

Post Award Management - How to Access, Navigate, and Read a PAM Record

Finalized: 11-26-2025

**Revisions of this document will be released as future functionality becomes available.*

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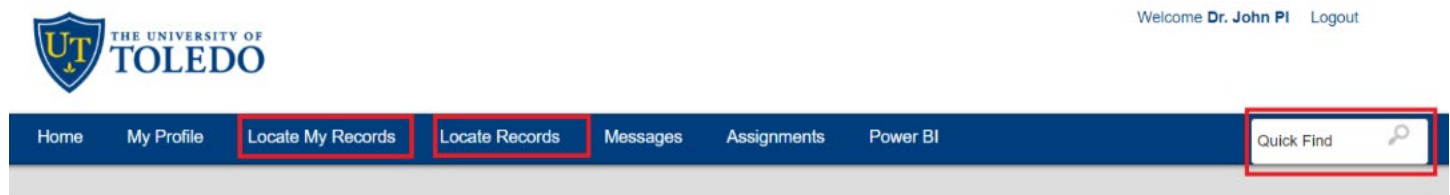
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Types of Information Found in a PAM Record

- Basic Record Details
 - Record Number
 - Title
 - Sponsor
 - PI Name
 - PI Department
 - Project Start and End Dates
 - Grants Analyst
- Awarded Budget Period Activity Record
- No Cost Extension Activity Record
- Award Documents
 - Notice of Award
 - Award Compliance Checklist
 - Contracts and Agreements
- Master Record Status (e.g. Initiated, Active, Closed)
- Activity Record Status (e.g. In Setup, Active)

Locating Records

Three mechanisms allow users to locate records. See below for a brief overview. For a comprehensive review, see the help guide ***Locating a Record in InfoEd*** on the InfoEd Resources web page.



Locate My Records

Allows the user to find any records they “own”. In the context of awards, the record owner is the PI.

Locate Records

Allows the user to apply filters to find records for which the user has permissions. If the user has a role on a record other than PI, “Locate Records” can be used to find that record. Department admins and chairs and college deans have access to records containing personnel from their departments or colleges.

QuickFind

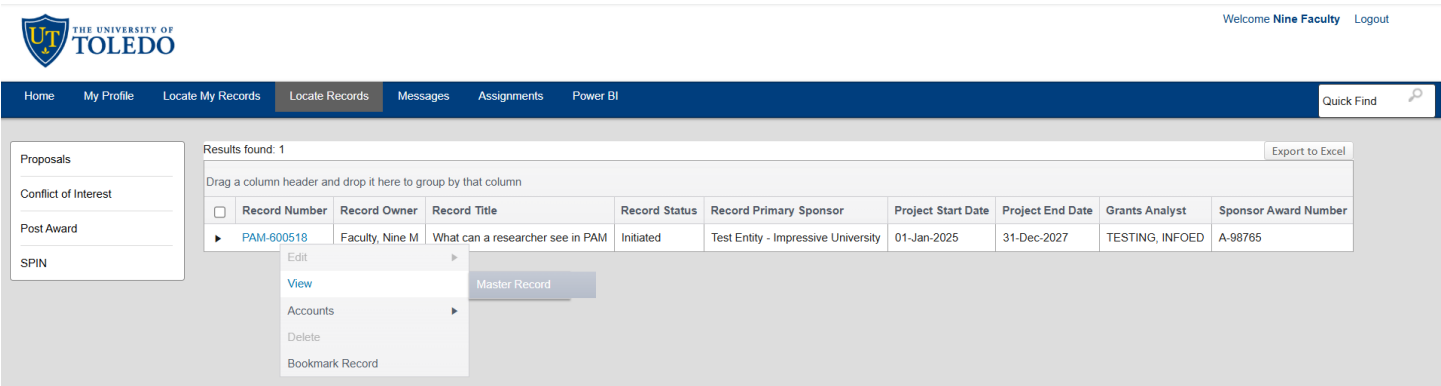
Allows the user to type in a string of characters (minimum of 3 characters needed) to search by record owner, record title, or record number. Records returned have the string of characters in one of those three fields. Only those records that the logged in user has access to will display in the returned results.

