

# **Portfolio Analysis and Management System (PAMS) External User Guide**

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## 1.0 INTRODUCTION

The *Portfolio Analysis and Management System (PAMS)* is a Web-based system for managing Proposals and Reviews submitted to the DOE Office of Science. The PAMS experience is role- and user-sensitive, meaning that each user will see only information and action options that are pertinent to him or her. This customized approach minimizes errors in processing, simplifies the application process, and ensures sensitive information stays protected.

This document is a comprehensive guide to PAMS for financial Award applicants and reviewers. It includes step-by-step directions for registering, applying for financial Awards, reviewing Proposals, tracking Proposals, and taking action on any Proposal or Review assigned to you.

The *PAMS External User Guide* comprises the following sections:

- Section 2.0, [Getting Started](#), is a high-level system overview, which includes:
  - Getting familiar with PAMS
  - Log-in information
  - Supported browsers
  - Navigation through the system
  - System conventions
  - Search fields
  - Pending tasks.
- Section 3.0, [What Can I Do in PAMS?](#), provides instructions for system actions that users are apt to employ every time they are in PAMS. These actions include:
  - Registering to PAMS
  - Managing Institutions
  - Managing submissions
  - Viewing Proposal reviews
  - Tasks to complete after submission
  - Reviewing Proposals.
- **APPENDIX A**, [Glossary](#), provides definitions for the acronyms and potentially unfamiliar terms in the User Guide.
- **APPENDIX B**, [PAMS Helpdesk Contact Information](#), provides telephone numbers and email addresses of the PAMS Helpdesk, which is ready to assist you with using the system.
- **APPENDIX C**, [Proposal Process Flow in PAMS](#), is a high-level flow diagram of the phases that a Proposal goes through in PAMS.



## 2.0 GETTING STARTED

In this section, you will find information on the business processes supported by PAMS, the user roles that support those processes, how to log in and navigate through PAMS, and what you can expect to see while using PAMS.

### 2.1 Getting Familiar with the PAMS User Interface

The following sections introduce you to the various ways you will interact with PAMS.

### 2.2 Logging In

Follow the steps below to log into PAMS:

1. Open your Internet browser.
2. In your browser window, enter the Website address <https://pamspublic.science.energy.gov/> for DOE PAMS and press the **Enter** button. If reading this user guide online, merely click the hyperlinked Website address above to go to PAMS.
3. Enter your user name and password.
4. Click the **Log In** button.



**PAMS will time out after 30 minutes of inactivity, at which point you will have to log in again.**

#### 2.2.1 PAMS Account Is Locked

PAMS locks your account if you try to log in **three times** with an incorrect password. You will have to wait 30 minutes before attempting to log in again.

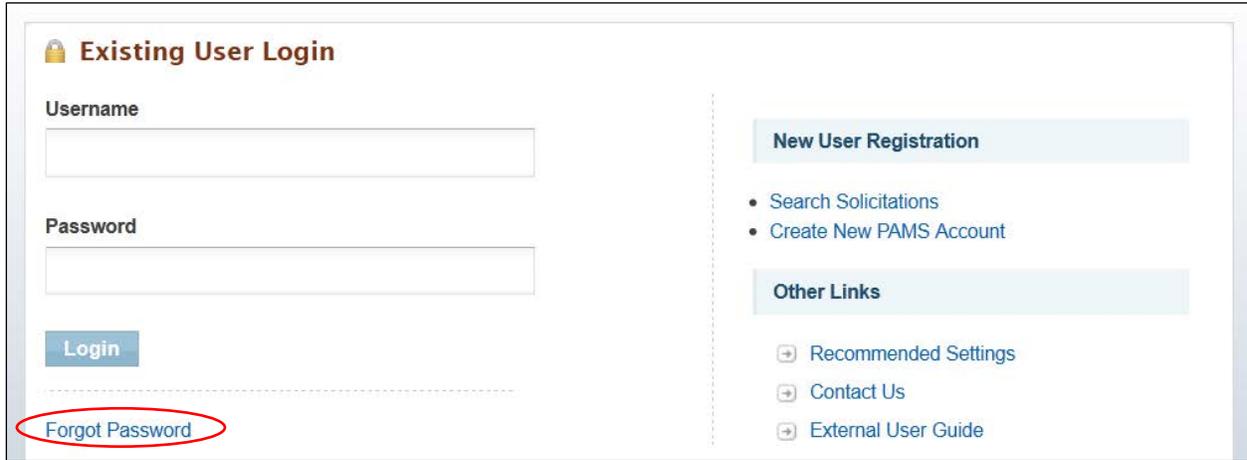
#### 2.2.2 Forgot PAMS Password

To reset your password:

1. Click the **Forgot Password** link on the login page (Figure 1).
2. Answer the security question you set up. You will then receive an email from PAMS with a temporary password. Try logging in again.
3. If you have forgotten the answer to your security question, or are still having login problems, please contact the PAMS Help Desk for assistance (see [Appendix B](#)).



Figure 1. PAMS Existing User Login: Forgot Password Link



### 2.3 Supported Browsers

Table 1 lists the supported browsers that are recommended for access to the complete set of features available in PAMS.

Table 1. Recommended Browsers for PAMS Access

Browser	Version
Internet Explorer	8.0 and above (9.0 is recommended)
Firefox	3.6 and above (11.0 is recommended)
Safari	5.1 and above (5.1 is recommended)
Chrome	20.0 and above (20.0 is recommended)

### 2.4 System Navigation

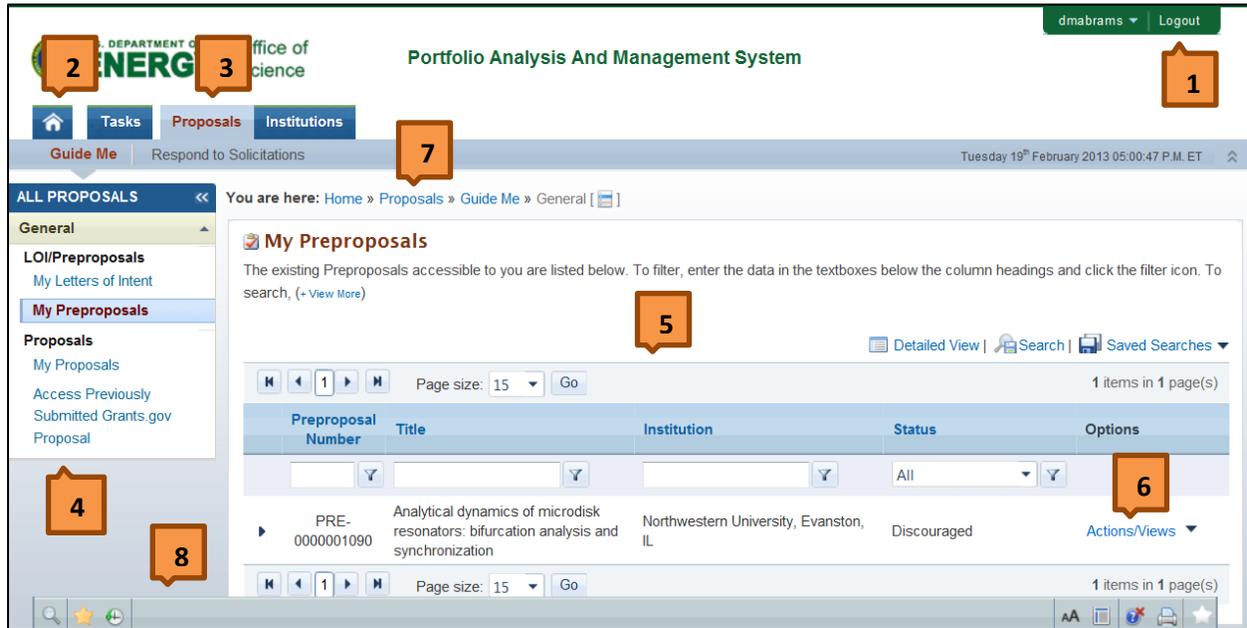
As with many other Web-based systems, your primary input tools are your keyboard and mouse. Additionally, most PAMS pages support keyboard navigation:

- Use the *Tab* key to move the cursor to the next data-entry field or link.
- Use the *Enter* key to invoke a link.
- Use *Shift+Tab* to move in reverse order through fields and links.

Figure 2 and its accompanying table show and describe PAMS’s primary navigation features.



Figure 2. PAMS Navigation Features



Ref. #	Element	Description
1	Logout	Use <i>Logout</i> to exit PAMS. You will have to provide your credentials again to log into PAMS the next time.
2		Home icon takes you to the PAMS <i>Welcome</i> page. Click the <i>Recommended Settings</i> link to see the browser and system settings that provide for optimal viewing of the application.
3	Tabs	At the top of most PAMS pages are tabs to help you navigate through different modules in the system. The tabs shown here are  , Tasks, Proposals, and Institutions.  The blue tab bar, DOE PAMS banner above it, and green menu bar at the very top right of the page can be hidden temporarily by clicking the double-arrows button  at the far right end of the blue tab bar. To make the blue tab bar, DOE PAMS banner, and green menu bar re-appear, click the double-arrows button  at the top right of the page.



Ref. #	Element	Description
4	Left Menu	<p>Within each module, the main menu is often found at the left-hand side of the page. The main menu can be hidden by clicking the double-arrow button  at the top-left corner of the menu.</p> <p>To make the left menu re-appear, click the double-arrows button  at the top left of the page.</p>
5	Grid	<p>A table, or grid, is used when multiple records must be displayed.</p> <p>The left-most column may have arrows  to indicate that the rows are expandable. Click an arrow to expand a row and view detailed information about the record. You can also click the <b>Detailed View</b> link above the grid to expand all rows.</p> <p>The rows may be filtered by entering information in any one of the textbox fields immediately below the grid's column headings, and clicking the filter icon  next to it.</p> <p>Most grids also have a <i>Search</i> feature. The search pane is accessed by clicking the <i>Search</i> link above the grid.</p> <p>The <i>Page Size</i> fields enable you to adjust the height of the grid by indicating the greatest number of [collapsed] rows that may appear on a page. Arrow buttons next to the page number allow you to page through when there are multiple pages.</p>
6	Context Menu	<p>The right-most column in a grid is the <i>Options</i> column. Available options may vary from record to record. An arrow in the <i>Options</i> column means more options are available from which to select. This list of options is called the context menu.</p>
7	Breadcrumb Navigation	<p>Each page in PAMS displays the navigation path you followed to reach the current page. If the navigation path is too long, it is summarized by the application. Hover over the  icon to view the summarized path details.</p>
8	Floating Toolbar	<p>PAMS has a floating toolbar at the bottom of the page that enables easy access to key functions. Options in the floating toolbar often include [View] Messages, [View] Favorites, [View] Recently Accessed, Print, and Create a Shortcut. Important page buttons may also appear in the floating toolbar.</p>



## 2.5 System Conventions

Table 2 lists the conventions for messages generated by PAMS. Symbols used as part of these conventions are designed to convey system messages consistently and to provide you with a richer user experience.

**Table 2. Types of Messages Generated by PAMS**

Symbol	Denotes
	<b>Critical Error.</b> This kind of error must be corrected in order for the system to save your information. If one or more errors of this kind appear on the page and are not corrected, the system will not save the data entered after the last successful save. <b>Example:</b> Entering “two” in a field where “2” is called for produces a Critical Error.
	<b>Regular Error.</b> This kind of error will let you save the information entered. However, if one or more errors of this kind appear on a page and are not corrected, the system will not change the status of the page to “Completed.” If these errors occur while updating the budget sheet on a Proposal, for instance, the budget sheet will not be marked as complete and you will not be able to submit the Proposal. <b>Example:</b> Entering no information in a field where data entry is required may produce a Regular Error.
	<b>Exception.</b> This symbol denotes either a discrepancy or inconsistency in the information entered. Such errors must be corrected or justified.
	<b>Information.</b> This symbol designates a note containing important information regarding your document or report.
	<b>Success Message.</b> This symbol appears when a particular process has been executed successfully, such as when information is saved or submitted.

## 2.6 Search Fields

In this user guide, some search fields have a search requirement similar to the following:

- Institution Name like: Enter the Institution Name or at least a part of it.

The word *like*, as used here, means that if you are uncertain of the exact name of the Institution (or whatever you are searching for), you can enter a part of the name of the Institution you are searching for. For example, if you know that “Water” is part of the Institution name (as in Waterfield Company or Waterman University), enter “water” in the search field and click the **Search** button. The system searches for and pulls up all Institutions with “water” as part of the Institution name.

This search method also works for numbers if *like* is a search option. For example, if you know that part of a Solicitation number includes “FOA,” enter “FOA” only in the search field and click the **Search** button.

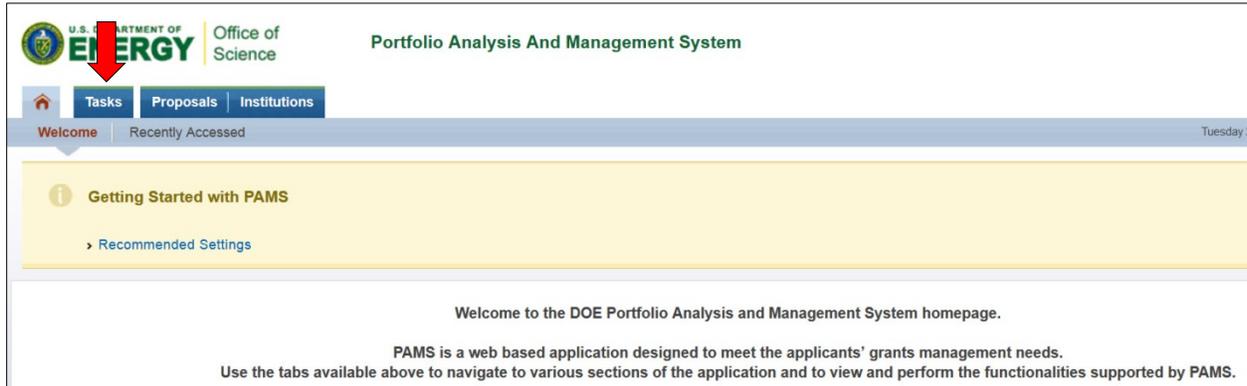
## 2.7 Access Tasks

Tasks are action items that are in your queue. They are usually pending actions that are time sensitive and require your immediate attention. You can access all the tasks assigned to you as follows:

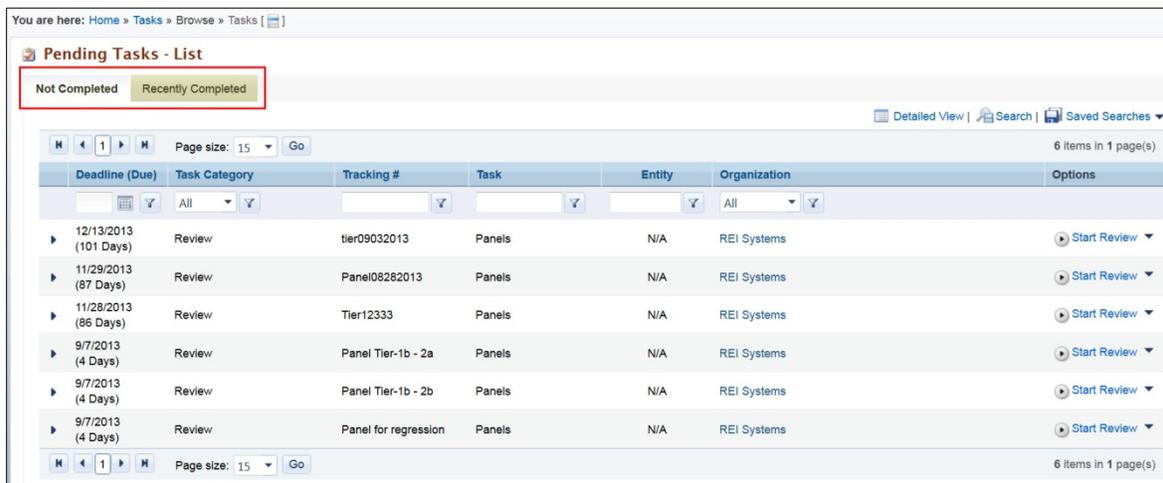
1. From the PAMS home page (Figure 3), click the **Tasks** tab to go to the *Pending Tasks – List* page (Figure 4).



**Figure 3. PAMS Home Page – Tasks Tab**



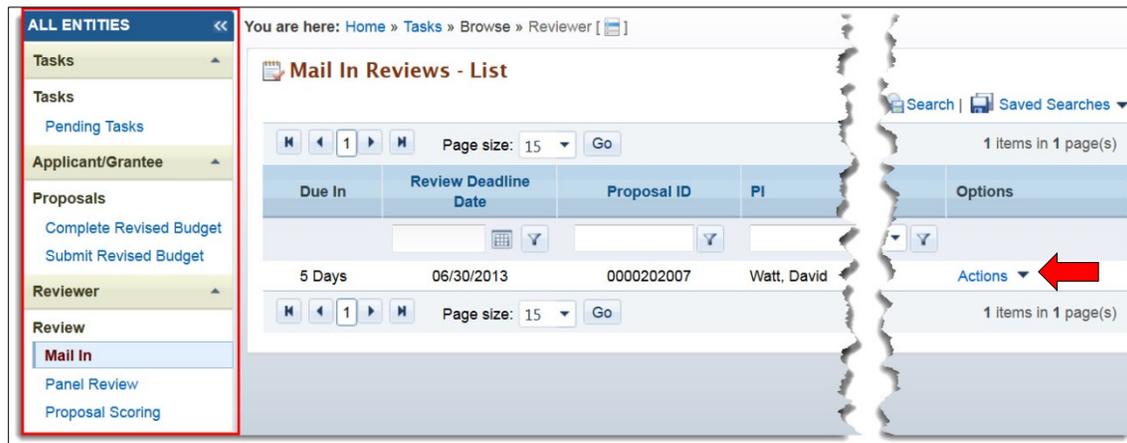
**Figure 4. Pending Tasks - List Page**



- By default, the *Pending Tasks – List* page displays all the tasks currently assigned to you that need your prompt attention. Click the appropriate link in the *Options* column to start work on a task.
- The *Pending Tasks - List* page has two tabs: *Not Completed* and *Recently Completed*. Tasks assigned to you and awaiting action from you are under the *Not Completed* tab. The *Recently Completed* tab enables you to see tasks that have been processed.
- Alternatively, you can click the task name in the left navigation menu (Figure 5) to view the list of documents requiring that task.



Figure 5. Left Navigation for Tasks



5. Click the **Actions** link in the *Options* column to view and complete the task.
6. Once the task has been completed, the task moves to the *Recently Completed* tab.

## 2.8 How to Attach a File in PAMS

Some PAMS activities, such as submitting Proposals, Preproposals, Letters of Intent (LOI), and Revised Budgets, enable you to attach one or more document files from your personal computer or network. Attaching a file can be either an option or a requirement, depending on the task you are performing.

The following steps explain how to attach document files in PAMS. The Submit Letter of Intent (LOI) screens are used as an example for this procedure.



