0000</td>
<td>110-JAN-00</td>
<td>Jan 10</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00001-0001</td>
<td>110-JAN-00</td>
<td>Jan 11</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00002-0002</td>
<td>110-JAN-00</td>
<td>Jan 12</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00003-0003</td>
<td>110-JAN-00</td>
<td>Jan 13</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00004-0004</td>
<td>110-JAN-00</td>
<td>Jan 14</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00005-0005</td>
<td>110-JAN-00</td>
<td>Jan 15</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00006-0006</td>
<td>110-JAN-00</td>
<td>Jan 16</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00007-0007</td>
<td>110-JAN-00</td>
<td>Jan 17</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00008-0008</td>
<td>110-JAN-00</td>
<td>Jan 18</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00009-0009</td>
<td>110-JAN-00</td>
<td>Jan 19</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00010-0010</td>
<td>110-JAN-00</td>
<td>Jan 20</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00011-0011</td>
<td>110-JAN-00</td>
<td>Jan 21</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00012-0012</td>
<td>110-JAN-00</td>
<td>Jan 22</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00013-0013</td>
<td>110-JAN-00</td>
<td>Jan 23</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00014-0014</td>
<td>110-JAN-00</td>
<td>Jan 24</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00015-0015</td>
<td>110-JAN-00</td>
<td>Jan 25</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00016-0016</td>
<td>110-JAN-00</td>
<td>Jan 26</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00017-0017</td>
<td>110-JAN-00</td>
<td>Jan 27</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00018-0018</td>
<td>110-JAN-00</td>
<td>Jan 28</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00019-0019</td>
<td>110-JAN-00</td>
<td>Jan 29</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
<tr>
<td>00020-0020</td>
<td>110-JAN-00</td>
<td>Jan 30</td>
<td>This award was processed manually prior to the version of PAMIS.</td>
<td>MANUAL</td>
</tr>
</tbody>
</table>

The following is a sample of the ORA/Manual Records display.
FUND INFORMATION

This Fund Information selection may be accessed, in either secure or non-secure mode, to view the Fund attributes available in PAMIS. From the Search Results Display (see page 7), the Fund Information may be accessed by selecting Fund under the View option. This will open a new web display of the Fund Information for the award selected. To return to the Search Results Display, click X in the top right corner and the previous screen (Search Results Display) will again be displayed.

FUND INFORMATION DISPLAYS (partial screen)

<table>
<thead>
<tr>
<th>Fund Common Attributes</th>
<th>Office of the President</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund Type: Current</td>
<td>Record Type: F</td>
</tr>
<tr>
<td>Category: Federal Grants</td>
<td>Major Location: 05</td>
</tr>
<tr>
<td>Budgeted Code: Non-Budgeted</td>
<td></td>
</tr>
<tr>
<td>Restriction Code: Restricted</td>
<td></td>
</tr>
<tr>
<td>Fund Group: Federal Grants</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Award Information</th>
<th>Project Title Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date: 03/01/2004</td>
<td>Study of the Endangered African Purple Toad</td>
</tr>
<tr>
<td>End Date: 05/30/2004</td>
<td></td>
</tr>
<tr>
<td>Sponsor Award #: DEB-0438988</td>
<td></td>
</tr>
<tr>
<td>Agency Name: US NSF</td>
<td></td>
</tr>
<tr>
<td>Pre-Award: Yes</td>
<td></td>
</tr>
<tr>
<td>Federal Base Project:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Extramural Fund Information</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal MSP:</td>
<td>Off Campus</td>
</tr>
<tr>
<td>Sponsors Code:</td>
<td>Letter of Credit</td>
</tr>
<tr>
<td>Sponsors Category:</td>
<td>Final</td>
</tr>
<tr>
<td>Type of Award:</td>
<td>Direct Federal</td>
</tr>
<tr>
<td>Paid From/Third Code:</td>
<td>Indirect Cost</td>
</tr>
</tbody>
</table>
The Notice of Award (NOA) Information selection may be accessed, in either secure or non-secure mode, to view the NOA available in PAMIS. From the Search Results Display (see page 7), the NOA Information may be accessed by selecting NOA under the View option. This will open a new web display of the Notice of Award Information for the award selected. To return to the Search Results Display, click X in the top right corner and the previous screen (Search Results Display) will again be displayed.