PAM Record Navigation and Structure

Opening the Record

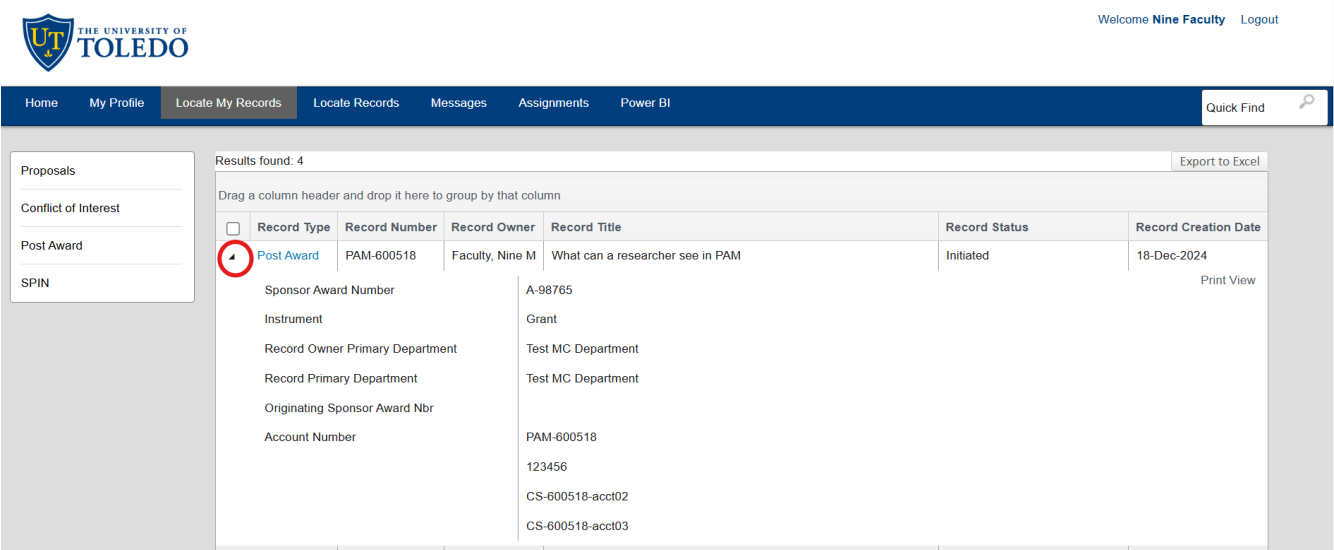
Fly Out Menu

Click on the desired Post Award record number (PAM-6XXXXX) to see the fly out menu. The record will be available in View only. Hover over View to see Master Record and then click on Master Record to open.



Expansion Sub Menu

Click on the triangle to the left of the record number to expand the display, including details such as Sponsor Award Number, Originating Sponsor Award Number, and Account Number. The Account Number field in the expansion menu may include Grant ID (PAM-6XXXXX), Banner Index number (six-digit number with no prefix, XXXXXX) and Cost Share account numbers (CS-XXXXXX-acct0X).



Record Structure

**PAM-600518 - Nine M Faculty M.D. - Test MC Department (Test Entity
- Impressive University)**

What can a researcher see in PAM

You have opened this record in view mode

Post Award	Summary
Summary ▲ Award Attributes Award Activity (4) ▼ Attachments (5) ▼ Terms & Conditions	Title What can a researcher see in PAM

Principal Investigator *	Department *
Nine Faculty	Test MC Department
Institution Number *	Award Date

PAM Management Record Contents

Summary Menu Item

Summary Section

<

Title: This is the title of the project.

Principal Investigator: This is the current PI.

Department: Shows the primary department the current PI is associated with.

Institution Number (PAM-6XXXXX): This is the institutional record identifier for this award (not to be confused with Index or Fund number).

Award Date: This is generally the date of the award as indicated in the Notice of Award (not to be confused with project start date or start date for a specific Budget Period or No Cost Extension).

Start Date and End Date: This date range reflects the full span of the project.

Document Number: Not in use at this time.

Status (of the Management Record): This status reflects the overall award status and will say “Initiated” for awards being processed, “Active” for currently active awards, and “Closed” for awards that are closed. This status will not change often and does not reflect the status of an individual Award Activity.

Funding Sources Section

This section provides an at-a-glance view of Funding Source data. This data is for display only and contains limited information. For full details regarding funding sources, including budget data, see other sections of the PAM or PT (Proposal Tracking) record.

Source/Charge To/Short Name: This is a summary table of the sources of funding applicable to the award and includes Sponsor, Inst (Institution), and Unallowable with additional sources when applicable. This table does not reflect the dollar amounts attributed to individual sources.