**Attaching a document file is usually the last step in a procedure. For that reason, the Attach File button could be grayed-out when you first come to a page, as it is in Figure 6. Fill in all the other mandatory fields first before attempting to attach files.**

1. Expose the attach-file fields, if they not already visible, by clicking either the **Attach File** button at the far right of the page of the section title or the ▶ arrow at the far left of the section title (Figure 6).



**Figure 6. Attach File: Screen 1**

2. Click the **Browse** button (Figure 7) to select a file from your computer or network (Figure 8)

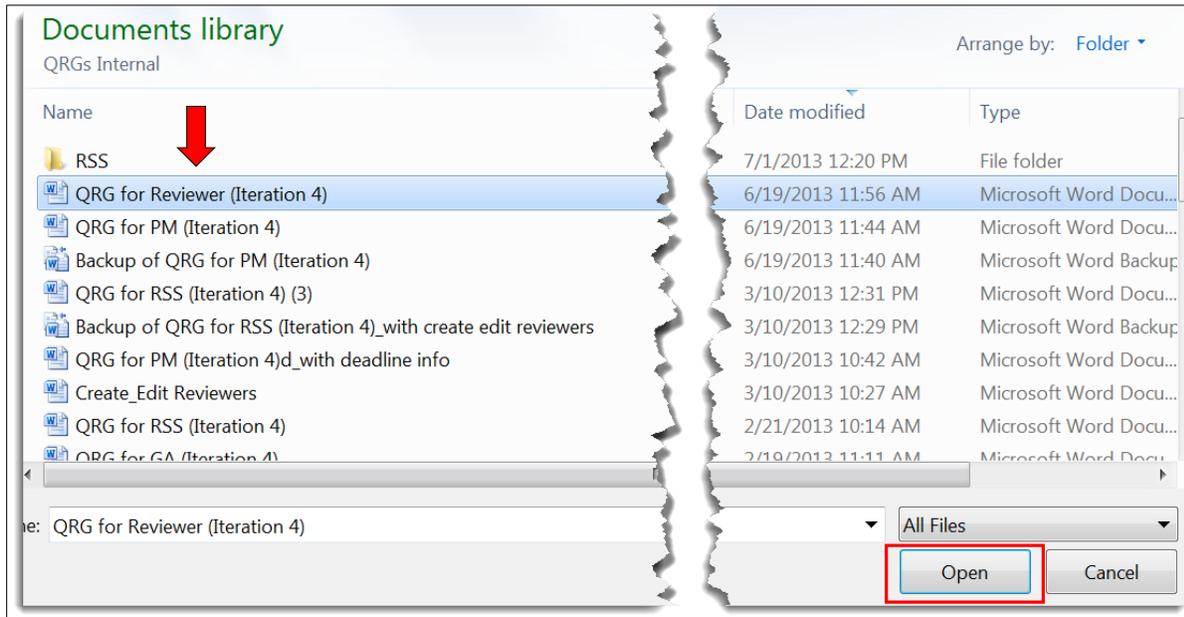
**Figure 7. Attach File: Screen 2**



*The Documents library page shown in Figure 8 is only a sample. Your document files will look different.*



Figure 8. Attach File: Screen 3



3. Highlight the file you wish to attach in PAMS and click the **Open** button.
4. Click the **Upload** button (Figure 7) to attach the document file in PAMS, as shown in Figure 9. (*Max 1 Allowed* means that PAMS only accepts one file attachment for this functionality.)

Figure 9. Attach File: Screen 4



5. If you wish, enter an optional document summary in the *Description* field (Figure 7).
6. In the *Options* column, click the **Actions** dropdown (Figure 9). If necessary, click either the **Update Description** link or the **Delete Attachment** link to perform the respective action.
7. Click the **Save** button (Figure 7) to retain your work.
8. Click the **Submit to DOE** button if your work is complete and ready to send to DOE.

## 2.9 View/Update Your PAMS Profile

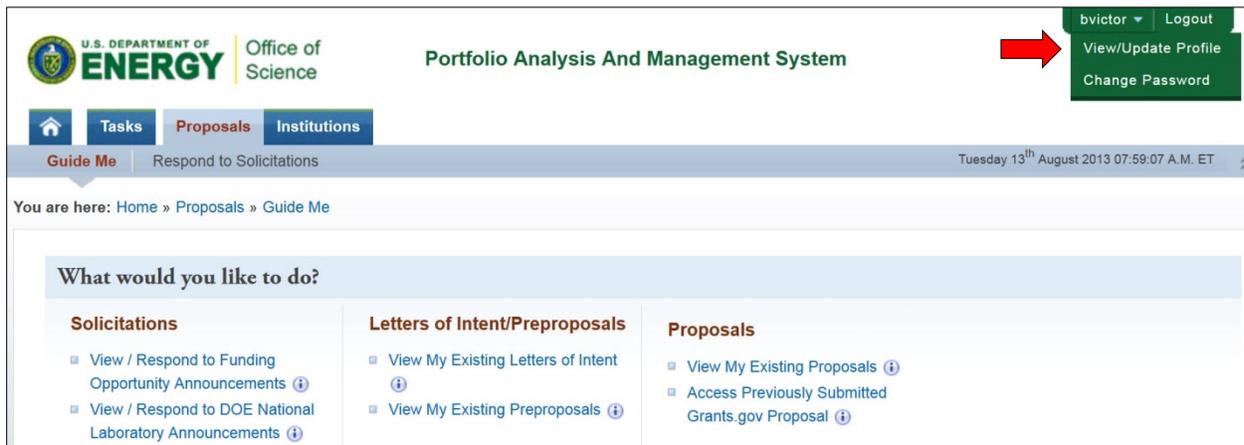
The *View/Update Profile* page (Figure 11) enables PAMS users to view and update their personal PAMS information.

### 2.9.1 How to View Your Profile

1. From any PAMS page, click the account name drop-down list located in the green bar at the top-right corner of the page (Figure 10).

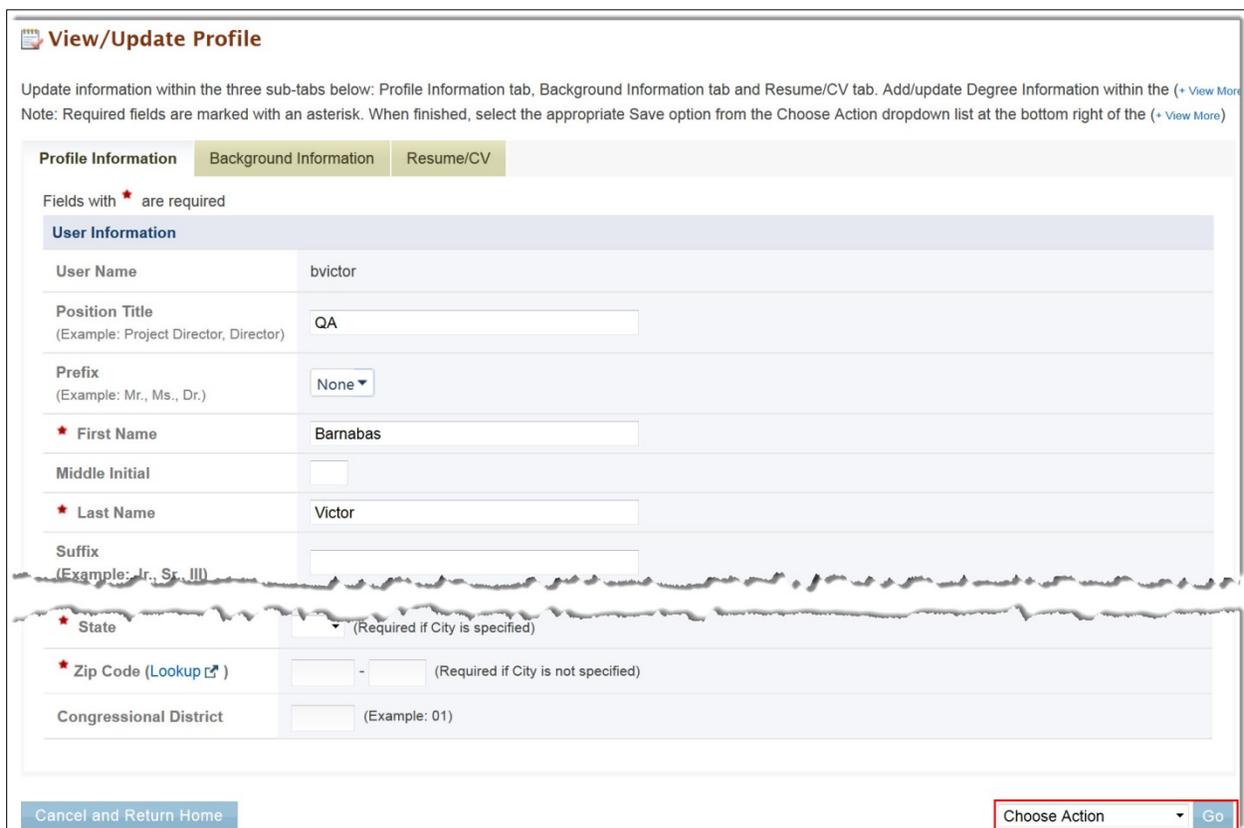


Figure 10. Account Name Drop-Down List



2. Click the **View/Update Profile** link from the drop-down list to go to the *View/Update Profile* page (Figure 11).

Figure 11. View/Update Profile Page



### 2.9.2 How to Update Your Profile

3. The *View/Update Profile* page has three sub-tabs: *Profile Information*, *Background Information*, and *Resume/CV*.



4. Click the tab labels to view the information contained on those pages. If required, update the information in the fields on the page.
5. Alternatively, you may select **Save and Continue** from the *Choose Action* drop-down list at the bottom right corner of the page. Click the **Go** button and proceed to the next tab.
6. You may also select **Save and Return Home** from the drop-down list to save your changes and return to the PAMS home page.



### 3.0 WHAT CAN I DO IN PAMS?

The PAMS external user application allows users to perform the following actions, depending on their system privileges:

- Registration
- Manage Institutions
- Manage Submissions
- Proposal Review

The following sections explain each of these actions in detail.

### 3.1 Registration

The User Registration process in PAMS is a two-step one:

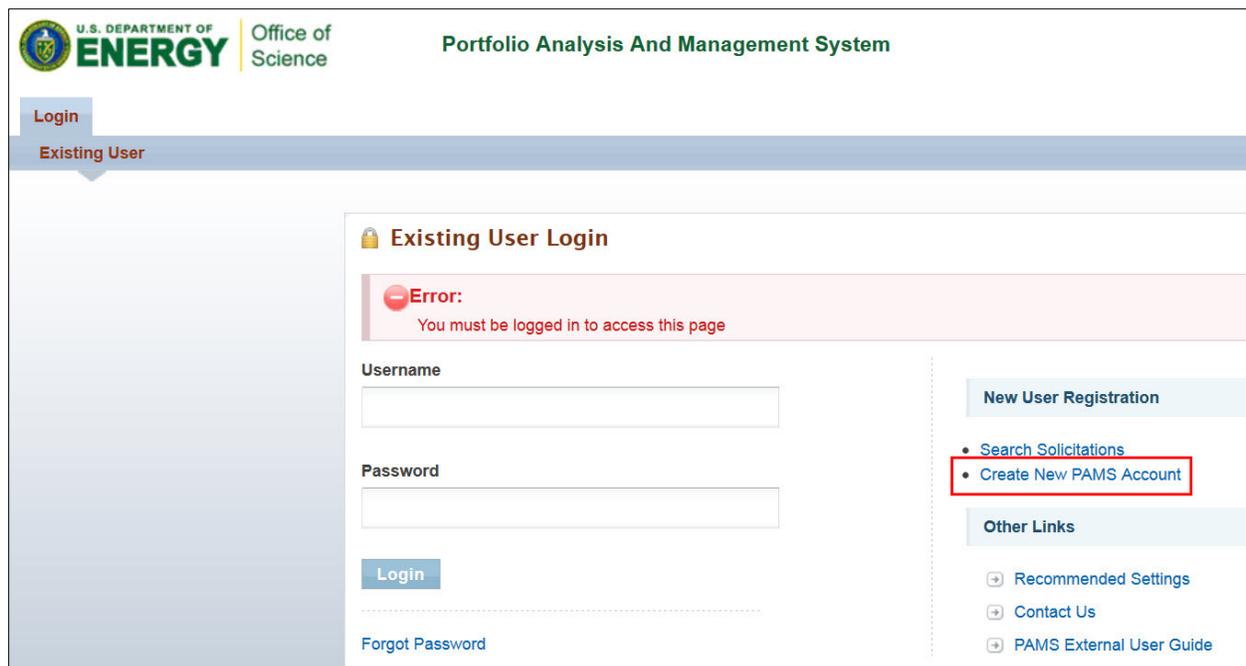
1. Register to PAMS.
2. Register to an Institution.

Registering to PAMS ensures that you have authorized access to PAMS, whereas registering to an Institution ensures that you are associated to an Institution. Based on your role, you may be able to manage Institutions and/or users within the Institution. Once you have registered to PAMS, you will be able to view/update your profile as well.

#### 3.1.1 How Do I Register to PAMS?

1. Visit the PAMS Website (<https://pamspublic.science.energy.gov/>).
2. Click the **Create New PAMS Account** link at the far right of the page (Figure 12).

**Figure 12. PAMS Login: Create New Account Link**





3. On the *Having Trouble Logging In* page (Figure 13), click the **No, I have never had an account** link and then click the **Create an Account** button.

**Figure 13. Having Trouble Logging In Page**

**Having Trouble Logging In?**  
Click on the appropriate option below to troubleshoot login issues.

**Do you have a PAMS account?**

**No, I have never had an account**

**Create an Account**

Registration within PAMS is a two step process:

- Create an individual account for yourself. This account should not be shared with any other user.
- Affiliate the account to your institution record if it already exists and affiliate your account to it. Each account can be associated with one or more institution(s).

**Yes, but I did not complete my registration.**

**Yes, but I forgot my username.**

**Yes, but I forgot my password.**

**Yes, but my account was disabled.**

**Yes, but it was for a different institution. I am here to work for another institution.**

4. This takes you to the *Create Account* page (Figure 14). Complete the form. Note that fields marked by a ★ are mandatory.
5. Click the **Save and Continue** button when you are finished, and the page expands further to enable you to enter more account information (Figure 15).

**Figure 14. Create Account Page**

**Create Account**  
Enter required information as shown below. When finished, click Save and Continue.

Fields with ★ are required.

**Personal Information**

Prefix (Example: Mr., Ms., Dr.)

★ First Name

Middle Initial

★ Last Name

Suffix (Example: Jr., Sr., III)

★ Username

★ Password

★ Retype Password

★ Security Question

★ Security Answer

★ Email

**Password Instructions**  
Passwords must be at least eight characters in length and contain the following:

- At least one lowercase letter (a-z)
- At least one uppercase letter (A-Z)
- At least one number (0-9)
- At least one of these five special characters: ~ ! @ # \*



**In the Mailing Address fields (Figure 15), you will enter information for ONLY ONE of the following: a Street Address, a Post Office (PO) Box, or a Rural Route:**

- The *Street Number* field is for the number of your dwelling; e.g., if you live at 123 21<sup>st</sup> Street, *123* is entered in the *Street Number* field, not 21<sup>st</sup>. You would enter *21<sup>st</sup> Street* in the *Street Name* field.
- Use the *Select One* drop-down to specify your specific dwelling type, if that designation is part of your address, e.g., *APT* for apartment, *BLDG* for building, etc.
- The *Number* field next to the *Select One* drop-down is to enter a number for your specific dwelling type, e.g., *APT 3*, *BLDG 5A*, etc.

**Figure 15. Create Account Page Expanded**

Contact Information	
* Email Address	<input type="text" value="pkeefe@reisystems.com"/> (username@domain.com) <input checked="" type="radio"/> Preferred
	<input type="text" value="(username@domain.com)"/> <input type="radio"/> Preferred
	<input type="text" value="(username@domain.com)"/> <input type="radio"/> Preferred
* Phone Number	Select Typ. <input type="text"/> <input type="text"/> - <input type="text"/> Ext. <input type="text"/> <input checked="" type="radio"/> Preferred
	Select Typ. <input type="text"/> <input type="text"/> - <input type="text"/> Ext. <input type="text"/> <input type="radio"/> Preferred
	Select Typ. <input type="text"/> <input type="text"/> - <input type="text"/> Ext. <input type="text"/> <input type="radio"/> Preferred
Fax Number	<input type="text"/> <input type="text"/> - <input type="text"/>
Website	<input type="text"/>
* Mailing Address (Required)	
Mailstop Code (Internal Routing)	<input type="text"/>
Division / Department Name	<input type="text"/>
Company	<input type="text"/>
Address Type	<input checked="" type="radio"/> Domestic Address <input type="radio"/> International Address <input type="button" value="Refresh"/>
Specify Domestic Address (Street Address or PO Box Only or Rural Route)	
<input type="radio"/> * Address	Street Number <input type="text"/> * Street Name <input type="text"/> Select One <input type="text"/> Number <input type="text"/>
<input type="radio"/> * PO Box Only	Number <input type="text"/>
<input type="radio"/> * Rural Route	Type Select Route <input type="text"/> Number <input type="text"/> Box <input type="text"/>
* City	<input type="text"/> (Required if Zip is not specified)
Urbanization	<input type="text"/> (Used only for Puerto Rico(PR))
* State	<input type="text"/> (Required if City is specified)
* Zip Code (Lookup <a href="#">↗</a> )	<input type="text"/> - <input type="text"/> (Required if City is not specified)
Congressional District	<input type="text"/> (Example: 01)
Specify Domestic Address	
<a href="#">▶ Click here to enter physical location address if different from mailing address. (Providing this address is optional.)</a>	
<input type="button" value="Create Account"/>	



- Continue to complete all required fields. When finished, click the **Create Account** button in the bottom-right corner of the page.
- Next, you must read the PAMS Rules of Behavior Agreement that appears (Figure 16). Click the **Accept** button to complete the PAMS registration process.

**Figure 16. PAMS Rules of Behavior Agreement**

**Agreement**

Fields with \* are required.

**Note(s):**  
Please read this information carefully and accept by clicking on the 'Accept' button to proceed. You may decline it by clicking on the 'Decline' button, and you will not be able to log in.

**PORTFOLIO ANALYSIS AND MANAGEMENT SYSTEM (PAMS)**

**NOTICE TO USERS**

This is a U.S. Government, Department of Energy (DOE) system and it is for the use of authorized users only. The system is to be used for official Government business pertaining to the inquiring, applying, and managing of proposals and awards. Unauthorized access or use of this system may subject violators to criminal, civil, and/or administrative action. It is protected by various provisions of Title 18, U.S. Code. Violations of Title 18 are subject to criminal prosecution in Federal court.

**PRIVACY NOTICE**

The system contains personal information protected under the provisions of the Privacy Act of 1974, 5 U.S.C. § 552(a), as amended. Violations of 5 U.S.C. § 552(a) may subject the offender to criminal penalties.