NOTICE OF AWARD INFORMATION DISPLAY (partial display)
STATUS OF AWARD

This Status of Award selection may be accessed, in either secure or non-secure mode, to view the status of key events related to a selected award. From the Search Results Display (see page 7), the Status of Award Display may be accessed by selecting the PAMIS award number under the Award Number option. This will open a new web display of the Status of Award for the award selected. To return to the Search Results Display, click X in the top right corner and the previous screen (Search Results Display) will again be displayed.

STATUS OF AWARD DISPLAY

The display above is created when an award is activated by ORA and notification of the award (E-mail #1, see page 3) is sent to the PI, CoPIs, Transactor, Accounting, and Courtesy Copies. As the establishment of the award progresses, notification will be sent to the Transactor that the Fund has been established and the department may submit the BEA (E-mail #2, see page 21). Once the BEA is submitted, it will post to UCRFS overnight and the funds will be available for expenditure (E-mail #3, see page 23). The process is recorded and tracked on the Status of Award Display as the activities are completed. The date each activity was completed is also provided.
BEA INFORMATION

This BEA Information selection may be accessed, in either secure or non-secure mode, to view the BEA for a selected award. From the Search Results Display (see page 7), the BEA Information Display may be accessed by selecting BEA under the View option. This will open a new web display of the BEA Information for the award selected. To return to the Search Results Display, click X in the top right corner and the previous screen (Search Results Display) will again be displayed.

BEA INFORMATION DISPLAY (partial display)
SCANNED DOCUMENTS

Viewing of Scanned Documents is allowed in secure access only.

From the Search Results Display (see page 7), you may access the Scanned Documents Display by clicking on the document icon under the Documents option. This will open a new web display, which will provide access to the documents that have been scanned and uploaded into PAMIS. Click on the document description you wish to view and a PDF version of the selected document will be displayed in Adobe Acrobat. Once access to the selected documents is no longer needed, close Acrobat and return to the Search Results Display.

SCANNED DOCUMENTS DISPLAY

On the Search Results Display this document icon, under the Documents option may also be displayed. This will open a new web display, which will provide access to multiple award documents from previous years and/or Master Agreement that have been scanned and uploaded into PAMIS. Click on the document description you wish to view and a PDF version of the selected documents will be displayed.
Award Date: June 15, 2004
Award No. DEB-0488888
Proposal No. DEB-0488888

Ms. Nancy Nisbett
Director of Sponsored Projects
University of California, Riverside
Office of Research Affairs
200 University Office Building
Riverside, CA 92521-0217

Dear Ms. Nisbett:

The National Science Foundation hereby awards a grant of $232,004 to University of California, Riverside for support of the project described in the proposal referenced above.

This project, entitled “Study of the Endangered African Purple Toad,” is under the direction of Jim Nasium and Annie O. Klee, Department of Biology.

This award is effective July 1, 2004 and expires June 30, 2005.

This is a continuing grant which has been approved on scientific/technical merit for approximately 3 years. Contingent on the availability of funds and the scientific progress of the project, NSF expects to continue support at approximately the following level:

<table>
<thead>
<tr>
<th>FY 2005</th>
<th>FY 2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$232,004</td>
</tr>
<tr>
<td></td>
<td>$232,004</td>
</tr>
</tbody>
</table>

This grant is awarded pursuant to the authority of the National Science Foundation Act of 1950, as amended (42 U.S.C. 1861-75) and is subject to Federal Demonstration Partnership General Terms and Conditions (FDP-IV, dated 10/02) and the NSF Agency-Specific Requirements (dated 10/02).

The attached budget indicates the amounts, by categories, on which NSF has based its support.

The cognizant NSF program official for this grant is N. L. Hannah, (703) 123-4567. The cognizant NSF grants official contact is Lynn H. Nichols, (703) 123-8789.