Funding Sources		
Source	Charge To	Short Name
SRC 1	Test Entity - Impressive University	Sponsor
SRC 2	Test MC Department	Inst
SRC 3	Test MC Department	Unallowable

Number (P-6XXXXX)/Sponsor/Title/Status: The link in the Number column opens the associated Proposal Tracking (PT) record. This table also displays proposal Sponsor, Title, and Status.

Number	Sponsor	Title	Status
P-600518	Test Entity - Impressive University	What can a researcher see in PAM	Submitted

Type/Date/Sponsor/Institution/Total: This is a summary table of the currently created activities associated with this award such as Budget Period and No Cost Extension.

Type	Date	Sponsor	Institution	Total
Budget Period	18-Dec-2024	\$70,014	\$14,040	\$84,054
Budget Period	18-Dec-2024	\$69,990	\$14,320	\$84,310
Budget Period	18-Dec-2024	\$71,351	\$14,578	\$85,929
No Cost Extension	02-Oct-2025	\$0	\$0	\$0
Total		\$211,355	\$42,938	\$254,293

Summary (at the bottom of the screen)

This section displays the name of the Grants Analyst for this award. Clicking on the hyperlinked name opens a screen with limited contact information. All other fields listed here are for office use only.

Summary

Grants Analyst

[Archer, Jeremy R]

Change

Clear

Contract Budget Cash

No

GA Only Record?

No

GA Only - Award Activity Type

GA Only - Research Type

GA Only - NSF Category

Originating Sponsor Award Nbr

Banner Subcategory

Award Attributes Menu Item

This menu item displays certain details about the project. Most of the data here comes from the Proposal Tracking (PT) record from the Setup Questions screen. Not all data fields are used.

Post Award

Summary

Award Attributes

Award Activity (4)

Attachments (5)

Terms & Conditions

Award Attributes

Campus

☐ On ☐ Off

Proposal Attributes

☐ PHS/NIH

☐ NIH Phase III Clinical Trial

☐ Stem Cells

☐ Multiple PI

☐ Human Subjects

☐ NIH Modular Budget

☐ Clinical Trial

☐ Training Grant

☐ Lab Animals

Cost Share Type

☐ Voluntary Committed ☐ Mandatory ☐ Mandatory and Voluntary Committed ☐ None

Sponsor *

Test Entity - Impressive University

Originating Sponsor *

Test Entity - Impressive University

Sponsor Type

Higher Education (US)

Originating Sponsor Type

Higher Education (US)

Sponsor/Agency Code

Recovery

Opportunity Number

Limited Submission

☐ Yes ☐ No

Assistance Listing

Activity Description

Program Type

HSC Organized Research

Instrument Type

Grant

Sponsor Ind.

FAIN

Sponsor Award Number

A-98765

% Federal

Funding Source

Short Title

Proposal Type

New

Program

Special Requirements

Load Sponsor Profile

Sponsor Contact

Project Officer

Grant/Contract Officer

Billing Officer

Award Activity Menu Item

This menu item opens on a screen with a summary table of all activities currently created in this award. This is an at-a-glance view of certain details of each activity. For more information about each activity, click into the activity itself as explained in the Award Activity section.

Post Award

Summary

Award Activity (4)

Budget Period / / 1

Budget Period

Budget Period

No Cost Extension

Attachments (5)

Terms & Conditions

Award Activity

Represents the sum of sponsor direct costs, F&A, and any applicable cost share.

Activity ID	Award Date	Activity Type	Status	Start Date	End Date	Amount	Published	Edit
	19-Dec-2024	Budget Period	In Setup	01-Jan-2025	31-Dec-2025	\$ 84,054.36	03-Sep-2025	
	19-Dec-2024	Budget Period	Activity started	01-Jan-2026	31-Dec-2026	\$ 84,309.88		
	19-Dec-2024	Budget Period	Activity started	01-Jan-2027	31-Dec-2027	\$ 85,929.46		
	02-Oct-2025	No Cost Extension	In Setup	01-Jan-2025	30-Jun-2028	-	02-Oct-2025	

Attachments Menu Item

The Attachment menu item at the Management Record level shows all attachments in the PAM record. Clicking on the name of the attachment will download the file. Attachments can also be viewed at the associated Award Activity level. For example, the Notice of Award for Budget Period / 1 will be available at both the Award Activity record level for Budget Period / 1 and at the Management Record level. Types of attachments may include:

- Annual Compliance Checklist - displays compliance-related documentation regarding:
 - Data Verification
 - Regulatory Compliance Checks
 - Conflict of Interest Review
 - Grant Congruency
 - Contractual Requirements (future functionality)
- Notice of Award – contains sponsor-determined details related to the award such as but not limited to:
 - Terms & Conditions
 - Awarded Amount
 - Award Start and End Dates
- Additional documents related to contracts and/or agreements

Post Award

Summary

Award Activity (4)

Attachments (5)

Award Compliance Ch...