In the event it is suspected that you have not complied with these Rules of Behavior, your account will be frozen, you will be denied any access to the site, and criminal, civil, and/or administrative action may also be taken.

The Privacy Act generally prohibits government agencies from revealing personal information by any means of communication to any person without the prior written consent of the individual. DOE will maintain the confidentiality of the information and will not release it to any person without the prior written consent of the individual. DOE employees are subject to the same statutory criteria applicable to DOE employees under the Privacy Act.

**RULES OF BEHAVIOR**

- I consent to having my activities on the system monitored and understand that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence obtained by such monitoring to law enforcement officials.
- I will not make unauthorized attempts to view or change information, or otherwise cause damage to the system and system data. Unauthorized attempts to upload information, change or access information on this service are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986.
- Information I provide in the course of using this system, and activities I perform in this system, shall not be false, inaccurate or misleading; violate any law, statute, ordinance or regulation, contain any viruses or any malicious code that may damage, detrimentally interfere with, surreptitiously intercept, or expropriate any system, data, or personal information.
- I agree to protect my access codes from disclosure.
- I agree to report security incidents and vulnerabilities to the DOE.
- I will comply with the provisions of copyrighted software by not infringing upon or compromising (copy, distribute, manipulate, etc.) software of this system.
- I agree to use the PAMS system in accordance with the DOE's policies and procedures.
- I understand that all conditions and obligations imposed upon me by these rules apply during the time I am granted access to this system regardless of location.
- I understand that the DOE reserves the right to terminate or suspend my access and use of PAMS, without notice, if there is a violation or suspected violation of these Rules of Behavior.

By submitting this page, I am consenting to the above stipulations.

I acknowledge and understand my responsibilities and agree to comply with the rules of behavior for PAMS.

Decline
Accept

**Note**

***You are now registered to PAMS and are logged in. You can browse through solicitations and view other information in PAMS, but you will need to register to an institution before you can submit proposals or work with previous submissions.***

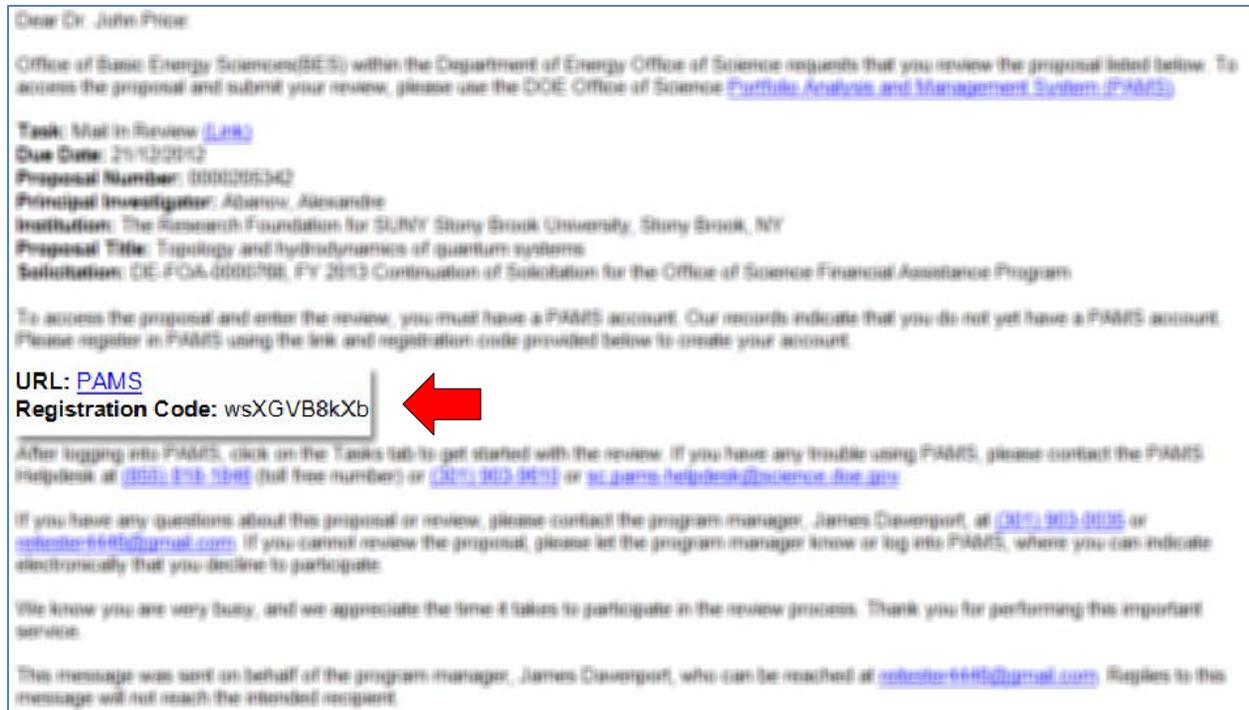


### 3.1.2 How Do I Register to PAMS Using a Unique Registration Code?

If a task has been assigned to you in PAMS and you are not registered to PAMS, you will receive an email relevant to the task. This email will also provide information about registering with PAMS.

The email will provide a PAMS URL and a unique registration code that are needed to complete the registration process. Figure 17 is a sample email, with a PAMS URL and a unique registration code included.

**Figure 17. Registration Code Email**



1. Click the PAMS URL in the email. This will take you to a PAMS login page (Figure 18). Enter the registration code and click the **Verify** button. This takes you to the *Create Account* page (Figure 14).

**Figure 18. Enter Registration Code**

**Verify PAMS User**

**User Registration**

\* Registration Code

Verify Cancel



*The First Name, Last Name, and Email fields on the Create Account page are prepopulated and not editable. Once you complete your profile and are registered to PAMS, you will be able to update these fields from your profile. Edit your profile by choosing View/Update Profile LINK from the account dropdown in the top right corner of any PAMS page (refer to Section 2.9).*

2. Enter all mandatory information on the *Create Account* page.
3. Click the **Save and Continue** button when you are finished, and the page expands further to enable you to enter more account information (Figure 15).
4. Continue with the account creation process as instructed in Section 3.1.1, *How Do I Register to PAMS?*

### 3.1.3 How Do I Register to an Institution in PAMS?

After you have created an account in PAMS, you can register to an Institution in PAMS if you wish to submit Letters of Intent, Preproposals, certain types of Proposals, or work with previous submissions. As soon as you register to an institution in PAMS, an email is sent from PAMS to the institution's Administrative SRO/BO/AO (see below) letting that person know that you have joined the institution. If the Administrative SRO/BO/AO does not believe you are authorized to be registered to the institution, he/she may remove you.

Registering to an Institution is performed using one of the following options:

1. Register using Grants.gov Proposal Information.
2. Register using Institution Information.

#### 3.1.3.1 Register Using Grants.Gov Proposal Information



*If you are already registered to an Institution—or you do not want to register to an Institution for any other reason—click the Cancel button on this page. Upon doing so, you will be registered to PAMS but will not be registered to any Institution.*

1. To register to an Institution using Grants.Gov Proposal information, click the **My Institution has submitted a Proposal in Grants.gov. I am here to register as an SRO, PI, or POC** link (Figure 19).



**Figure 19. Register to Institution Page**

2. The form shown in Figure 20 appears. The next sections discuss the different roles available to you in PAMS and their respective requirements. Please review them before clicking the **Save and Continue** button.

**Figure 20. Register to Institution - Grants.gov Proposal Page**

### 3.1.3.2 I Want to Register as a PI for the Institution

The Principal Investigator (PI) is responsible for:

- Composing and possibly submitting LOIs, Preproposals, and certain types of Proposals in response to Solicitations
- Overseeing the research activities supported by DOE Office of Science Awards.

Follow these steps to register as a PI:

1. Enter the PAMS *Proposal ID* and *Email* address.
2. Choose the *PI* role on the *Register to Institution* page (Figure 21). Click the **Save and Continue** button.



Figure 21. Register to Institution as Principal Investigator (PI)

**Register to Institution - Grants.gov Proposal**

Enter proposal ID, email and choose a role to register to the institution and get view access to the proposal. If you are an SRO/BO/AO(Sponsored Research Officer/Business Officer/Administrative Officer) ([View More](#))

Fields with \* are required

**Institution Details**

\* Proposal ID

\* Email(as entered in Grants.gov proposal)

\* Choose Role

SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)

PI (Principal Investigator)

Other (Point of Contact)



**The Proposal ID and email address should match the Proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF-424 (R&R) Proposal, which was submitted via Grants.gov. Only one PI can register to the Institution using the Grants.gov Proposal information.**

- You are taken to the *Institutions* tab (Figure 22), where a *Success* message provides registration verification.

Figure 22. Institutions List - PI Registration Success Message

U.S. DEPARTMENT OF ENERGY | Office of Science Portfolio Analysis And Management System

youssief Logout

Proposals Institutions

Browse Guide Me Tuesday 22<sup>nd</sup> May 2012 03:12:07 P.M. ET

You are here: Home » Institutions » Browse

**Institutions - List**

**Success:**  
You have been successfully registered to the institution.

Register to Another Institution Detailed View

Page size: 15 Go 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View



**At this point, you are registered as a PI for your specific Institution. Additionally, you have been granted access to view the Proposal that was used to register to the Institution.**



### 3.1.3.3 I Want To Register as an SRO/BO/AO to the Institution

The Sponsored Research Officer/Business Officer/Administrative Officer (SRO/BO/AO) role is usually held by an administrative representative responsible for submitting Proposals to DOE Funding Opportunity Announcements (FOA) and/or managing Institution information and users in PAMS.

Follow these steps to register as an SRO/BO/AO:

1. Enter *Proposal ID* and *Email* address.
2. Choose the **SRO/BO/AO** role on the *Register to Institution* page (Figure 23). Click the **Save and Continue** button.

**Figure 23. Register to Institution as an SRO/BO/AO**

**Register to Institution - Grants.gov Proposal**  
Enter proposal ID, email and choose a role to register to the institution and get view access to the proposal. If you are an SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer) (- View More)

Fields with \* are required

**Institution Details**

\* Proposal ID

\* Email (as entered in Grants.gov proposal)

\* Choose Role

SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)

PI (Principal Investigator)

Other (Point of Contact)



**The Proposal ID and email address should match the Proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF-424 (R&R) Proposal, which was submitted via Grants.gov. Only one SRO/BO/AO can register to the Institution using the Grants.gov Proposal information.**

3. If the Institution you wish to register to does not have an Administrative SRO/BO/AO in PAMS yet, you will be prompted to register as an Administrative SRO/BO/AO for the Institution (Figure 24). The Administrative SRO/BO/AO is responsible for managing users and the institution profile in PAMS.



Figure 24. Register to Institution as Administrative SRO/BO/AO

You are here: [Home](#) » [Welcome](#)

### Register to Institution

**Success:**  
 Congratulations. You are registered as an SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer) for this institution  
**Institution Name:** North Dakota State University  
**EIN:** 45-6002439  
**DUNS:** 803882299

**Are you the administrator for this institution? Do you wish to have the access to manage this institution in PAMS?**

Yes. Please grant me the administrator privileges for this institution

No. I want to send an invitation to the appropriate administrator to register with PAMS.

No.

[Return](#) [Continue](#)



At this point, you will be presented with the following three options:

- Register to the Institution as an Administrative SRO/BO/AO
- Invite another user from the Institution to register as an Administrative SRO/BO/AO
- Continue with the registration process and just get registered as an Administrative SRO/BO/AO.

4. If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button (Figure 25). This will take you to the *Institutions* tab.

Figure 25. Register to Institution as Designated Administrator

You are here: [Home](#) » [Welcome](#)

### Register to Institution

**Grant Administrative Privileges**

I am the designated administrator to manage this institution in PAMS. I certify that all the information provided by me on this form is true and correct.

[Cancel](#) [Save and Continue](#)

5. If you choose to invite another user to register as an Administrative SRO/BO/AO to the Institution (Figure 26), provide all mandatory inputs on page (all fields marked by a red star are mandatory) and click the **Send Email** button. This will send an email to the person you identified and take you to the *Institutions* tab.



Figure 26. Register to Institution - Invite Another User to Register as Administrator

You are here: [Home](#) > [Welcome](#)

### Register to Institution

Please invite the administrator for your institution to register with PAMS.

\* Email ID

\* First Name

\* Last Name

Comments

Approximately 1 page (Max 2000 Characters): 2000 Characters left.

- If you simply want to register to the Institution, you are taken to the *Institutions* tab, where a *Success* message provides registration verification (Figure 27).

Figure 27. Institutions List - SRO/BO/AO Registration Success Message

U.S. DEPARTMENT OF ENERGY | Office of Science | Portfolio Analysis And Management System

youussef | Logout

Proposals | **Institutions**

Browse | Guide Me | Tuesday 22<sup>nd</sup> May 2012 03:12:07 P.M. ET

You are here: [Home](#) > [Institutions](#) > [Browse](#)

### Institutions - List

**Success:**  
You have been successfully registered to the institution.

[Register to Another Institution](#) [Detailed View](#)

Page size: 15 | Go | 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	<a href="#">View</a>
Adelphi University	Long Island	NY		N/A	<a href="#">View</a>
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	<a href="#">View</a>



**At this point, you will be registered to the Institution as an SRO. Depending on whether you chose to be the Administrative SRO/BO/AO, you will also have the Manage Institution and Manage Users privileges. Once you are registered as an SRO/BO/AO to the Institution, you will have View and Manage Peer Access privileges to the Grants.gov Proposal.**

### 3.1.3.4 I Want To Register as a Point of Contact (POC) to the Institution

Follow these steps to register as a POC:



1. Enter *Proposal ID* and *Email* address.
2. Choose the *Other (Point of Contact)* option on the *Register to Institution* page (Figure 28). Click the **Save and Continue** button.

**Figure 28. Register to Institution - as Point of Contact (POC)**

**Register to Institution - Grants.gov Proposal**  
 Enter proposal ID, email and choose a role to register to the institution and get view access to the proposal. If you are an SRO/BO/AO(Sponsored Research Officer/Business Officer/Administrative Officer) (+ View More)

Fields with \* are required

**Institution Details**

\* Proposal ID

\* Email(as entered in Grants.gov proposal)

\* Choose Role  
 SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer)  
 PI (Principal Investigator)  
 Other (Point of Contact)

**Note** *The Proposal ID and email address should match the Proposal ID and email address listed in the automated email sent by PAMS upon receiving the SF-424 (R&R) Proposal, which was submitted via Grants.gov. Only one POC can register to the Institution using the Grants.gov Proposal information.*

3. Upon successful registration, you are taken to the *Institutions* tab, where a *Success* message provides registration verification (Figure 29).

**Figure 29. Institutions List -Point of Contact Registration Success Message**

U.S. DEPARTMENT OF ENERGY | Office of Science  
 Portfolio Analysis And Management System

yousef | Logout

Proposals | **Institutions**

Browse | Guide Me | Tuesday 22<sup>nd</sup> May 2012 03:12:07 P.M. ET

You are here: Home » Institutions » Browse

**Institutions - List**

**Success:**  
 You have been successfully registered to the institution.

Register to Another Institution [Detailed View](#)

Page size: 15 | Go | 14 items in 1 page(s)

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	<a href="#">View</a>
Adelphi University	Long Island	NY		N/A	<a href="#">View</a>
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	<a href="#">View</a>

**Note** *At this point, you are registered to the Institution as a POC. Additionally you will also be able to view the Proposal.*



### 3.1.3.5 Register Using Institution Information

This section covers two ways to register using Institution information.

#### 3.1.3.5.1 I Want to Register as a PI/Other User to the Institution, Using Institution Information

1. To register to an Institution using Institution information, click the ***I know my institution and I am here to register to the institution*** link (Figure 30).

**Figure 30. Register to an Institution, Using Institution Information Page**

**Register to Institution**

Choose one of the options to register to an institution within PAMS. This will associate you with an institution and provide access to submissions from the institution as (+ View More)

Fields with \* are required

**Register to Grants.Gov Proposal**

My institution has submitted a proposal in Grants.gov. I am here to register as an SRO, PI, or POC (Sponsored Research Officer, Principal Investigator, or Point of Contact).

Select the most appropriate option for you to find your Institution

I know my institution and I am here to register to the institution.

Cancel

2. Enter all mandatory information on the page and click the **Search** button (Figure 31). Note that fields marked by a red star are mandatory. Choose the *PI* or *Other* role.



***If you are a Reviewer or a POC for any proposal from the institution, please select the "Other" option. You may also select the "Other" option if you are not associated with any proposal from the institution.***



***The first bullet below states "Institution Name like." The word "like," as used here, means that if you are uncertain of the exact name of the Institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that "Water" is part of the Institution name (as in Waterfield Company or Waterman University), enter "water" in the search field and click the Search button. The system searches for and pulls up all Institutions with "water" as part of the Institution name.***

- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number (optional)
- DUNS: Enter the DUNS number (optional).



**Figure 31. Registering to an Institution – Search Button**

3. If you find your Institution listed in the grid, click the **Action** link and then click the **Add me to this Institution** link (Figure 32).

**Figure 32. Registering to an Institution – Adding Self**

4. If you do not find your Institution, search again until you find it. If you suspect your institution is not in the system, click the **Cannot Find My Institution** button (Figure 33).

**Figure 33. Registering to an Institution –Cannot Find My Institution Button**

5. Enter mandatory inputs to create the Institution and click the **Create Institution** button to create a new Institution in PAMS on the *Create Institution* page (Figure 34). Note that fields marked by a red star are mandatory.



Note

***In the Mailing Address fields (Figure 34), you will enter information for ONLY ONE of the following: a Street Address, a Post Office (PO) Box, or a Rural Route:***

- The *Street Number* field is for the number of your dwelling; e.g., if you live at 123 21<sup>st</sup> Street, 123 is entered in the *Street Number* field, not 21<sup>st</sup>. You would enter 21<sup>st</sup> Street in the *Street Name* field.
- Use the *Select One* drop-down to specify your specific dwelling type, if that designation is part of your address, e.g., *APT* for apartment, *BLDG* for building, etc.
- The *Number* field next to the *Select One* drop-down is to enter a number for your specific dwelling type, e.g., *APT 3*, *BLDG 5A*, etc.



Figure 34. Create Institution Page

**Create Institution**

**Institution Information**

\* Institution Name

Institution Website

\* Institution Type  If Other, please specify:

Sub Type  Women Owned  Socially And Economically Disadvantaged

EIN/TIN

DUNS  (Example: 123456789 or 123456789INDV)

---

**\* Mailing address (Required)**

Mailstop Code (Internal Routing)

Division / Department Name

Address Type  Domestic Address  International Address

Specify Domestic Address (Street Address or PO Box Only or Rural Route)

\* Address Street Number  \* Street Name   
 Select One  Number

\* PO Box Only Number

\* Rural Route Type  Number  Box

\* City  (Required if Zip is not specified)

Urbanization  (Used only for Puerto Rico(PR))

\* State  (Required if City is specified)

\* Zip Code (Lookup [?](#))  -  (Required if City is not specified)

Congressional District  (Example: 01)

Providing the address information below is optional. If you decide to provide the address then all fields marked with an \* are required

**Physical Location Address (Optional)**

Address Type  Domestic Address  International Address

Specify Domestic Address

\* Address Street Number  \* Street Name   
 Select One  Number

\* City  (Required if Zip is not specified)

Urbanization  (Used only for Puerto Rico(PR))

\* State  (Required if City is specified)

\* Zip Code (Lookup [?](#))  -  (Required if City is not specified)

Congressional District  (Example: 01)

- Upon successful registration, you are taken to the *Institutions* tab, where a *Success* message confirms registration verification.