Sincerely,

Henry L. Linfield
Grants and Agreements Officer

CFDA No. 47.074
awards@ucract.ucr.edu
CREATE A PAMIS BEA

Log in to PAMIS for secure access to the system. A screen similar to the one below will be displayed.

To create a BEA, the transactor will select *Department/BEA*

This screen will be bypassed upon login by the Prime PI & Co-PIs.
CREATE A PAMIS BEA

When Department/BEA is selected the window below will be displayed. The Award Numbers listed here are those awards with an ACTIVE status for the department activity code associated with the transactor that require a PAMIS BEA to be created for submission to UCRFS. The transactor completes the BEA by filling in the amounts for each budget category based upon the approved award budget. Transactor will receive a warning message if the Total Direct Costs and F&A (Indirect) Costs do not match the amounts recorded in PAMIS. The activity, fund, and function are fixed data fields and cannot be changed. If the activity and/or function information is incorrect, contact ORA by clicking on the link provided—do not submit the BEA for processing at this time. ORA will correct their database (COEUS) as appropriate and resubmit the information to PAMIS. Verify the information is correct before submitting the BEA. Questions regarding the fund number should be directed to Extramural Funds Accounting.

NOTE: The BEA can be created when E-mail #1 (Notice of Award) is received – or – by waiting until E-mail #2 (fund created) is received and the Submit BEA button is available.
**Budgetary Breakdown** (provided in two parts)

The upper portion of this window displays overview details of the Award. Transactor cannot modify information in this area. Contact ORA prior to completing BEA if you encounter an error in any of the fields.

The lower portion of this window includes a list of budget categories for distribution of the award amount.

Reminder: Transactor will receive a **warning message** if the Total Direct Costs and F&A Indirect Costs are not equal to amount provided in the upper portion. Please contact ORA if you require assistance with TDC & IDC.

### Link to e-mail ORA with request for correction to Activity &/or Function Code.

### Notice:

- Some amounts listed may be incomplete due to the award being a foreign award, or the work being performed by subcontractors.
- Amounts may be adjusted due to pending changes in the award, or budget adjustments.

### Budget Category / Description

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Salaries</td>
<td>Graduate Students, TA's</td>
<td>Post Grad Res, Acad Summer</td>
<td>Benefits - Academic</td>
<td>Benefits - Acad OH excl</td>
<td>Staff Appointments</td>
<td>Benefits - Staff</td>
<td>Travel</td>
<td>Supplies &amp; Materials</td>
<td>Services, Other</td>
<td>Mail Services / Freight</td>
<td>Printing / Repro &amp; Media</td>
<td>Communication</td>
<td>Computing</td>
<td>Other, S&amp;E</td>
<td>Student Aid</td>
<td>Equipment + $1,500 or greater</td>
<td>Subcontracts</td>
<td>Sub-Contracts - O/H excl</td>
</tr>
</tbody>
</table>

### Category Subtotals for ORA

<table>
<thead>
<tr>
<th>salaries</th>
<th>benefits</th>
</tr>
</thead>
</table>

*Note: Amounts attributed to BC35 will correspond to Financial Aid's activity for undergraduate students and Graduate Assistant's activity for graduate students with funding codes 77, 78 or 79.

*Note: Accounting remains to approximate unpresented narrative account.
### Budgetary Breakdown (provided in two parts)

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC30 - Student Aid</td>
<td>Provided in two parts</td>
<td>*Note: Amounts allocated to BC30 will appear under Financial Aid's</td>
</tr>
<tr>
<td></td>
<td></td>
<td>activity for undergraduate students and Graduate Division's activity for</td>
</tr>
<tr>
<td></td>
<td></td>
<td>graduate students with function code 77, 78, or 79.</td>
</tr>
<tr>
<td>BC30 - Equipment - $1,500 or greater</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC35 - Subcontracts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC36 - Sub-Contracts - O/H excl</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC37 - Sub-Contracts - Intercampus **</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC70 - Facilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC75 - Unallocated General</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>*Note: Accounting standards is appropriate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>unexpended Balance amount</td>
</tr>
<tr>
<td>BC30 - F&amp;A Indirect Costs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Save as WIP** – Save as Work in Progress, does not check the business rules for appropriate distribution of funds.