Award Compliance Ch...

Award Compliance Ch...

Demo Notice of Award

Organization Hierarchy...

Terms & Conditions

Attachments

Add Document

Combine

Email

Submit

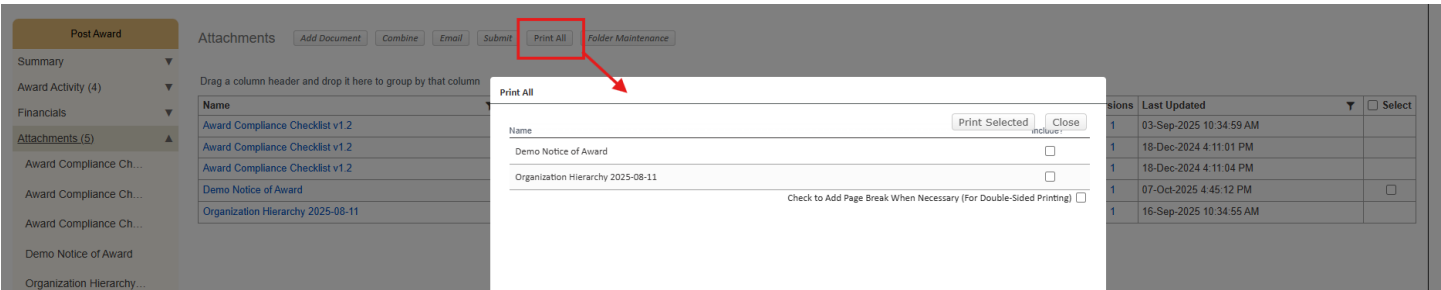
Print All

Folder Maintenance

Drag a column header and drop it here to group by that column

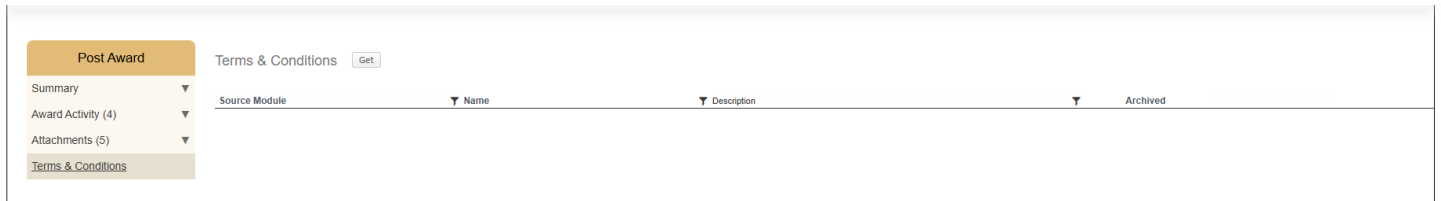
Name	Category	Folder	Managed By	Submission	Versions	Last Updated	Select
Award Compliance Checklist v1.2	Other	ROOT	Submission Package	Budget Period	1	03-Sep-2025 10:34:59 AM	
Award Compliance Checklist v1.2	Other	ROOT	Submission Package	Budget Period	1	18-Dec-2024 4:11:01 PM	
Award Compliance Checklist v1.2	Other	ROOT	Submission Package	Budget Period	1	18-Dec-2024 4:11:04 PM	
Demo Notice of Award	Notice of Award	ROOT	Record	Record	1	07-Oct-2025 4:45:12 PM	<input type="checkbox"/>
Organization Hierarchy 2025-08-11	Other	ROOT	Record	Budget Period	1	16-Sep-2025 10:34:55 AM	

Note: The Print All button opens a screen with a list of the uploaded documents for this record. Selected documents will be converted to PDF, which can then be saved or printed as needed.