**Note** *At this point, you are registered to the Institution as a PI/Other User role.*



### 3.1.3.5.2 I Want to Register as an SRO/BO/AO User to the Institution Using Institution Information

1. To register to an Institution using Institution information, click the **I know my institution and I am here to register to the institution** link (Figure 35).

**Figure 35. Register to an Institution as an SRO/BO/AO**

2. Input all mandatory information on the page and click the **Search** button. Note that fields marked by a red star are mandatory. Choose the role as *SRO/BO/AO* (Figure 36).

**Note** *The first bullet below states "Institution Name like." The word "like," as used here, means that if you are uncertain of the exact name of the Institution you are searching for, you can enter a term that is similar to the name you want. For example, if you know that "Water" is part of the Institution name (as in Waterfield Company or Waterman University), enter "water" in the search field and click the Search button. The system searches for and pulls up all Institutions with "water" as part of the Institution name.*

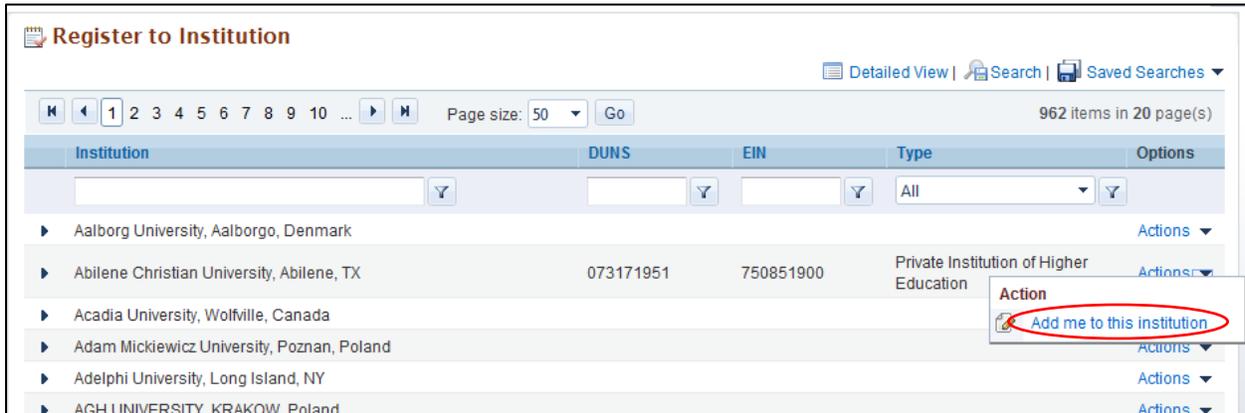
- Institution Name like: Enter the Institution Name or at least a part of it
- EIN: Enter the Employer Identification Number (optional)
- DUNS: Enter the DUNS number (optional).

**Figure 36. Institution Name Like Field**

3. If you find your Institution listed in the grid, click the **Action** link and then click the **Add me to this Institution** link (Figure 37).

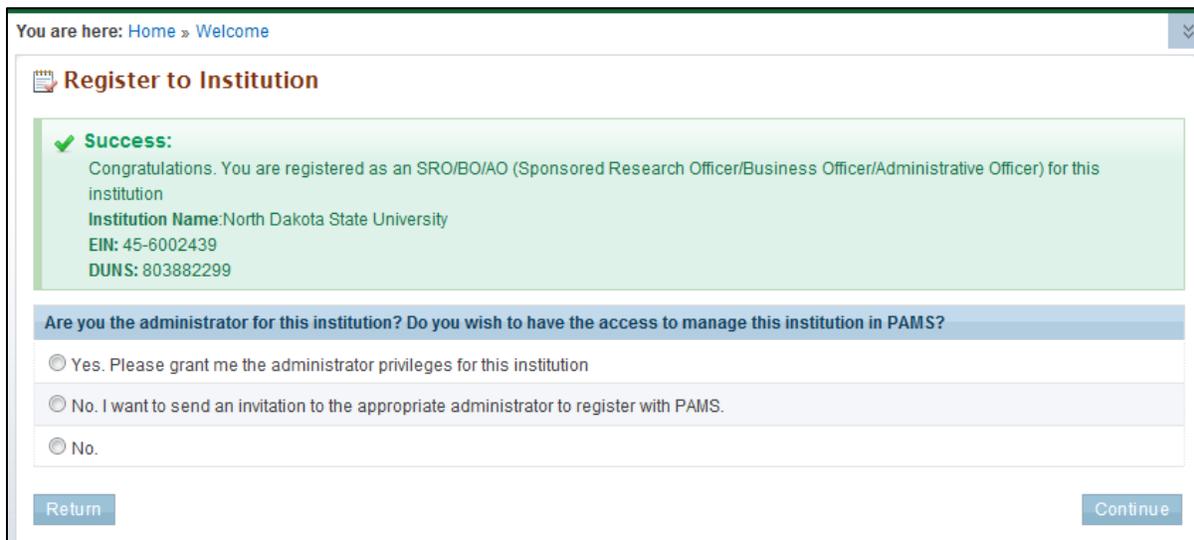


**Figure 37. Register to an Institution - Add Me to This Institution**



4. If the Institution you wish to register to does not have an Administrative SRO/BO/AO in PAMS, you will be prompted to register as an Administrative SRO/BO/AO for the Institution (Figure 38).

**Figure 38. Register to an Institution - as an Administrative SRO/BO/AO**



At this point, you are presented with the following three options:

- Register to the Institution as an Administrative SRO/BO/AO
- Invite another user from the Institution to register as an Administrative SRO/BO/AO
- Continue with the registration process and just get registered as an SRO.



5. If you choose to register as an Administrative SRO/BO/AO, click the check box to accept the agreement and click the **Save and Continue** button (Figure 39). This will take you to the *Register to Institution* page (Figure 40).

**Figure 39. Register to Institution as an Administrative SRO/BO/AO**

You are here: Home » Welcome

### Register to Institution

**Grant Administrative Privileges**

I am the designated administrator to manage this institution in PAMS. I certify that all the information provided by me on this form is true and correct.

6. If you choose to invite another user to register as an Administrative SRO/BO/AO to the Institution, provide all mandatory inputs on the Email page and click the **Send Email** button. Note that fields marked by a red star are mandatory. This will take you to the *Register to Institution* page (Figure 40).

**Figure 40. Register to Institution - Invitation to Administrator**

You are here: Home » Welcome

### Register to Institution

Please invite the administrator for your institution to register with PAMS.

\* Email ID

\* First Name

\* Last Name

Comments

Approximately 1 page (Max 2000 Characters): 2000 Characters left.

7. Upon successful registration, you are taken to the *Institutions* tab, where a *Success* message provides registration verification (Figure 41).



Figure 41. Institutions Tab

The screenshot shows the 'Institutions' tab in the PAMS system. At the top, there is a navigation bar with 'Proposals' and 'Institutions' tabs. Below the navigation bar, there is a breadcrumb trail: 'You are here: Home » Institutions » Browse'. A success message is displayed: 'Success: You have been successfully registered to the institution.' Below the message, there is a 'Register to Another Institution' link and a 'Detailed View' link. A table lists institutions with columns for Name, City, State, DUNS, Type, and Options. The table contains three rows of data.

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View

8. If you do not find your Institution, search again until you find it. If you suspect your institution is not in the system, click the **Cannot Find My Institution** button (Figure 33).
9. On the *Create Institution* page (Figure 34), provide mandatory inputs to create the Institution and click the **Submit** button to create a new Institution in PAMS. Note that fields marked by a red star are mandatory.



**In the Mailing Address fields (Figure 34), you will enter information for ONLY ONE of the following: a Street Address, a Post Office (PO) Box, or a Rural Route:**

- The *Street Number* field is for the number of your dwelling; e.g., if you live at 123 21<sup>st</sup> Street, 123 is entered in the *Street Number* field, not 21<sup>st</sup>. You would enter 21<sup>st</sup> Street in the *Street Name* field.
- Use the *Select One* drop-down to specify your specific dwelling type, if that designation is part of your address, e.g., *APT* for apartment, *BLDG* for building, etc.
- The *Number* field next to the *Select One* drop-down is to enter a number for your specific dwelling type, e.g., *APT 3*, *BLDG 5A*, etc.

10. Upon successful registration, you are taken to the *Institutions* tab, where a *Success* message provides registration verification.



**At this point, you are registered to the Institution as an SRO/BO/AO user. Based on your search results, you may or may not have created a new Institution in PAMS.**

### 3.1.3.6 Registering to Multiple Institutions

If you are associated with more than one Institution, you can simply go to your *Institutions* tab (Figure 42), click the **Register to Another Institution** link, above the grid, to search for your Institution, and register to it in PAMS. This might be required when a user is associated with an Institution and has a small business or when a user is associated with a lab and with a university, etc.

**Figure 42. Institutions List - Registering to Multiple Institutions**

U.S. DEPARTMENT OF ENERGY | Office of Science | Portfolio Analysis And Management System

Proposals | Institutions

Browse | Guide Me | Tuesday 22<sup>nd</sup> May 2012 04:58:06 P.M. ET

You are here: Home » Institutions » Browse

Institutions - List

Register to Another Institution | Detailed View

Page size: 15 | Go | 15 items in 1 page(s)

Name	City	State	DUNS	Type	Options
▶ Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View ▼
▶ Adelphi University	Long Island	NY		N/A	View ▼
▶ Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View ▼
▶ ALAKHAWAYNE UNIVERSITY	IFRANE	Morocco		Private Institution of Higher Education	View ▼
▶ Albert Einstein College of Medicine of Yeshiva University	Bronx	NY	071036636	Private Institution of Higher Education	Actions/Views ▼

## 3.2 Manage Institutions

This section explains the PAMS Manage Institution functionality.

### 3.2.1 Who Can Become an Administrator for an Institution?

- When you register as an SRO/BO/AO to an Institution that does not yet have an Administrative SRO/BO/AO, you are presented with the option to become an Administrative SRO/BO/AO for that Institution. Upon selecting this option, you are granted administrative privileges for that Institution. These privileges include Manage Users and Manage Institution Profile.
- All other users have to be granted administrative privileges by users who already have them.

### 3.2.2 What Are Administrative Privileges? What Can I Do with Them?

The two types of administrative privileges are:

- **Manage Institution Profile:** Users with this privilege can edit Institution profile information in PAMS.
- **Manage Users:** Users with this privilege can grant or revoke privileges and peer access for other users registered to the Institution. These users can also remove other registered users from the Institution.

### 3.2.3 How Can I Manage Privileges?

- Manage Privileges is the concept of allowing select users to manage the Institution Profile and users registered to the Institution.
- Privileges can be managed at an Institution level for users.
- Privileges can be managed only for users who are registered to the same Institution.
- SRO users who have registered to PAMS via a Grants.gov Proposal receive these privileges by default. Other users can be granted these privileges by users who already have the Manage Users privilege.



### 3.2.4 What Is Peer Access? How Does It Work?

- Peer Access is the concept of allowing select users, who are registered to the Institution, to access submissions in PAMS.
- Peer Access can be managed at a submission level, by the users who create the submissions, from the *My Proposals*, *My Preproposals*, and *My Letters of Intent* pages.
- Peer access can also be managed at an Institution level, from the Institution Folder, by users who have administrative privileges.
- Peer Access can be extended only to users who are registered to the same Institution.

### 3.2.5 Institution Folder

The Institution folder is your one-stop shop for all activities associated with the Institution. You can:

- Manage the Institution Profile
- Manage Users from the Institution
- Manage Your Submissions.

Follow the steps below to access the Institution Folder:

1. Log into PAMS using your credentials. Click the *Institutions* tab (Figure 43).

**Figure 43. Institutions Tab**

The screenshot shows the 'Institutions' tab in the PAMS interface. The header includes the U.S. Department of Energy logo, 'Office of Science', and 'Portfolio Analysis And Management System'. The navigation bar has 'Proposals' and 'Institutions' tabs, with 'Institutions' highlighted. Below the navigation bar, there is a breadcrumb trail 'You are here: Home » Institutions » Browse' and a 'Register to Another Institution' link. A table lists registered institutions with columns for Name, City, State, DUNS, Type, and Options. The table contains five rows of data.

Name	City	State	DUNS	Type	Options
Abilene Christian University	Abilene	TX	073171951	Private Institution of Higher Education	View
Adelphi University	Long Island	NY		N/A	View
Advanced Energy Systems, Inc.	Medford	NY	042903026	Small Business	View
ALAKHAWAYNE UNIVERSITY	IFRANE	Morocco		Private Institution of Higher Education	View
Albert Einstein College of Medicine of Yeshiva University	Bronx	NY	071036636	Private Institution of Higher Education	Actions/Views

2. The *Institutions* tab displays all the Institutions you are registered to. Choose the Institution and click the **Actions/Views** and **Institution Folder** links (Figure 44).



Figure 44. Institutions List – Register to Another Institution

Name	City	State	DUNS	Type	Options
▶ ACENT Laboratories LLC	Manorville	NY	804033277	Small Business (N/A)	View Institution Folder View Profile Proposals Letter of Intent Preproposals
▶ Advanced Magnet Laboratory, Inc.	Palm Bay	FL	943748681	Small Business (N/A)	
▶ Air Force Research Laboratory	Kirtland AFB	NM	027292023	Other Federal Agency	
▶ Air Force Research Laboratory	Kirtland AFB	NM	027292023	Other Federal Agency	
▶ Alabama A&M University	Normal	AL	079121448	Historically Black Colleges and Universities (HBCUs)	

- To manage an Institution’s profile, go to the *Institutions* section. To manage submissions, go to the *Submissions* section (Figure 45).

Figure 45. Institution Folder – Submissions Section

Institution Folder		
Albert Einstein College of Medicine of Yeshiva University, Bronx, NY		
DUNS: 071036636	EIN: 131624225	Institution Type: Private Institution of Higher Education
Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia		
Institutions		
Users	Manage Users	
Profile	Update Profile	
Submissions		
Letter of Intent	Work on Letters of Intent	View Submitted Letters of Intent
Preproposal	Work on Preproposals	View Submitted Preproposals
Proposals	Work on Proposals	View Submitted Proposals

### 3.2.5.1 Manage Institution Profile

You can view/update the Institution profile in PAMS. Editing the Institution profile requires you to have the Manage Institution privilege for the Institution. If you registered to PAMS as the Administrative SRO/BO/AO, you will be assigned these privileges by default. If you do not have Manage Institution privileges, you will only be able to view the Institution profile. Follow the steps below to view or edit the Institution profile:

- If you have Manage Institution privileges, click the **Update Profile** link (Figure 46). Otherwise, click **View Profile**.



Figure 46. Institution Folder – Update Profile Link

**Institution Folder**

▼ **Albert Einstein College of Medicine of Yeshiva University, Bronx, NY**

DUNS: 071036636      EIN: 131624225      Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

▼ **Institutions**

Users	<a href="#">Manage Users</a>
Profile	<a href="#">Update Profile</a>

▼ **Submissions**

Letter of Intent	<a href="#">Work on Letters of Intent</a>	<a href="#">View Submitted Letters of Intent</a>
Preproposal	<a href="#">Work on Preproposals</a>	<a href="#">View Submitted Preproposals</a>
Proposals	<a href="#">Work on Proposals</a>	<a href="#">View Submitted Proposals</a>

- If you have the Manage Institution privileges and wish to update the Institution profile, update the necessary information and click the **Save and Continue** button (Figure 47).

Figure 47. Update Institution Profile – Save and Continue Button

**Update Institution Profile**

Fields with \* are required.

**Institution Information**

\* Institution Name: Albert Einstein College of Medicine of Yeshiva University

Institution Website:

\* Institution Type: Private Institution of Higher Education (If Other, please specify: )

Sub Type:  Women Owned  Socially And Economically Disadvantaged

EIN/TIN: 131624225

\* DUNS: 071036636

---

\* State: NY (Required if City is specified)

\* Zip Code (Lookup): 10461 - 1975 (Required if City is not specified)

Congressional District:  (Example: 01)

- If you do not have the privileges to Manage Institution, you will only be able to view the Institution Profile by clicking the **View Profile** link (Figure 48).





**Figure 49. Institution Folder – Manage Users Link**

**Institution Folder**

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636      EIN: 131624225      Institution Type: Private Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

**Institutions**

Users	<b>Manage Users</b>
Profile	Update Profile

**Submissions**

Letter of Intent	Work on Letters of Intent	View Submitted Letters of Intent
Preproposal	Work on Preproposals	View Submitted Preproposals
Proposals	Work on Proposals	View Submitted Proposals

2. To manage a user in PAMS, you must first search for the user. If you wish to manage a user at the Institution level, click the  icon next to *By Users*. Provide inputs for first name and last name. Click the **Search** button (Figure 50).

**Figure 50. Manage Users Search**

**Manage Users**

How would you like to Manage Peer Access?

By Letter of Intent

By Preproposal

By Proposal

By Users

Last Name like

First Name like

Cancel **Search**

Cancel

3. If you wish to manage existing users, click the **Actions/Views** link and choose either the **Manage Privileges** or **Remove from Institution** link (Figure 51).



Figure 51. Manage Users List – Manage Privileges Link

**Manage Users - List**

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636      EIN: 131624225      Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Search

Page size: 15    Go    4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, P	<ul style="list-style-type: none"> <li>Manage Privileges</li> <li>Remove from Institution</li> </ul>
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	P	
User, Bahia	abahia	user5@gmail.com	703-729-2232		

Page size: 15    Go    4 items in 1 page(s)

- If you wish to manage users by submission, click the icon next to *By Preproposals*, *By Letters of Intent*, or *By Proposals*. Enter the Tracking Number (Preproposal ID, LOI ID, and Proposal ID) or the Project Title and click the **Search** button (Figure 52).

**Note** *The second and third bullets below state “Project Title like” and “Solicitation Number like.” The word “like,” as used here, means that if you are uncertain of the exact project title or Solicitation number you are searching for, you can enter a part of the title or number. For example, if you know that “FOA” or “DX” is part of the Solicitation number (as in FOA-2-05172012 or DX-999888777), enter “FOA” or “DX” in the search field and click the Search button.*

- Agency Tracking Number: Enter the Proposal ID
- Project Title like: Enter the Project Title or at least a part of it
- Solicitation Number like: Enter the Solicitation Number or at least a part of it.



**Figure 52. Manage Users - Search Button**

5. Clicking the **Search** button will take you to a page listing the submissions available in the Institutions (Figure 53).