**Save for Submission** – Saves work as ready to submit once fund attributes have been assigned and checks business rules for appropriate distribution of funds.

**Back** – returns you to the previous page.

To complete the transaction, save as WIP or save for Submission. This will return you to the Results Grid, where you may preview the BEA. If the Submit BEA button is available, then you may submit the BEA.
BEA EDIT CHECK

The PAMIS BEA checks the Budget Category Breakdown to verify that the total direct costs and indirect cost allocations agree with the agency approved budget direct and indirect totals (as entered by ORA) appearing in the PAMIS BEA header information. When the "Save for Submission" button of the PAMIS BEA is selected, and passes all business rules, a Submit BEA message will display.

Sample Submit BEA Message

Warning! The direct and indirect costs do not match the dollar amounts entered by the Office of Research Affairs (ORA) for this award. This deviation from the agency approved budget may be considered rebudgeting. Please check the award terms & conditions and obtain necessary approvals before proceeding. If the direct and indirect cost amounts listed in the header are not correct, please contact ORA.
BEA EDIT CHECK

Entries may appear on the Department/BEA grid with no corresponding “Submit BEA” button. This occurs when the Fund attributes have not been assigned in UCRFS. At anytime after the award is activated and the Notice of Award is processed (E-mail #1) the PAMIS BEA may be created and saved as WIP (e.g. work in progress, still finalizing amounts) or saved for submission (e.g. budget category breakdown complete and passes business rules). The PAMIS BEA cannot be submitted for posting to UCRFS until the “Submit BEA” button is available.

When the fund attributes are populated in UCRFS, the “Submit BEA” button is activated and the departmental transactor receives an e-mail notification (E-mail #2). Prior to submitting the PAMIS BEA you can Preview the BEA by selecting Preview to view the specific journal lines that will be created once the BEA is submitted.

When the “Submit BEA” button is selected, the Budget Category Breakdown is again checked to verify that the total direct costs and indirect cost allocations agree with the agency approved budget direct and indirect totals (as entered by ORA). If a discrepancy is detected between the agency approved budget and the Budget Category Breakdown, a warning message will displayed with two buttons, "Continue" means that the user wants to go ahead and Submit BEA or "Back" would be selected if the user wants to go back and make further adjustments before submitting.

Sample Warning! Message – Submit BEA
SUBMIT BEA

The sample below is an example of the Submit BEA notification, which will be sent when the Fund attributes have been assigned by Accounting and the PAMIS BEA “Submit BEA” button is activated. Once the budget category breakdown is finalized and passes the on-line business rule check, the PAMIS BEA can be submitted. The system returns a message that the PAMIS BEA has been successfully submit and provides a journal identification number (Journal ID). This Journal ID will now appear when viewing a BEA in PAMIS under the header information “PAMIS BEA #”. Once the PAMIS BEA is submitted and the Journal ID is created, it cannot be modified in PAMIS or UCRFS.

Note: The PAMIS BEA uses a journal date of either the PAMIS BEA submission date or the award start date, whichever is the later date. PAMIS BEAs with future begin dates will not post until that date. In addition, the PAMIS Award Allocation (E-mail #3) will not be sent until the PAMIS BEA posts.

SAMPLE SUBMIT BEA NOTIFICATION (E-mail #2)

Date: Wed, 10 Mar 2004 15:56:11 -0800
From: PAMIS WebMaster
Reply-To: NOREPLY@ucr.edu
To: TRANSACTOR@ucr.edu
Subject: UCRFS Fund 21650; PAMIS Award Number 001233-002; PI Name Jim Nasium

UCRFS Fund 21650 has been established for PAMIS Award 001233-002. Please take one of the following actions:

1. If the budget category breakdown for this award has already been created, please log into PAMIS (http://pamis.ucr.edu) under Department/BEA and click on the Submit BEA button for this award.

2. If the budget category breakdown for this award has not been created, please log into PAMIS (http://pamis.ucr.edu) under Department/BEA and click on the award number to generate the budget category breakdown. Once the breakdown is complete, save and click on the Submit BEA button.