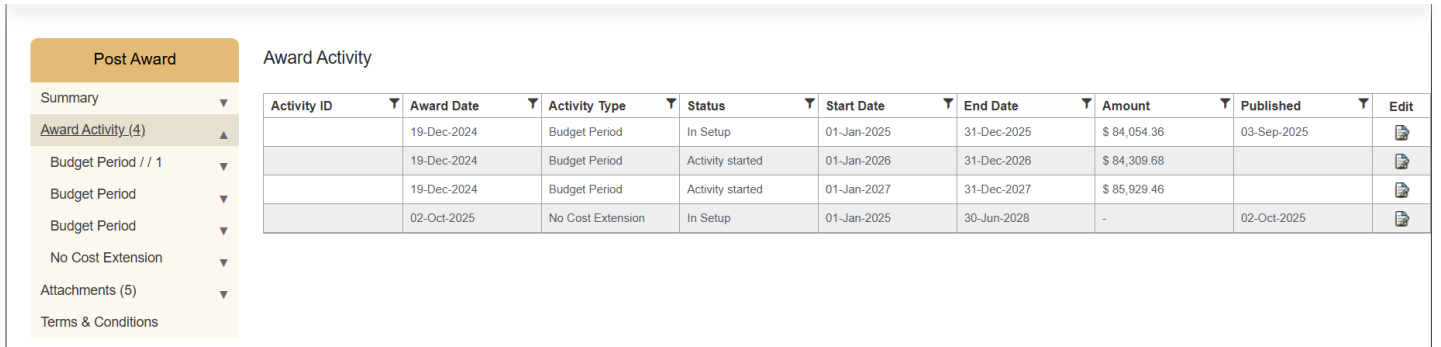
Terms & Conditions Menu Item

Any terms and conditions included in the PAM record are **SELECT** terms and conditions meant to call attention to high-level or particularly significant items and ***are NOT an exhaustive list of all applicable terms and conditions associated with the award. To see full terms and conditions that the PI is responsible for, refer to the Notice of Award document.***



Award Activity Record Navigation

Click on the Award Activity menu item for the list of activities for this award. Enter the desired activity either by clicking the icon in the far right Edit column or by expanding the desired activity in the left menu and clicking on items in the sub menu.



In the Award Activity sub menu, clicking on any tab other than the Award Compliance Checklist will navigate away from the Management Record and open the activity-specific record. ***Being in the activity-level record is indicated by a subheading under the “Post Award” heading in the navigation menu***

(see red rectangle in the screen shot below). Once inside an activity-specific record, click Management Record at the bottom of the navigation menu to return to the Management Record level.

The screenshot shows the PAM interface. On the left is a navigation menu with items: Post Award, Budget Period (highlighted with a red rectangle), Award Compliance Chec..., General, Terms & Conditions, Status History, Attachments (2), and Management Record (indicated by a red arrow). The main content area displays 'Publish View Snapshot' with a timestamp '03-Sep-2025 11:02 AM'. Below this is a 'Title' field containing 'What can a researcher see in PAM'. Further down, there are fields for 'Principal Investigator *' (Nine Faculty) and 'Department *' (Test MC Department).

Award Activity Record Contents

The Award Activity menu item contains a list of the activity records currently associated with this PAM record such as Budget Period or No Cost Extension. Award Activity records contain some record-specific screens and some screens common to most activities such as General, Terms & Conditions, Status History, Attachments, and Management Record. **Content of Award Activities is temporarily limited. Revisions of this document will be released as future functionality becomes available.**

Award Compliance Checklist

This screen is available in the Budget Period activity menu and contains the compliance checklist for this particular activity. The Award Compliance Checklist can also be viewed at the Management Record level under Attachments.

The screenshot shows the 'Award Compliance Checklist v1.1' screen. On the left is a navigation menu with items: Post Award, Budget Period (highlighted with a red rectangle), Award Compliance Checklist v1.1, General, Terms & Conditions, Status History, Attachments (1), and Management Record. The main content area features the 'infoEd GLOBAL' logo and a header 'Award Compliance Checklist v1.1'. Below the logo is a table with tabs: CHECKLIST, DATA VERIFICATION, REGULATORY COMPLIANCE CHECKS, CONFLICT OF INTEREST REVIEW, GRANT CONGRUENCY, CONTRACTUAL REQUIREMENTS, and ALL PAGES. The 'CHECKLIST' tab is active, displaying 'General Instructions/Notes' and a text area for 'Comments that should be presented to the Researcher prominently:'. At the top right of the main content area are buttons for 'Close', 'Print', 'Form History', 'Save', and 'Complete' (with a checkbox).

General

This screen displays general information about this activity. See below for screen shots of a Budget Period General screen and a No Cost Extension General screen.

Budget Period General Screen

Post Award

Budget Period

Award Compliance Chec...