**Figure 53. Manage Users - Preproposals**

Tracking Number	Title	Institution	Status	Options
PRE-000000325	PREPROPOSAL CONCURRENCY CHECK ?	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	In Progress	Action
PRE-000000303	Preproposal title capacity check . 15 boulevard planet earth . 15 boulevard planet earth .	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Action Manage Peer Access
PRE-000000291	TEST PROPOSAL DUE DATE IN PREPROPOSAL RECOMMENDATION	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Action

6. Click the **Action** link against the submission. If you have Manage User privileges, click the **Add/Update Users** link. Otherwise, click the **View Users** link. You will be able to view a list of all users who have access to the submission. In case you wish to add more users from the Institution to the submission, click the **Add New Person** link (Figure 54).



Figure 54. Manage Peer Access User List – Add New Person

**Manage Peer Access - User List**

The users with access to this Preproposal are listed below. To filter, enter the data in the textboxes below the column headings and click the filter icon. To search, click the Search link above the grid. Click the arrow in the Options column to see all available actions. Click the Add New Person link above the grid to add a new person.

PRE-0000000325: PREPROPOSAL CONCURRENCY CHECK 7 Status: In Progress

[Add New Person](#) [Search](#)

Page size: 15 Go 2 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Point of Contact, SRO/BO	<a href="#">Actions</a>
User, Bahia	abahia	user5@gmail.com	703-729-2232	PI, SRO/BO	<a href="#">Actions</a>

Page size: 15 Go 2 items in 1 page(s)

[Return to List Page](#)

- If you know the first name, last name, or username of the new person, search for the user within PAMS by entering one or more of those inputs and clicking the **Search** button. Choose a user and click the **Actions** link. Then click the **Add User** link (Figure 55).

Figure 55. Manage Peer Access Add User – Add User Link

**Manage Peer Access - Add User**

PRE-0000000325: PREPROPOSAL CONCURRENCY CHECK 7 Status: In Progress

[Search](#)

Page size: 15 Go 2 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	<a href="#">Actions</a>
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI, SRO/BO	<a href="#">Action</a>

Page size: 15 Go 2 items in 1 page(s)

[Return To List Page](#)

**Add User**

- Once the user is added, you need to select the appropriate peer access options and click the **Save and Continue** button (Figure 56).

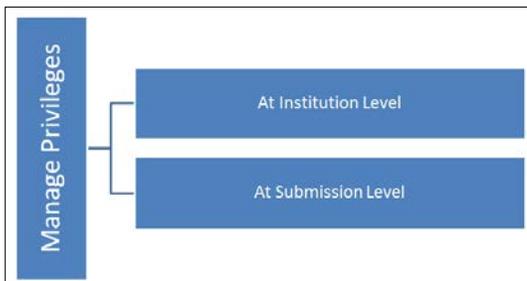


Figure 56. Manage Peer Access User – Options

**Note** *You can only add users who are already registered to the Institution.*

### 3.2.6 Manage Users

**Note** *Managing users requires you to have the Manage Users privilege at the Institution or submission level. If you do not have this privilege, you will not be able to do any of the following Manage actions in PAMS.*



Users can be managed at two levels:

- Institution Level (Privileges)
- Submission Level (Peer Access)

1. To manage privileges at the Institution level, go to the **Manage Users** link, click the *By Users* link, and click the **Search** button.
2. Against the user record, click **Action** and then click the **Manage Privileges** link (Figure 57).



Figure 57. Manage Users List - Manage Privileges Link

**Manage Users - List**

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Page size: 15 Go 4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions: Manage Privileges Remove from Institution
Ennaciri, Youssef	youssef	yennacir1@gmail.com	202-555-6545	PI, Po	
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI	
User, Bahia	abahia	user5@gmail.com	703-729-2232	SRO/BO	

Page size: 15 Go 4 items in 1 page(s)

Cancel

3. Check/uncheck the privileges to be assigned to the user and click the **Save and Continue** button (Figure 58).

Figure 58. Manage User Privileges - Update Privileges Options

**Manage User Privileges**

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636 EIN: 131624225 Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

**User Information**

Name: Lina Bacha

Role: PI, Point of Contact, SRO/BO

Update Privileges:  Manage Institution Profile  Manage Users

Cancel Save and Continue

4. To manage peer access at the submission level, go to the **Manage Users** link and click the *By Letters of Intent* (Figure 59), *By Preproposals* (Figure 60), or *By Proposals* (Figure 61) link—based on the submission—and click the **Search** button (.

**Note** *The third bullet below states "Solicitation Number like." The word "like," as used here, means that if you are uncertain of the exact Solicitation number you are searching for, you can enter a part of the number. For example, if you know that "FOA" or "DX" is part of the number (as in FOA-2-05172012 or DX-999888777), enter "FOA" or "DX" in the search field and click the Search button.*

- Tracking Number: Enter the LOI Number or the Preproposal Number
- Agency Tracking Number: Enter the Proposal ID
- Solicitation Number like: Enter the Solicitation Number or at least a part of it.



Figure 59. Manage Users by Letter of Intent

Figure 60. Manage Users by Preproposal

Figure 61. Manage Users by Proposal



*You can manage submission-level peer access from the My Preproposals, My Letters of Intent, and My Proposals pages also.*

- From the submission list page, select your submission, click **Actions** and click **Manage Peer Access**. From the users list page, click **Actions** and then click **Manage Peer Access** (Figure 62). Click the **Remove From** link to remove all access from the submission (Figure 63).



Figure 62. Submission List Page - Manage Peer Access Link

Tracking Number	Title	Institution	Status	Options
PRE-0000000325	PREPROPOSAL CONCURRENCY CHECK 7	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	In Progress	Actions
PRE-0000000303	Preproposal title capacity check , 15 bouleva15 boulevard planet earth , 15 boulevard planet earth ,	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Actions <b>Manage Peer Access</b>
PRE-0000000291	TEST PROPOSAL DUE DATE IN PREPROPOSAL RECOEMMENDATION	Albert Einstein College of Medicine of Yeshiva University, Bronx, NY	Submitted to DOE	Actions

Figure 63. Users List Page - Remove From Preproposal Link

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	PI, Point of Contact, SRO/BO	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Point of Contact	Actions <b>Remove From Preproposal</b>
User, Bahia	abahia	user5@gmail.com	703-729-2232	P	Actions

**Note** *You cannot manage peer access or privileges for yourself. You can only manage other users in PAMS.*

### 3.2.7 Remove from Institution

Follow the steps below to remove a user from the Institution:

1. From the *Institution Folder*, identify the user to be removed by clicking the **Manage Users** link, the *By Users* link, and the **Search** button.
2. Click **Actions** and then click **Remove from Institution** to remove the user from the Institution (Figure 64).



**Figure 64. Manage Users List Page - Remove From Institution Link**

**Manage Users - List**

Albert Einstein College of Medicine of Yeshiva University, Bronx, NY

DUNS: 071036636      EIN: 131624225      Institution Type: Private Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): User, Bahia

Page size: 15    Go    4 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
Bacha, Lina	lina	bacha2@gmail.com	703-222-2343	SRO/BO	Actions
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	PI, Po	Action
Hartnet, Mike	mhartnet	test@reisis.com	455-678-6789 Ext: 56898	PI,	
User, Bahia	abahia	user5@gmail.com	703-729-2232	SRO/BO	Remove from Institution

Page size: 15    Go    4 items in 1 page(s)

Cancel

**Note** *Once a user has been removed from an Institution, he or she cannot be reinstated through PAMS. The user needs to contact the PAMS Helpdesk to be reinstated to an Institution. Call (855) 818-1846 (toll free), (301) 903-9610, or email [sc.pams-helpdesk@science.doe.gov](mailto:sc.pams-helpdesk@science.doe.gov) .*

### 3.3 Manage Submissions

Submissions in PAMS include the following:

- Proposals
- Preproposals
- Letters of Intent.

You can use PAMS to manage submissions as follows:

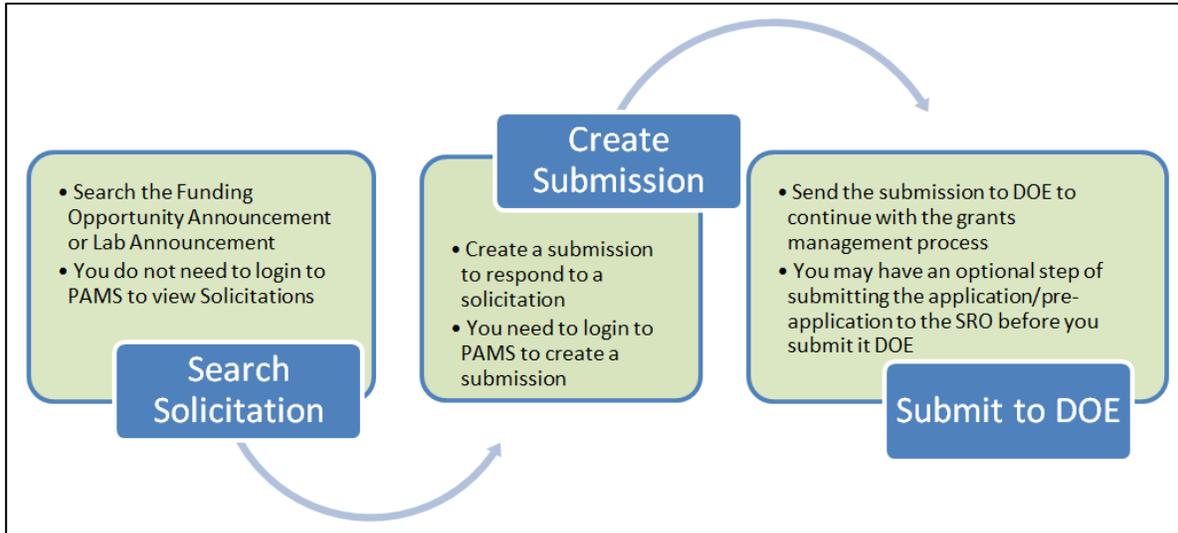
- Create/Edit/Delete/Submit Submissions
- View Submissions created by other users of the Institution (provided you have access).

#### 3.3.1 How Do I Respond to a Solicitation?

Responding to a Solicitation could be through a Letter of Intent, Preproposal, or a formal DOE National Laboratory Proposal. Figure 65 summarizes the process for responding to a Solicitation:



**Figure 65. Responding to a Solicitation**



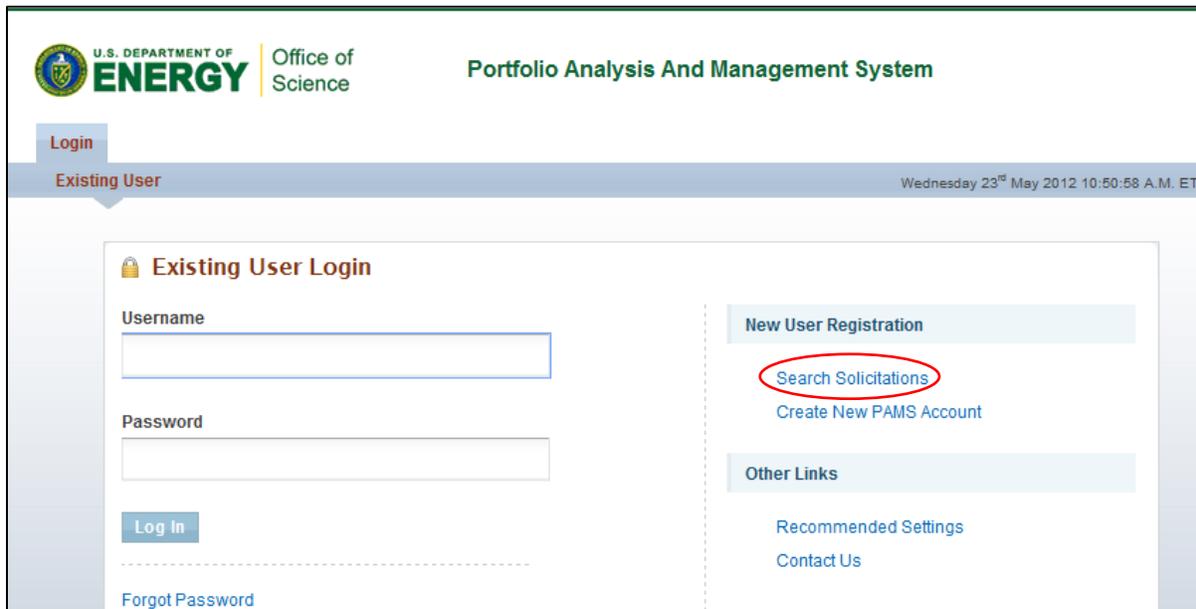
### 3.3.2 How Do I Search Solicitations?

The first step in managing submissions is to identify the Solicitation. Once the Solicitation is identified, you can respond with the appropriate submission requested.

### 3.3.3 I Am Not Logged in to PAMS

1. On the login page of PAMS, click the **Search Solicitations** link (Figure 66). The link is located under *New User Registration* on the right side of the page.

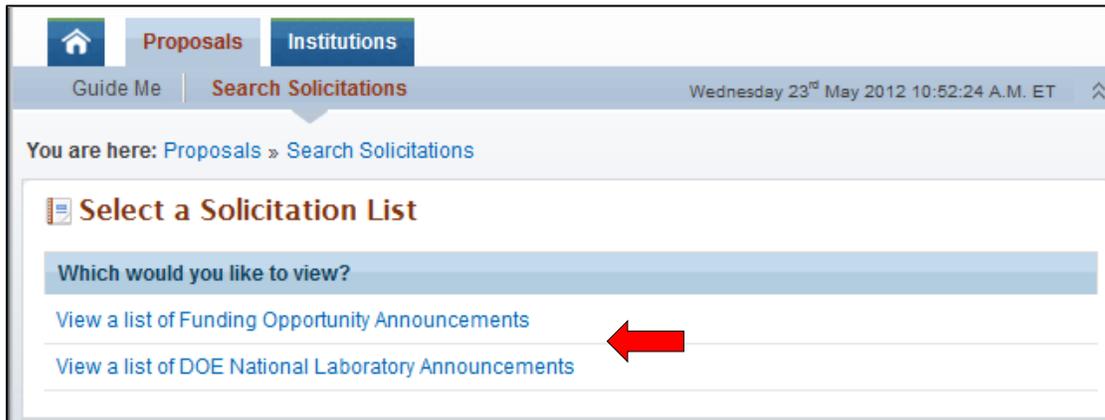
**Figure 66. Existing User Login**





2. Choose an appropriate Solicitation list. You can view the Funding Opportunity Announcements by clicking the **View a list of Funding Opportunity Announcements** link, or you can view Lab Announcements by clicking the **View a list of DOE National Laboratory Announcements** (Figure 67).

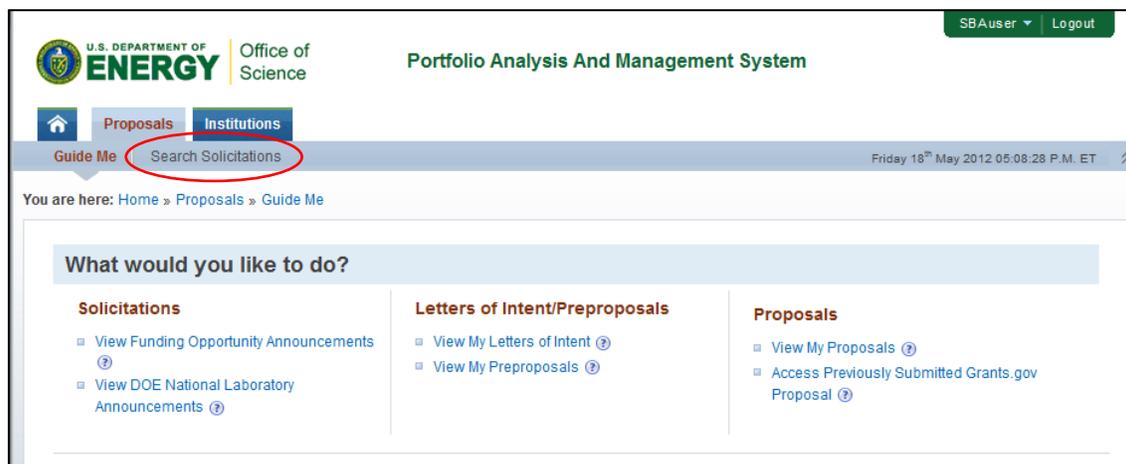
**Figure 67. Proposals Tab - Select a Solicitation List**



### 3.3.4 I Am Logged in to PAMS

1. Click the **Proposals** tab and then click the **Search Solicitations** link (Figure 68).

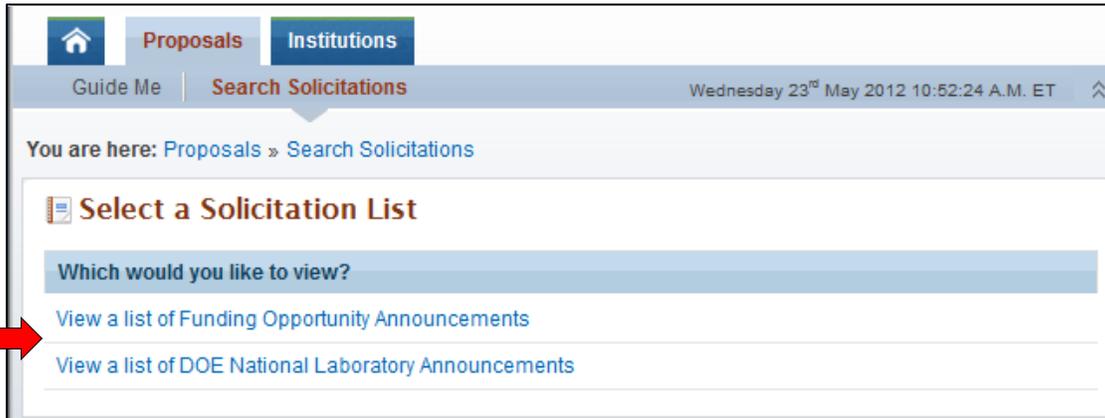
**Figure 68. Proposals Tab - Search Solicitations Link**



2. Choose the Solicitation list. You can view the Funding Opportunity Announcements by clicking the **View Funding Opportunity Announcements** link, or you can view Lab Announcements by clicking the **View DOE National Laboratory Announcements** (Figure 69).



**Figure 69. Proposals Tab - Choosing a Solicitation List**



Once you have identified the Solicitation of interest, you can create a submission to respond to it.

### 3.3.4.1 Create and Submit a Preproposal

Follow the steps below to create and submit a Preproposal:

1. Click the **Actions/Views** link and then click the **Submit Preproposal** link (Figure 70).

**Figure 70. Funding Opportunity Announcements List – Submit Preproposal Link**



2. Provide the required information on the *Submit Preproposal* page. Note that fields marked by a red star are mandatory. To choose a PI, click the **Select PI** button (Figure 71).