Please note: The Submit BEA button will create a PAMIS BEA in UCRFS. Depending upon the award start date, the BEA should appear on the ledgers the following day.

For further information please contact Cynthia Parish by phone at 8-5535 or by e-mail at cynthia.parish@ucr.edu

This is an automatically generated message.
Do not use the "REPLY" button
as your message will not be received and will
be returned to you by the mail server.

cc:
Transactor@ucr.edu
CHECK STATUS OF AWARD AFTER BEA SUBMISSION

Utilizing either secure or non-secure access, click on Award Information to access the Search Display and search for specific award information. From the Search Results Display (see page 7), the Status of Award Display may be accessed by selecting the PAMIS award number under the Award Number option. This will open a new web display of the Status of Award for the selected award. To return to the Search Results Display, click X in the top right corner and the previous screen (Search Results Display) will again be displayed.

Award 001233-002 (1)

Fund 21650

1. Award Received on 02/15/2004
2. Award Activated on 02/26/2004
3. Fund Established on 03/02/2004
4. PAMIS Budget Submitted on 03/04/2004
5. Funds Available on N/A

As each key event occurs in PAMIS it is charted for viewing under Award Information. The above award indicates that four of the five key events have occurred. Once the PAMIS BEA posts (usually an overnight process once it is submitted), the funds will be available for expenditure, the entire grid will be completed, and E-mail #3 will be sent.

Award Received on – date award received in ORA.

Award Activated on – dated award is activated by ORA and E-mail #1 is sent.

Fund Established on – date E-mail #2 is sent that Accounting has assigned the fund attributes/fund #.

PAMIS Budget Submitted on – date department submits BEA to UCRFS.

Funds Available on – date funds posted and available in UCRFS. E-mail #3 is sent.
Notification of BEA Posting to UCRFS

When the BEA is submitted to UCRFS, it usually posts overnight and funds are available for expenditure. The PAMIS Award Allocation Notification (E-mail #3), informs the PI and Department that the PAMIS Award Allocation process is complete and the funds are available for expenditure.

Note: The PAMIS BEA uses a journal date of either the PAMIS BEA submission date or the award start date, whichever is the later date. PAMIS BEA’s with future begin dates will not post until that date. In addition, the PAMIS Award Allocation (E-mail #3) will not be sent until the PAMIS BEA posts.

SAMPLE PAMIS AWARD ALLOCATION NOTIFICATION (E-mail #3)

Date: Wed, 17 Mar 2004 7:59:52 -0800
From: PAMIS WebMaster
Reply-To: NOREPLY@ucr.edu
To: TRANSACTOR@ucr.edu
Subject: PAMIS Award Allocation

Principal Investigator: Jim Nasium
Department: Biology (A01081)
FAU Fund: 21650 Activity: A01081 Function: 44
Agency: NATIONAL SCIENCE FOUNDATION
Agency Award No: DEB-0488888
Award Amount: $232,004.00
Effective Dates: 07/01/2004 through 06/30/2005
PAMIS Award No: 001233-002
BEA (Allocation) Journal ID: 0000123456

This e-mail serves as notification that the above referenced award has been accepted on behalf of the University. The effective date for incurring expenditures/commitments is the beginning date specified in the award.

Expenditures must be classified under the appropriate expense accounts. Please use the FAU coding assigned to this award on requisitions, payroll, travel or other items chargeable to these funds.

Responsibility for adherence to the terms (including expiration date) and budget control in the expenditure of funds provided rests with the Principal Investigator. Please note that appropriations and expenditures incurred must be in accordance with University procedures and the awarding agency terms. The title to all supplies, books and/or equipment purchased with funds from this award rests with either the University or the agency.

Sincerely,
Mark Carr
Extramural Funds Manager

This is an automatically generated message. Do not use the "REPLY" button as your message will not be received and will be returned to you by the mail server.

cc:
PrimePI@ucr.edu
CourtesyCopy@ucr.edu
Transactor@ucr.edu
Accounting@ucr.edu
EquipMgmt@ucr.edu