General

Terms & Conditions

Status History

Attachments (1)

Management Record

Title

R01 where UT is not prime

Principal Investigator *

HSC Faculty

Sponsor *

Test Entity - Impressive University

Project Start Date

15-Sep-2025

Type

Budget Period

Document Number

Instrument Type

Period Start Date

15-Sep-2025

Activity ID Field

Department *

Test HSC Department

Originating Sponsor

National Institutes of Health/NIH

Project End Date

14-Sep-2030

Activity Award Number

1234567890

Assistance Listing

Activity Award Date

29-Jul-2025

Period End Date

14-Sep-2026

Number	Sponsor	Title	Status
P-600224	Test Entity - Impressive University	R01 where UT is not prime	Submitted

Budget Version	Date	Sponsor	Institution	Total	Final
1 (edit)	29-Jul-2025	176,744.00	0.00	176,744.00	<input checked="" type="checkbox"/>

Submission Detail

No Cost Extension General screen

Post Award

No Cost Extension

General

Terms & Conditions

Status History

Attachments (0)

Management Record

Publish View Snapshot

02-Oct-2025 4:25 PM

Title

What can a researcher see in PAM

Principal Investigator *

Nine Faculty

Sponsor *

Test Entity - Impressive University

Project Start Date

01-Jan-2025

Type

No Cost Extension

Document Number

Instrument Type

Grant

Period Start Date

01-Jan-2025

Department *

Test MC Department

Originating Sponsor

Test Entity - Impressive University

Project End Date

31-Dec-2027

Activity Award Number

123456

Assistance Listing

Activity Award Date

02-Oct-2025

Period End Date

30-Jun-2028

Activity ID Field

Number	Sponsor	Title	Status
P-600518	Test Entity - Impressive University	What can a researcher see in PAM	Submitted

Budget Version	Date	Sponsor	Institution	Total	Final
No budget (or versions of budgets) exist					

Submission Detail

Terms & Conditions

This screen contains a list (if applicable) of **SELECT** terms and conditions related to this Award Activity. This list is meant to call attention to high-level or particularly significant terms and conditions and **is NOT an exhaustive list of all applicable terms and conditions associated with the award. To see full terms and conditions that the PI is responsible for, refer to the Notice of Award document.**

Post Award
Budget Period

Award Compliance Checklist v1.2

General

Terms & Conditions

Status History

Attachments (2)

Management Record

Terms & Conditions

Get

Source Module	Name	Description	Archived		
Post Award Management	FED-Foreign National Restrictions	Some text here	<input type="checkbox"/>	Edit	Delete
Post Award Management	FIN-Carryforward Not Automatic	Carryforward not automatic.	<input type="checkbox"/>	Edit	Delete
Post Award Management	FIN-Preaward Spending Allowed	Pre-award Spending Allowed	<input type="checkbox"/>	Edit	Delete

Status History

This screen displays the status history of this particular activity record. The most recently added status history and any applicable comments will be listed at the top.

Post Award
Budget Period

Award Compliance Checklist v1.2

General

Terms & Conditions

Status History

Attachments (2)

Management Record

Status History

Status

In Setup

Effective Date

18-Nov-2025

Comments

Status	Date	Recorded Date	Recorded By
In Setup	03-Sep-2025	03-Sep-2025 11:02:52 AM	Stacey Wisnieski Admin
Activity Published			
Activity started	18-Dec-2024	18-Dec-2024 04:10:52 PM	Test815 Lynn Wisnieski
Record Created			

Submission Status History

Release Notes

Attachments

This screen displays uploaded documents associated with this specific activity record. A comprehensive list of attachments for all activities is available at the Management Record level under Attachments.

Post Award
Budget Period

Award Compliance Checklist v1.2

General

Terms & Conditions

Status History

Attachments (2) ▲

Award Compliance Ch...

Organization Hierarchy...

Management Record

Attachments

Add DocumentCombineEmailSubmitPrint AllFolder Maintenance

Drag a column header and drop it here to group by that column

Name ▼	Category ▼	Folder ▼	Managed By ▼	Submission ▼	Versions	Last Updated ▼	Select
Award Compliance Checklist v1.2	Other	ROOT	Submission Package	Budget Period	1	03-Sep-2025 10:34:59 AM	
Organization Hierarchy 2025-08-11	Other	ROOT	Record	Budget Period	1	16-Sep-2025 10:34:55 AM	<input type="checkbox"/>

Management Record

To return to the Management Record level from the Award Activity record, click on the Management Record menu item in the activity menu.

Have Questions?

For additional information or questions regarding the navigation and functionality of InfoEd, email InfoEd@utoledo.edu.