Figure 71. Submit Preproposal Page - Select PI Link

**Submit Preproposal**

Complete the form below to submit a Preproposal. Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the Institution (+ View More)

**Solicitation Information**

Solicitation Number: DE-FOA-PPTest4576: High Energy Density Laboratory Plasmas

\* Institution: Select One

**\* PI Information** [?](#) **Select PI**

Name: N/A

Email Address: N/A

Phone Number: N/A

Address: N/A

**Project Information**

\* Preproposal Title:

\* Program Manager: Select One

Preproposal (Maximum 1)

No documents attached

3. Search for the PI using the search criteria. Click the **Action** link against the PI record and then click the **Select PI** link (Figure 72). If the PI is not registered to the Institution in PAMS, click the **Invite PI** link.

Figure 72. Select PI Page - Invite PI Link

**Select PI**

[+ Invite PI](#)

Page size: 15  5 items in 1 page(s)

Name	User Name	Email	Phone	Options
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Ennaciri, cbahia	cbahia	cbahia@gmail.com	703-729-7654	<a href="#">Actions</a>
Ennaciri, Elias	elias	ennaciri01@gmail.com	703-999-8767	<a href="#">Action</a> <a href="#">Select PI</a>
Smith, Jane	extuser02	reitester2@gmail.com	546-546-4564 Ex	
Arias, Lynette	larias	larias@gmail.com	476-457-8907 Ext: 67980	<a href="#">Actions</a>
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	<a href="#">Actions</a>

Page size: 15  5 items in 1 page(s)



4. Complete the form by entering the required information. Note that fields marked by a red star are mandatory (Figure 73).

**Figure 73. Submit Preproposal - Attach File and Submit to DOE Links**

**Submit Preproposal**  
Complete the form below to submit a Preproposal. Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the Institution (+ View More)

**Solicitation Information**

Solicitation Number	DE-FOA-PPTest4576: High Energy Density Laboratory Plasmas
* Institution	Abilene Christian University, Abilene, TX

**\* PI Information ?** Change PI

Name	Ennaciri, cbahia
Email Address	cbahia@gmail.com
Phone Number	703-729-7654
Address	12345 cbahia street, Ashburn, VA 20147

**Project Information**

* Preproposal Title	
* Program Manager	Select One

▼ Preproposal (Maximum 1) Attach File

No documents attached

Cancel Save Submit to DOE

5. Click the **Attach File** button and select a file from your computer.
6. Click the **Attach** button to attach the Preproposal document.
7. Click the **Save** button to save the document in the *My Preproposals* list page for later completion.
8. Click the **Submit to DOE** button to submit the Preproposal.
9. PAMS will send an email acknowledging receipt of the submission to the PI.

### 3.3.4.2 Create and Submit a Letter of Intent

Follow the steps below to create and submit a Letter of Intent:

1. Click the **Actions/Views** link and then click the **Submit Letter of Intent** link (Figure 74).



**Figure 74. Funding Opportunity Announcements List - Submit Letter of Intent Link**

2. Provide the required information on the *Submit Letter of Intent* page. To choose a PI click the **Select PI** button (Figure 75).

**Figure 75. Submit Letter of Intent (LOI) Page - Select PI Link**

3. Search for the PI using the search criteria. Click the **Action** link against the PI record and then click **Select PI**. If the PI is not registered to the Institution in PAMS, click the **Invite PI** link (Figure 76).



Figure 76. Select PI Page - Select PI Link

Name	User Name	Email	Phone	Options
Smith, Karen	extuser1	reitester155@gmail.com	703-222-2222	Actions
Bennani, Kawtar	kbennani	bennani@gmail.com	202-204-7654	
User, REI	REIUser	reitester3@gmail.com	703-480-9678	Action <b>Select PI</b>
Ennaciri, Youssef	youssef	yennaciri1@gmail.com	202-555-6545	Actions

4. Complete the form by entering the required information (Figure 77). Note that fields marked by a red star are mandatory. Click **Attach File** and select your file. Click the **Attach** button to attach the Letter of Intent document. Click **Save** to save the document in the *My Letters of Intent* list page for later completion. Click **Submit to DOE** to submit the Letter of Intent.
5. PAMS will send an email acknowledging receipt of the submission to the PI.



**Figure 77. Submit Letter of Intent (LOI) Page – Submit to DOE Link**

### Submit Letter of Intent (LOI)

Complete the form below to submit a Letter of Intent (LOI). Search for and add only one PI. If the PI is not registered, send an invitation to the PI to register to the ([View More](#))

<b>Solicitation Information</b>	
Solicitation Number	DE-FOA-LOITest789: Low Solar research
* Institution	Adelphi University, Long Island, NY
<b>* PI Information</b> <a href="#">?</a> <a href="#">Change PI</a>	
Name	Smith, Karen
Email Address	reitester155@gmail.com
Phone Number	703-222-2222
Address	PO BOX 12345 20151
<b>Project Information</b>	
* Letter of Intent Title	
* Program Manager	Select One
<b>Letter of Intent (Maximum 1)</b> <a href="#">Attach File</a>	
No documents attached	
<a href="#">Cancel</a>	<a href="#">Save</a> <a href="#">Submit to DOE</a>

### 3.3.4.3 Create and Submit a Proposal

You can submit a Proposal in PAMS only in response to DOE National Laboratory Announcements. For Funding Opportunity Announcements, Proposals must be submitted through Grants.gov only.

Follow the steps below to create and submit a Proposal in response to a DOE National Laboratory Announcement:

1. Search for DOE National Laboratory Announcements from the *Search Solicitations* tab. Click the **Actions/Views** link for a Solicitation and then click the **Submit Proposal** link (Figure 78).



**Figure 78. DOE National Laboratory Announcements List - Submit Proposal Link**

DOE National Laboratory Announcements - List

Detailed View | Search

Filters Applied (x Clear)

Page size: 15 | Go | 1 items in 1 page(s)

Solicitation Number	Solicitation Title	LOI/Preproposal Due Date	Proposal Due Date	Options
LAB 09-24				
LAB 09-24	Topical Collaborations in Nuclear Theory	4/9/2012 4:36:00 PM	5/31/2012 11:59:59 PM	Actions/Views

Submit Proposal

View Lab Announcement

2. Provide the required input information on the *Cover Page* (Figure 79). Note that fields marked by a red star are mandatory.

**Figure 79. Cover Page - Top**

Cover Page Budget Subawards (optional) Attachments

Fields with \* are required

**Solicitation Information**

Solicitation Number: TA-Sol-LOI-223451: TA-Sol-LOI-223451

\* Institution: Select One

**\* Principal Investigator Information** Change PI

Name: Rick, Hello

Position/Title of PI:

Phone Number: 123-456-7897

Email Address: reitester1120211@gmail.com

Address: HC 908 BOX 1235, Herndon, VA 20175

**Project Information**

\* Proposal Title: test

\* Program Manager: Select One

\* Proposal Type: New

Field Work Proposal Number (if applicable):

#	FWP Number	Target Year
1.	555555555555	2013

3. From the *Choose Action* drop-down, select the save option of choice and click the **Go** button to start working on the *Budget* section.



**Figure 80. Cover Page - Research and Other Related Project Information**

**Research and Other Related Project Information**

**\* 1. Are Human Subjects Involved?**

Yes  No

**1a. If Yes, is the project exempt from Federal regulations?** *(Required only if the answer to question 1 is 'Yes')*

Yes  No  N/A

If Yes, check appropriate exemption number. *(Required only if the answer to question 1a is 'Yes')*

1  2  3  4  5  6  N/A

If No, is the IRB review pending? *(Required only if the answer to question 1a is 'No')*

Yes  No  N/A

IRB Approval Date:

Human Subject Assurance Number:

**\* 2. Are vertebrate animals used?**

Yes  No

**2a. If Yes, is the IACUC review pending?** *(Required only if the answer to question 2 is 'Yes')*

Yes  No  N/A

IACUC Approval Date:

Animal Welfare Assurance Number:

Cancel Choose Action



4. On the *Budget* page (Figure 81), provide the necessary information for each year (fields marked by a red star are mandatory). Complete each section by clicking the icon against each section (Figure 82, Figure 83).



**Figure 81. Budget Tab - Top Section**

The screenshot displays the 'Budget Tab' interface with the following elements:

- Navigation tabs: Cover Page, Budget, Subawards (optional), Attachments.
- Buttons: Add Budget Period (with a red arrow pointing to it), Budget Tab Instructions, Copy from Previous Period (with a red arrow pointing to it).
- Table of Budget Periods:

Budget Period	Start Date	End Date	Delete Period
1	Not Provided	Not Provided	
2	Not Provided	Not Provided	Delete
- Period Selection: Period 1, Period 2 (selected), Budget Summary.
- Budget Period Information section (with a red arrow pointing to the edit icon):
  - Budget Period Start Date: Not Provided
  - Budget Period End Date: Not Provided
- A. Senior/Key Person section (with a red arrow pointing to the edit icon):

#	Name	Project Role	Months	Requested Salary (\$)	Fringe Benefits (\$)	Funds Requested (\$)
Total Senior/Key Person						Not Provided

**Note** *When entering budget information for multiple budget periods, you may enter the first budget period's information and click the Copy From Previous Period link (which appears in the screenshot immediately above) to copy data over from the previous period. This will eliminate you having to duplicate budget information for every year; you will merely have to edit the information after copying it over.*



**Figure 82. Budget Tab - Middle Section**

B. Other Personnel					
# of Personnel	Project Role	Months	Requested Salary(\$)	Fringe Benefits (\$)	Funds Requested (\$)
Total Other Personnel					Not Provided
Total Salary, Wages and Fringe Benefits (A+B)					\$0.00
C. Equipment Description					
#	Equipment Item				Funds Requested (\$)
Total Equipment					Not Provided
D. Travel					
#	Item				Funds Requested (\$)
1.	Domestic Travel Costs (Incl. Canada, Mexico, and U.S. Possessions)				Not Provided
2.	Foreign Travel Costs				Not Provided
Total Travel					\$0.00
E. Participant/Trainee Support Costs					
#	Item				Funds Requested (\$)
1.	Tuition/Fees/Health Insurance				Not Provided
2.	Stipends				Not Provided
3.	Travel				Not Provided
4.	Subsistence				Not Provided
5.	Other				Not Provided
Number of Participant/Trainees (Not Provided)					
Total Participant/Trainee Support Costs					\$0.00
F. Other Direct Costs					
#	Item				Funds Requested (\$)
1.	Materials and Supplies				Not Provided
2.	Publication Costs				Not Provided
3.	Consultant Services				Not Provided
4.	ADP/Computer Services				Not Provided
5.	Subawards/Consortium/Contractual Costs				Not Provided
6.	Equipment or Facility Rental/User Fees				Not Provided
7.	Alterations and Renovations				Not Provided
8.	Other				Not Provided
Total Other Direct Costs					\$0.00

- From the *Choose Action* drop-down, select the save option of choice and click the **Go** button to continue to the next section (Figure 83).



Figure 83. Budget Tab - Bottom Section

		Total Other Direct Costs	\$0.00
<b>G. Direct Costs</b>			
#	Item	Funds Requested (\$)	
1.	Total Direct Costs (A thru F)	\$0.00	
<b>H. Other Indirect Costs</b>			
#	Item	Funds Requested (\$)	
		Total Indirect Costs	Not Provided
<b>I. Total Direct and Indirect Costs</b>			
#	Item	Funds Requested (\$)	
1.	Total Direct and Indirect Costs (G+H)	\$0.00	

Back Choose Action

6. Use the **Subawards** tab only if you are submitting separate budgets for subawards. If not, please ignore this section and leave it blank. To provide subaward budgets:
  - a. Go to the *Subawards* tab and click the **Add Subaward** link (Figure 84).
  - b. Provide budget information (similar to the *Budget* page information in Step 4 above) for each subaward you wish.
  - c. When you have finished providing the necessary information, choose the appropriate save option from the *Choose Action* drop-down. Click the **Go** button to continue to the next section.

Figure 84. Subawards Tab - Add Subaward Link

Cover Page  
  Budget  
  Subawards (optional)  
  Attachments

DUNS
Institution
Options

No Subawards found.

Back Choose Action

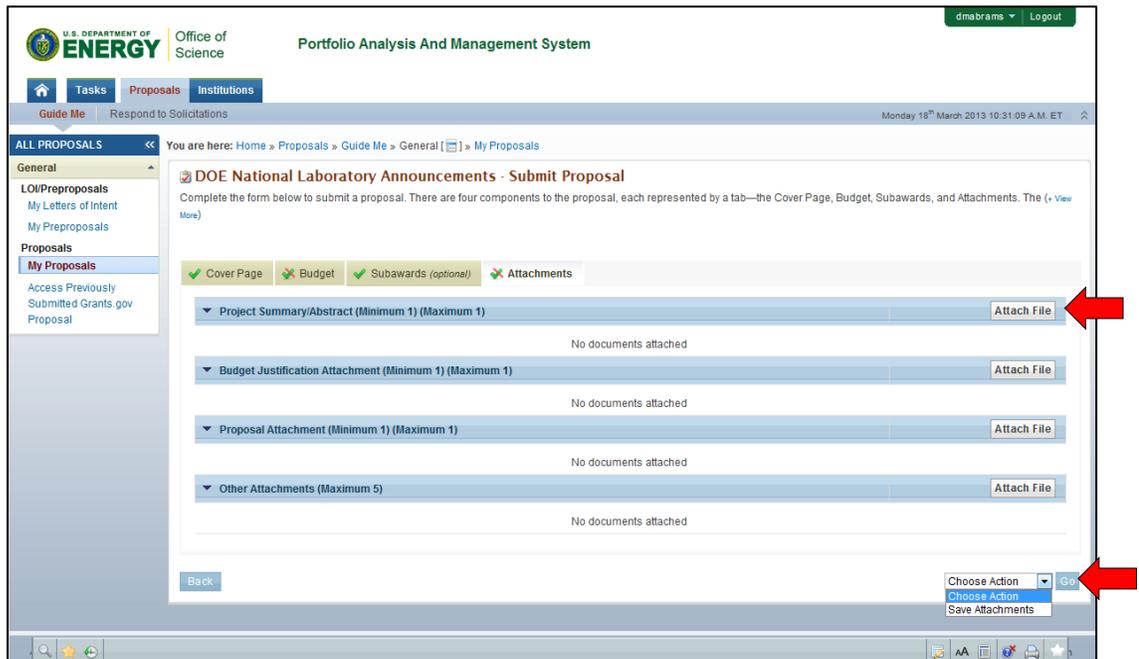
7. On the *Attachments* tab (Figure 85), upload any necessary attachments (for more information on attaching files in PAMS, refer to Section 2.8, *How to Attach a File in PAMS*). Choose **Save Attachments** to do so. Once all sections are complete, choose **Submit to DOE** from the *Choose Action* drop-down.

**Note** *The Proposal Summary/Abstract and the Budget Justification attachments are mandatory for you to attach along with the Proposal.*

8. Click the Go button to submit the Proposal to DOE.



Figure 85. Attachments Tab



### 3.3.4.4 Reopen and Resubmit a Submission



*Once you have reopened a submission, you can modify and resubmit it to DOE. Please note, however, that once reopened, a submission will no longer be considered by DOE until you resubmit it.*

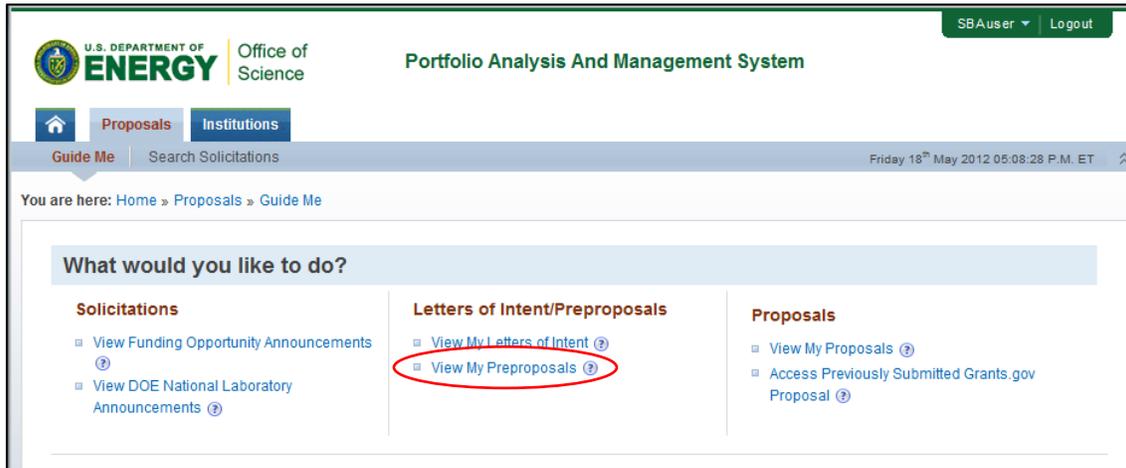
*In addition, once the due date has passed, you WILL NOT be able to make the resubmission to DOE.*

You can reopen a submitted Preproposal, Letter of Intent, or Proposal (only for lab and interagency Proposals submitted in PAMS); modify it; and resubmit it before the due date of the original submission. Follow the steps below to reopen a submission:

1. Click the **Proposals** tab (Figure 86).
2. Click the **View My Letters of Intent**, **View My Preproposals**, or **View My Proposals** link to navigate to the respective list.

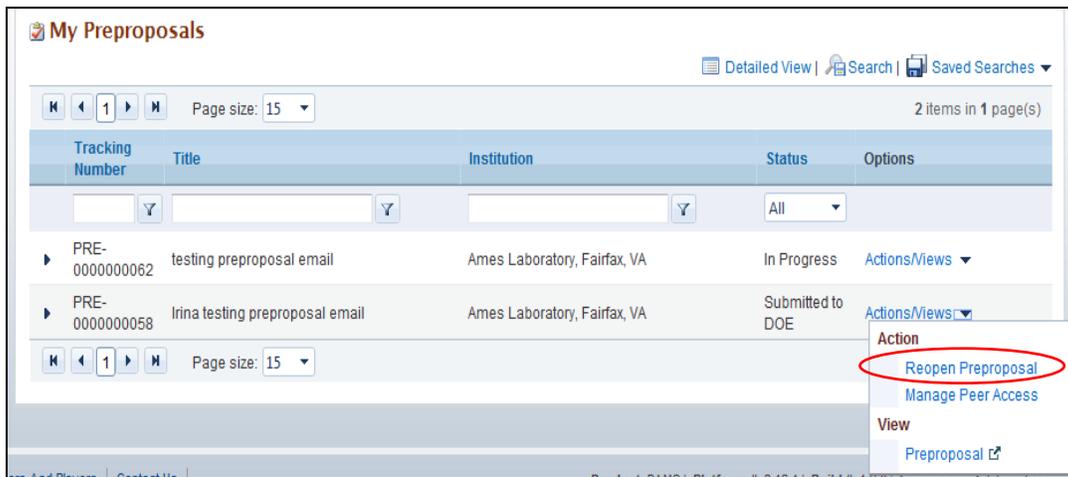


Figure 86. Proposals Tab



3. From the *My Letters of Intent*, *My Preproposals*, or *My Proposals* page, click the **Action** link.
4. Click the **Reopen Preproposal**, **Reopen Letter of Intent**, or **Reopen Proposal** link to reopen a submission that has already been submitted to DOE (Figure 87).

Figure 87. Reopen Proposal Link



5. Edit the Preproposal, Letter of Intent, or Proposal, as required, and resubmit it to DOE using the options at the bottom of the page.

### 3.3.4.5 I Have Received an Invitation from DOE to Submit a Proposal in PAMS



***This applies to National Labs and other federal agencies only.***

DOE can send invitations to National Labs and other federal agencies to submit Proposals. These invitations are sent as emails, and recipients must be registered to both the Institution and to PAMS to submit a Proposal.



A link in the email enables you to submit a Proposal. Clicking this link will 1) ask you to login to PAMS, 2) automatically create a Proposal, and 3) take you to the *My Proposals* page. Then proceed as follows:

1. Once you are on your *My Proposals* page, edit the “In Progress” Proposal with the title *Invite to Submit to the DOE Office of Science*.
2. To edit the Proposal, select **Edit Proposal** under Actions/Views. To allow another person to edit the Proposal, you must give that person peer access by selecting **Manage Peer Access** under Actions/Views.
3. Refer to the [Create and Submit a Proposal](#) section of this document for detailed instructions on how to submit a Proposal in PAMS.



***The proposal created will be assigned to the user who first clicks on the link in the email.***

#### **3.3.4.6 I Want To View Submissions from My Institutions**

Follow the steps below to view any submissions associated with an Institution. You can view a submission if you are the PI on the submission, if you are the submitter, or if an individual with access to the submission grants you access via the Manage Peer Access functions.

1. Click the **Proposals** tab
2. Click **View My Preproposals**, **View My Letters of Intent**, or **View My Proposals** to see the list of submissions.
3. Click **Actions** and then click the **View** link to view the submission.

#### **3.3.4.7 I Want To Manage Peer Access for a Submission**

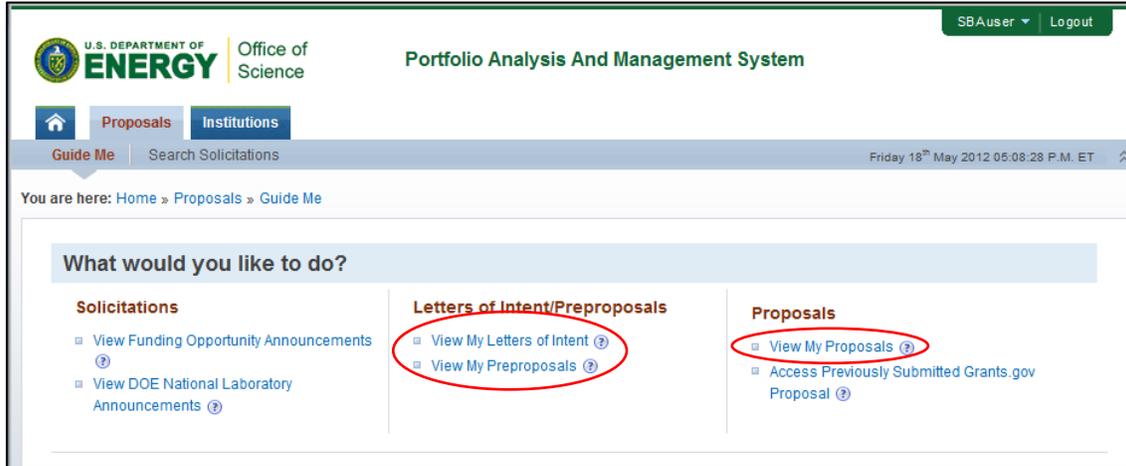
Peer Access is the concept of allowing select users to access submissions in PAMS. Peer Access can be managed at a submission level, by the users who created the submissions, from the *My Proposals*, *My Preproposals*, and *My Letters of Intent* pages.

Peer access can also be managed at an Institution level, from the *Institution Folder*, by users who have Administrative privileges. Peer Access can be extended only to users who are registered to the same Institution. Follow the steps below to manage peer access for a submission:

1. Click the **Proposals** tab after logging in to PAMS. Click the appropriate **View** links (Figure 88).

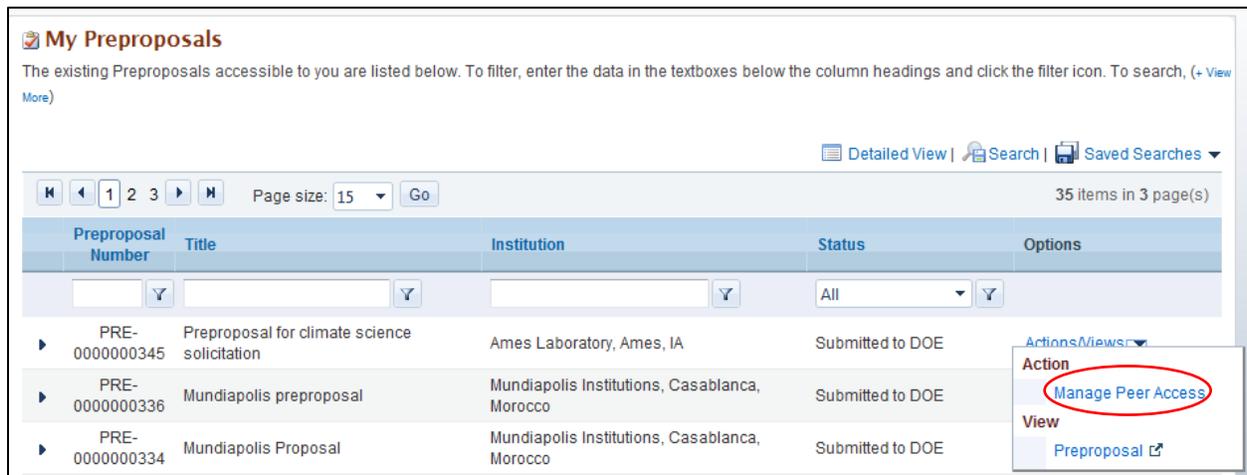


**Figure 88. Links for View My Letters of Intent, View My Preproposals, View My Proposals**



2. This will take you to the *My Preproposals*, *My Letters of Intent*, or the *My Proposals* page. Choose a submission record, click the **Action** link, and then click the **Manage Peer Access** link (Figure 89).

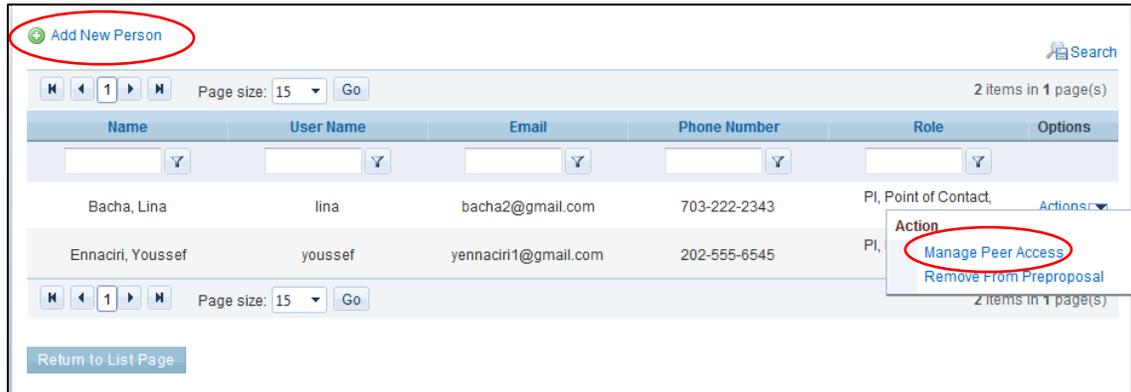
**Figure 89. Manage Peer Access Link**



3. You will now be taken to the *Manage Peer Access - User List* page (Figure 90). Click the **Add New Person** link to add a new user registered to the Institution to the submission. Click **Manage Peer Access** to manage existing user access.

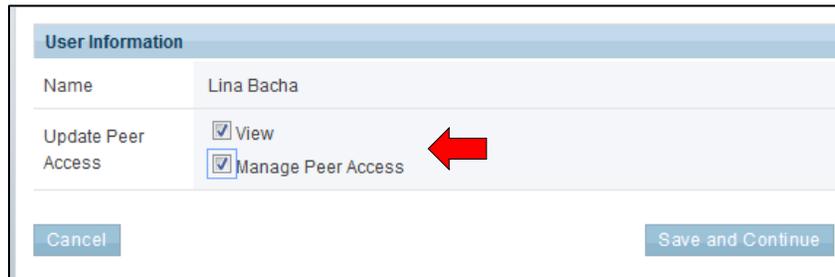


**Figure 90. Add New Person/Manage Peer Access Links**



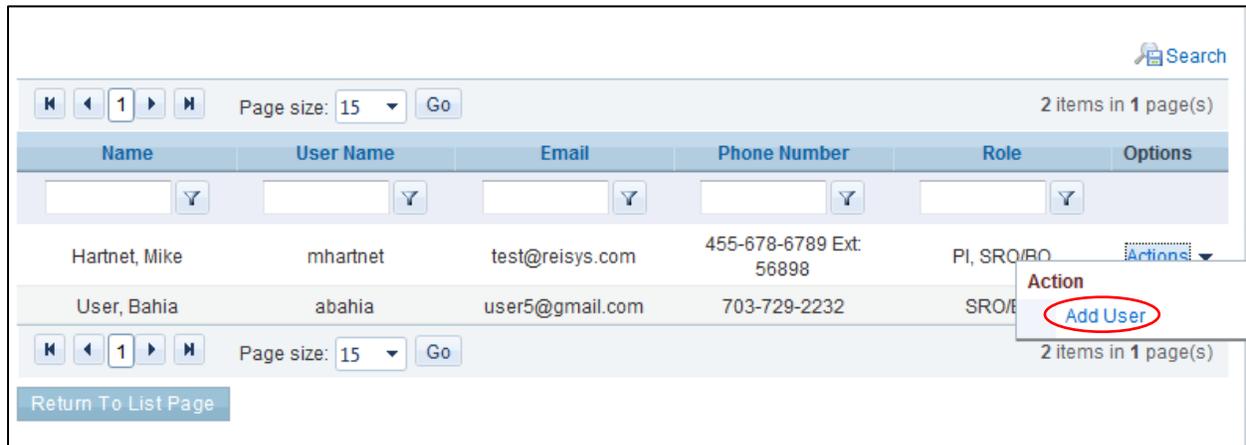
4. Select check boxes to update peer access for users (Figure 91).

**Figure 91. User Information**



5. When you click **Add User**, you are taken to list page of existing users from your institution. Choose a user record, click the **Action** link, and then click **Add User** (Figure 92).

**Figure 92. Existing Users Page: Add User Link**



6. On the *Manage Peer Access – User* page, choose the privileges to be assigned to the user and click the **Save and Continue** button (Figure 93).



**Figure 93. Manage Peer Access - User Page: Save and Continue Button**

7. You are taken to the *View Users – List* page, where you will see a *Success* message. The new user will be displayed in the page’s grid.

**Note** *For submissions with the status “Submitted to DOE,” the only privileges that can be managed are View and Manage Peer Access. For “In Progress” submissions, the following privileges can be managed:*

- View
- Edit
- Delete
- Submit to DOE
- Manage Peer Access.

**Note** *Any users with the Edit, Delete, Submit to DOE, or Manage Peer Access privilege will, by default, be assigned the View privilege. If you are the submission creator, you will be assigned all submission-level privileges by default. If you are the PI, but someone else submitted on your behalf, you will be assigned View privilege by default.*

### 3.4 Proposal Review

Research funding from the DOE Office of Science is awarded through a merit-based selection process. Merit review means a thorough, consistent, and objective examination of Proposals, based on pre-established criteria by persons who are:

- Independent of those submitting the applications
- Knowledgeable in the field of endeavor for which support is requested.

PMs perform initial evaluations of all applications to ensure that the required information is provided, the proposed effort is technically sound and feasible, and that the effort is consistent with program-funding priorities.

For Proposals that pass the initial evaluation, program managers use peer review to evaluate them, based on criteria specified in 10 CFR 605. Common review criteria are:

- Scientific and/or technical merit of the project
- Appropriateness of the proposed method or approach
- Competency of applicant’s personnel and adequacy of proposed resources



- Reasonableness and appropriateness of the proposed budget
- Other notable factors established and set forth in a notice of availability or in a specific Solicitation.

This section covers the Proposal review tasks assigned to reviewers within PAMS. Proposals assigned to reviewers for review show up as tasks in PAMS. To learn how to view and access your tasks, refer to Section 2.7, *Access Tasks*. This section provides detailed instructions to perform a Proposal review task in PAMS.

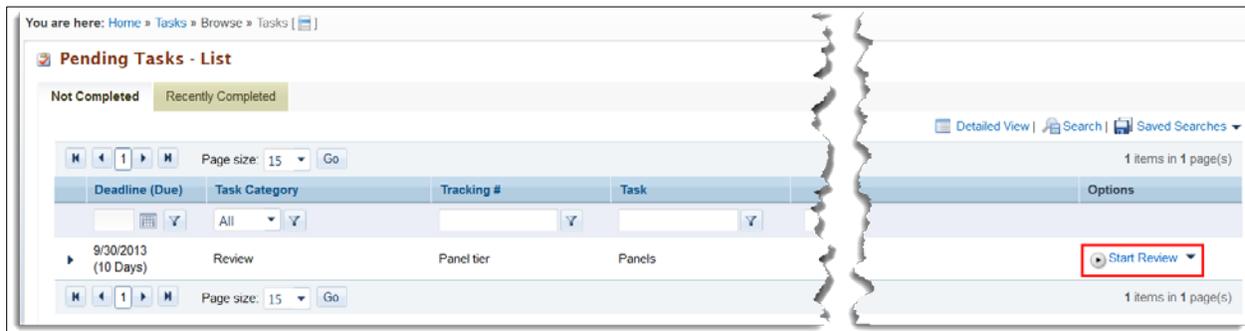
### 3.4.1 How Do I Perform Proposal Review?

When Proposals are assigned to you for review by DOE Staff, a review task will be assigned to you in PAMS. A review task can be of one of the following types:

1. **Mail In Review:** Mail In reviews are performed one proposal at a time in PAMS. Each Proposal assigned to you for a mail-in review appears as a separate pending task in PAMS. You can view the Proposal details, enter your evaluation, and submit the Proposal review to the DOE Office of Science.
2. **Panel Review:** For typical panel reviews, 10-15 reviewers convene in a conference room and submit reviews. Each reviewer provides his or her own input. Each panel appears as a single task in PAMS. All Proposals within the panel are available from the single task. You can view each Proposal, enter your evaluation, and submit the Proposal review to the DOE Office of Science from within the Panel Review task.
3. **Scoring Only:** As a follow-up to a panel, Proposals within the panel are scored or ranked. A single task is created in PAMS for a reviewer to score or rank multiple Proposals. You can enter a score or rank, provide comments for each Proposal in the task, and submit the same to the Office of Science.

The *Task* field on the *Pending Tasks – List* page (Figure 94) displays the review type of the task.

**Figure 94. Pending Tasks – List Page**



#### 3.4.1.1 Conflict of Interest (COI) Certificate

As a reviewer, you are required to comply with COI rules. You have a COI if:

- Reviewing particular material would have a direct and predictable effect on any person, company, or organization with which you have a relationship—financial or otherwise.



- The interests of your spouse, minor child, general partner, or organization in which you serve as an officer, director, trustee, general partner, or employee—and any person or organization with whom you are negotiating employment—are attributed to the reviewer.

In other words, if you believe that performing a review you have been assigned will affect you, a family member, current or potential business partner or fellow business officer, or any current or potential employer, you have a COI.



***If you have any questions about what constitutes a COI, contact the program manager.***

You must agree to disclose any COIs discovered during the course of the review process. PAMS enables you to view the Solicitation and Proposal Abstract information. Based on this information, you can decide initially if you have a conflict in reviewing the Proposal. You can read the COI certificate (Figure 95) and choose from the following three options:

1. ***I have no Conflict of Interest in reviewing this proposal:*** Select this option to declare that you do not have a COI with the Proposal and to view the Proposal and being the review process
2. ***I have a Conflict of Interest in reviewing the proposal:*** Select this option to declare that you have a COI with the Proposal and do not wish to view or review the Proposal.
3. ***I have no Conflict of Interest but do not wish to review the proposal:*** Select this option to decline the Proposal in spite of not having a COI with the Proposal.



***If you declare a COI for a Proposal or decline to review the Proposal, the Proposal will no longer be available to you. You will need to contact the PM and request to reopen the Proposal review task.***

Select the appropriate option and click the **Save and Continue** button on the COI Certificate page (Figure 95).



Figure 95. Proposal Review COI Certificate

**Proposal Review - Conflict of Interest Certificate**

**Solicitation Details**

Title: High-Energy-Density Laboratory Plasma Science

Synopsis: The Fusion Energy Sciences (FES) program of the Office of Science (SC) and the Office of Stockpile Stewardship of the Defense Programs (DP) of the National Nuclear Security Administration (NNSA), both of the U.S. Department of Energy (DOE), jointly announce their interests in receiving grant applications for new awards for research in the SC-NNSA Joint Program in High-Energy-Density Laboratory Plasmas (HEDLP). Principal Investigators who currently have awards through the joint HEDLP program should not apply.

**Proposal Details**

Proposal ID: 0000205522

Title: Development of Methods for Compression of Ultra-High Power Laser Pulses

PI: Chytkov, Vladimir

Institution: Regents of the University of Michigan, Ann Arbor, MI

Abstract: Proposal Abstract

Collaborative Proposals: No Collaborative Proposals Found.

**Conflict Of Interest Certificate**

U.S. DEPARTMENT OF ENERGY OFFICE OF SCIENCE CONFLICT OF INTEREST AND CONFIDENTIALITY CERTIFICATE

Information on Conflict of Interest

The DOE Office of Science has a policy that individuals with a conflict of interest cannot participate in the merit review of a proposal for funding. You may not participate in the review of any proposal involving a particular matter that would have a direct and predictable effect on any person, company or organization with which you have a

**Comments**

Approximately 1 page (Max 2000 Characters): 2000 Characters left.

Buttons: Cancel, Save and Continue

Footer: Acceptable Use Policy | Viewers And Payers | Contact Us | PAMS External User Guide | Product: PAMS | Platform #: 2.22.3 | Build #: 1.4.0 | Environment: Integration | Last Login: 03/06/13 1:30:06 PM ET

3.4.1.2 View Proposal Information and Review Instructions - Proposal Header

After the COI Certificate is read and you agree that no COI exists with you reviewing the Proposal, PAMS takes you to the *Proposal Review – Instructions to Reviewers* page (Figure 96). This page displays a Proposal Header followed by instructions from the DOE Office of Science staff. A link to the Proposal can be found in the Proposal header under *Resources*.

Figure 96. Instructions to Reviewers

**Proposal Review - Instructions to Reviewers**

0000204133: UNIVERSITY OF SOUTHERN CALIFORNIA, LOS ANGELES, California PI: VASHISHTA, PRIYA

**Proposal Title:** SELF-HEALING NANOMATERIALS: MULTIMILLION-ATOM REACTIVE MOLECULAR DYNAMICS SIMULATIONS

**Solicitation:** DE-FOA-0000768 - FY 2013 Continuation of Solicitation for the Office of Science Financial Assistance Program

**Reviewer Category:** Tertiary

**Resources**

Supporting Additional

Solicitation Proposal Instructions

**Instructions to Reviewers**

Please provide a narrative response under each review criterion.

Buttons: Cancel, Continue

The *Proposal Header* component enables you to view the following details:



**Table 3. Proposal Header**

Section	Description
Proposal Header	The Proposal header, by itself, displays the Proposal ID, Institution, and the PI on the Proposal. Click the  icon on the header to expand the header. The expanded section displays the <i>Proposal Title</i> , <i>Solicitation</i> number and title, and <i>Reviewer Category</i> assigned to you for reviewing the Proposal.
Resources Header	<p>The <i>Resources</i> header, by default, is always expanded and provides links to view the following documents in PAMS:</p> <p><b>Supporting tab</b></p> <ul style="list-style-type: none"> <li>• <i>Solicitation</i>: Displays the Solicitation as a PDF document.</li> <li>• <i>Proposal TOC</i>: Displays different sections within the Proposal as a table of contents. Click on a topic to view more information on the topic.</li> <li>• <i>Proposal</i>: Displays the Proposal in pdf format.</li> <li>• <i>Instructions</i>: Displays the <i>Instructions to Reviewers</i> provided by DOE Office of Science staff.</li> </ul> <p><b>Additional tab</b></p> <ul style="list-style-type: none"> <li>• Conflict of Interest: Allows you to declare a COI at any time while reviewing the proposal</li> <li>• Points of Contact: Displays a list of all points of contact for reviewers from DOE Office of Science.</li> <li>• Each link opens in a separate window on your browser.</li> </ul>

 **The Proposal Header will be displayed on all review pages to allow you to access Proposal and Solicitation information readily.**

### 3.4.2 How Can I Perform a Mail In Review?

 **Both Mail In Review and Commercialization Review tasks will be created as Mail In Review tasks in PAMS. Commercialization Reviews are applicable to SBIR Proposals only.**

1. Click the **Mail In Review** link on the left navigation menu (Figure 97) to view all the *Mail In Review* tasks.
2. Find the Mail In Review task you want to work on. If necessary, you can click the **Search** link at the top of the page to perform a search.
3. Click the **Actions** and **Start Review** links in the *Options* column to go to the *Proposal Review - Conflict of Interest Certificate* page (Figure 95).



**Figure 97. Mail In Reviews List – Action Links**

The screenshot shows the 'Mail In Reviews - List' page in the Portfolio Analysis And Management System. The page header includes the U.S. Department of Energy logo, 'Office of Science', and the system name. A navigation menu on the left lists 'Tasks', 'Proposals', and 'Institutions'. The main content area displays a table with columns: Due In, Review Deadline Date, Proposal ID, PI, Institution Name, Review Status, and Options. Two rows of data are visible, both with 'In Proc' status. An 'Action' dropdown menu is open over the second row, showing options: 'Edit Review' and 'Declare Conflict Of Interest'.

Due In	Review Deadline Date	Proposal ID	PI	Institution Name	Review Status	Options
N/A		0000202467	LIVNY, MIRON	Board of Regents of the University of Wisconsin-Madison, Madison, WI	In Proc	Action
N/A		0000202466	LIVNY, MIRON	Board of Regents of the University of Wisconsin-Madison, Madison, WI	In Proc	Action

4. On the *Proposal Review - Conflict of Interest Certificate* page, scan the Solicitation and Proposal details, along with the abstract, to determine if you have a COI with the Proposal, Institution, or any of the applicants.
5. Read the COI certificate and then select the appropriate option (see Section 3.4.1.1).
6. If you selected *I have no Conflict of Interest in reviewing the Proposal*, click the **Save and Continue** button and proceed as follows:
  - a. On the *Proposal Review - Instructions to Reviewers* page (Figure 96), read the instructions and click the **Continue** button to go to the *Update Review* page (Figure 98).
  - b. You can update the review form and click the **Save and Submit** button to preview the comments entered.
  - c. You can choose to email a copy of the review to your primary email address by checking the **Email Myself a Copy** box (Figure 99).
  - d. Submit the review to DOE by clicking the **Confirm** button (Figure 99). At that point, the task is removed from your queue.
  - e. PAMS will send an email to the reviewer acknowledging submission of the review.

**Note** *PAMS will time out your session every 30 minutes. Please save your review information every 15 minutes. You can save your review by clicking the Save button at the bottom of the screen or by clicking the save icon  on the Floating Toolbar at the bottom of the page (refer to [System Navigation](#), Item 8).*



Figure 98. Update Review: Save and Submit

Figure 99. Proposal Review: Email Myself a Copy



Note

**Once a review has been submitted to DOE, the task is closed. You no longer have access to the review or Proposal in PAMS. To request re-opening the review, contact the appropriate program office of the DOE Office of Science.**

7. If you selected *I have a Conflict of Interest in reviewing the Proposal*, enter comments to be shared in an email with the program manager. Then click the **Save and Continue** button. The task is removed from your *Pending Tasks* queue.

Note

**If you believe you declared a COI by mistake or would like to re-open the review, you should contact the appropriate program office of the DOE Office of Science.**

8. If you selected *I have no Conflict of Interest but do not wish to review the Proposal*, enter comments to be shared in an email with the program manager. Then click the **Save and Continue** button. The task is removed from your *Pending Tasks* queue.

Note

**If you selected this option by mistake or would like to re-open the review, you should contact the appropriate program office of the DOE Office of Science.**

### 3.4.3 How Can I Perform a Panel Review?

If you are a panelist, you are a reviewer with one of the following reviewer categories for each Proposal that you are able to submit review:

- Primary: You are a primary reviewer for the Proposal.
  - Secondary: You are a secondary reviewer for the Proposal.
  - Tertiary: You are the tertiary reviewer for the Proposal.
  - Reviewer: Categories have not been configured for this panel and everyone is a *Reviewer*.
  - Additional: The Proposal is not assigned to you. It is an *Other* Proposal in the panel, and you are able to view the Proposal but not necessarily provide a written review of it.
1. Click the **Panels** link in the left navigation menu to go to the *Panel Reviews - List* page (Figure 100). Here, you can view all the Panel Review tasks.



Figure 100. Panel Reviews List – Action Link

The screenshot shows the 'Panel Reviews - List' page in the Portfolio Analysis and Management System. The page includes a navigation menu on the left with options like 'Tasks', 'Proposals', and 'Institutions'. The main content area displays a table of panel reviews with columns for 'Due In', 'Panel Name', 'Panel Start Date', 'Panel End Date', 'Status', and 'Options'. The 'Options' column for the third row, 'Panel collaborative proposal for Radhika', has a red circle around the 'Action Start Review' link.

Due In	Panel Name	Panel Start Date	Panel End Date	Status	Options
38 Days	New Panel 1	2/9/2013 12:00:00 AM ET	3/31/2013 12:00:00 AM ET	In Progress	Actions
38 Days	New Panel 1	2/9/2013 12:00:00 AM ET	3/31/2013 12:00:00 AM ET	Not Started	Action Start Review
16 Days	Panel collaborative proposal for Radhika	2/11/2013 3:56:32 PM ET	3/9/2013 12:00:00 AM ET	In Progress	Actions
38 Days	New Panel 1 view al submit all	2/12/2013 9:51:43 AM ET	3/31/2013 12:00:00 AM ET	In Progress	Actions
38 Days	Panel Ser 500	2/13/2013 12:00:00 AM ET	3/31/2013 12:00:00 AM ET	Not Started	Actions

2. Find the Panel Review task you want to work on. If necessary, you can click the **Search** link at the top of the page to perform a search. Click the **Start Review** link in the *Options* column to go to the *Panel Review* page (Figure 101).
3. On the *Panel Review* page, you can view the list of Proposals that you have access to. With Panel Reviews, a single task is created for all Proposals within the panel.
4. Proposals in the panel can be viewed in one of these three grids:
  - *Proposal Assignments Waiting to be Accepted.*
  - *Proposal Assignments Accepted.*
  - *Other Proposals.*



Figure 101. Panel Review Page

The screenshot displays three distinct sections on the Panel Review page, each with a table of proposal data and navigation controls. Red arrows point to the left side of each section header.

- Proposal Assignments Accepted:** Shows 0 items in 1 page(s). The table is empty.
- Proposal Assignments waiting to be Accepted:** Shows 3 items in 1 page(s). The table contains three rows of proposals.
- Other Proposals:** Shows 1 item in 1 page(s). The table contains one row of a proposal.

Proposal ID	Institution	PI	Category	Options
0000202433	Tech-X Corporation	Shasharina, Svetlana	Additional	Actions
0000202439	University of Memphis	Wu, Qishi	Additional	Actions
0000202438	University of Memphis	Wu, Qishi	Additional	Actions
0000202446	Arizona Board of Regents for Arizona State University	Chen, Yi	Additional	Views

### 3.4.3.1 Proposal Assignments Waiting To Be Accepted

This is the second grid on the *Panel Review* page (Figure 101). This grid (Figure 102) displays the list of Proposals you can submit reviews for. The *Category* column displays whether the Proposal is assigned or unassigned (other) Proposal. The *Category* for unassigned Proposals is *Additional*.

1. Select a Proposal to review.
2. In the *Options* column, click the **Actions** link and then the **Accept/Reject Assignment** link. This will take you to the *Proposal Review - Conflict of Interest Certificate* page (Figure 95).



Figure 102. Proposal Assignments Waiting to be Accepted

Proposal ID	Institution	PI	Category	Options
0000202433	Tech-X Corporation	Shasharina, Svetlana	Additional	Action
0000202439	University of Memphis	Wu, Qishi	Additional	Accept/Reject Assignment
0000202438	University of Memphis	Wu, Qishi	Additional	

3. On the *Proposal Review - Conflict of Interest Certificate* page, view the Solicitation and Proposal details section to determine if you have a COI with the Proposal, Institution, or any of the applicants.
4. Read the COI certificate and then select the appropriate option (see Section 3.4.1.1). If you selected *I have no Conflict of Interest in reviewing the Proposal*, click the **Save and Continue** button and proceed as follows:
  - a. On the *Proposal Review - Instructions to Reviewers* page (Figure 96), read the instructions.
  - b. Click the **Continue** button to go to the *Update Review* page (Figure 98).
5. You can update the review form and click the **Save and Submit** button to preview the comments entered.
6. You can choose to email a copy of the review to your primary email address by checking the **Email Myself a Copy** box (Figure 99).
7. Submit the review to DOE by clicking the **Confirm** button.
8. PAMS will send an email to the reviewer acknowledging submission of the review.
9. You may reopen the review, edit it, and resubmit it, as many times as you like, until the program manager closes the panel.

**Note**

**Once a review has been submitted to DOE, the Proposal review will be available for re-opening and resubmitting on the Panel Review page. The Proposal review will available only until the panel review task is open in your pending tasks queue.**

10. If you selected *I have a Conflict of Interest in reviewing the Proposal*, enter comments to be shared in an email with the program manager. Then, click the **Save and Continue** button. The proposal is removed from your panel task.

**Note**

**If you believe you declared a COI by mistake or would like to re-open the review, you should contact the appropriate program office of the DOE Office of Science. You can still view the Proposal review record on the Panel Review page. However, no actions can be performed on or information viewed for the Proposal review.**

11. If you selected *I have no Conflict of Interest but do not wish to review the Proposal*, enter comments to be shared in an email with the program manager. Then, click the **Save and Continue** button. The proposal is removed from your panel task.



**If you selected this option by mistake or would like to re-open the review, you should contact the appropriate program office of the DOE Office of Science. You can still view the Proposal review record on the Panel Review page. However, no actions can be performed on or information viewed for the Proposal review.**

12. Once you have taken an action on the Proposal, the Proposal is moved into either the *Proposal Assignments Accepted* grid or to the *Other Proposals in the Panel* grid, based on the reviewer category.

### 3.4.3.2 Proposal Assignments Accepted

This grid (Figure 103) displays the list of assigned Proposals that you have signed a COI Certificate for and accepted for review.

1. Select a Proposal review to update.
2. Click the **Actions/Views** and then click the **Update Review** link in the *Options* column to start entering review comments for the Proposal.

**Figure 103. Proposal Assignments Accepted: Action/View**



3. You can update the review form and click the **Save and Submit** button to preview the comments entered.
4. You can choose to email a copy of the review to your primary email address by checking the **Email Myself a Copy** box.
5. Submit the review to DOE by clicking the **Confirm** button. At this point, the task is removed from your queue.
6. If you wish to declare a COI for a review, then select the review and click the **Actions/Views** and **Declare Conflict of Interest** links. The review will still be available in the grid, but you will no longer be able to see the *Actions/Views* link in the *Options* column.

### 3.4.3.3 Other Proposals in the Panel

This grid (Figure 104) displays *Additional* Proposals you that you have signed a COI Certificate for and accepted for review.

1. Select a Proposal to update the review for. Click the **Actions/Views** and **Update Reviews** links in the *Options* column to start entering review comments for the Proposal.

**Figure 104. Other Proposals**

Proposal ID	Institution	PI	Category	Options
0000202446	Arizona Board of Regents for Arizona State University	Chen, Yi	Additional	View
0000202433	Tech-X Corporation	Shasharina, Svetlana	Additional	View Proposal

2. You can update the review form and click the **Save and Submit** button to preview the comments entered (Figure 98).
3. You can choose to email a copy of the review to your primary email address by checking the **Email a Copy to Myself** box (Figure 99).
4. Submit the review to DOE by clicking the **Confirm** button. The task will be removed from your queue at this point.
5. If you wish to declare a COI for a review, then select the review and click the **Actions/Views** link and the **Declare Conflict of Interest** link. The review will still be available in the grid, but you will no longer be able to see the *Actions/Views* link in the *Options* column.
6. In some cases, you will be able to see only the *Views* link under the *Options* column. This is intentional and has been set by the DOE Office of Science to allow you to only view the Proposal.
7. Viewing the Proposal also requires you to comply with and accept the COI statement.



**PAMS will time out your session every 30 minutes. Please save your review information every 15 minutes. You can save your review by clicking the Save button at the bottom of the screen or by clicking the save icon  on the Floating Toolbar at the bottom of the page (refer to [System Navigation](#), Item 8).**

### 3.4.4 How Can I Perform a Proposal Scoring Task?

Proposal Scoring tasks might be created to collect scores for Proposals that are part of a panel. These tasks are usually created in conjunction with panels, but after the panel reviews are complete. However, you could also be assigned a Proposal Scoring task either as a part of a panel or as an independent task.

1. Click on **Proposal Scoring** link available on the left-hand menu to go to the *Proposal Scoring - List* page (Figure 105) and view the Proposal Scoring tasks.



Figure 105. Proposal Scoring - List

**Proposal Scoring - List**

Search | Saved Searches

Page size: 15 Go 2 items in 1 page(s)

Due In	Review Deadline	Task	Round Name	Round Start Date	Round End Date	Status	Options
15 Days	05/01/2012	Score Proposal for Panel	Peer Review Round 2	05/01/2012	05/05/2012	In Progress	Action Start

Cancel

2. Select the task you want to work on and click the **Action** and **Start** links to begin.
3. On the *Proposal Rating* page (Figure 106), choose the Proposal for which you want to enter a score or a rank.
4. You may enter a numerical score within the allotted range, choose an adjectival score from the available drop-down, or enter comments about the score. One or more of these options are available, depending on the configuration set by DOE Office of Science for the task.

Figure 106. Proposal Rating

**Proposal Rating**

Note(s): Clicking on the Save button shall save information on this grid and rearrange the records, listing the records with a score first followed by records without a score.

Peer Review Round 1

Resources

**Panel Scoring**

Proposal ID	Title	Institution	PI	Rating
0000152954	Plant Study	Kansas State University, Manhattan, KS	Hansen, John	Range (0-10)
Comments: Maximum paragraph(s) allowed approximately: 3 (3000 character(s) remaining)				
0000453728	Infinite Energy Model Research	Kansas State University, Manhattan, KS	Davidson, Joe	Range (0-10)
Comments: Maximum paragraph(s) allowed approximately: 3 (3000 character(s) remaining)				
0000155285	Harnessing Nanotechnology for fusion	University of South Florida, Tampa, FL	Hayden, Russell	Range (0-10)
Comments: Maximum paragraph(s) allowed approximately: 3 (3000 character(s) remaining)				
0000109719	Geneva: An NLO event generator	Kansas State University, Manhattan, KS	Copeland, David	Range (0-10)
Comments: Maximum paragraph(s) allowed approximately: 3 (3000 character(s) remaining)				

Cancel Save Save and Submit



5. When you finish the scoring task, click the **Save and Submit** button to close the task and submit the scores to DOE.
6. PAMS will send an email to the reviewer acknowledging submission of the review.



***PAMS will time out your session every 30 minutes. Please save your scoring information every 15 minutes. You can save your scoring information by clicking the Save button at the bottom of the screen or by clicking the save icon  on the Floating Toolbar at the bottom of the page (refer to [System Navigation](#), Item 8).***



## APPENDIX A. GLOSSARY

Acronym/Term	Definition
COI	Conflict Of Interest
DOE	Department of Energy
ET	Eastern Time
FOA	Funding Opportunity Announcement
LOI	Letter of Intent
NDA	Non-Disclosure Agreement
PAMS	Portfolio Analysis and Management System
PDF or pdf	Portable Document Format: A document file format that captures and retains formatting styles. When a document is sent to a recipient in pdf format, it appears on the recipient's monitor or printer exactly as created by the sender.
PI	Principal Investigator
POC	Point of Contact
SC	Office of Science
SRO	Sponsored Research Officer
SRO/BO/AO	Sponsored Research Officer/Business Officer/ Administrative Officer



## APPENDIX B. PAMS HELPDESK CONTACT INFORMATION

If you have any questions regarding PAMS or if you have any trouble accessing your information in PAMS, please contact the PAMS Helpdesk staff as follows:

Phone	Hours of Operation	Email
(855) 818-1846 (toll free) or (301) 903-9610	9:00 a.m.–5:30 p.m., Eastern Time (ET), Monday–Friday	<a href="mailto:sc.pams-helpdesk@science.doe.gov">sc.pams-helpdesk@science.doe.gov</a>



## APPENDIX C. PROPOSAL PROCESS FLOW IN PAMS

Figure C-1 is a high-level flow diagram of the phases that a Proposal goes through in PAMS.

**Figure C-1. Proposal Process Flow in PAMS**

