Complete Progress Report

1 Introduction

Progress reports are created and submitted by external users with the appropriate privileges for every budget period of an award, with the exception of the last budget period. These reports are intended to show the Program Manager(s) (PMs) the current status of the award and describe how the funds provided have been used to further scientific research and studies.

The purpose of this document is to provide step-by-step instructions for users to follow to complete the Progress Report task.

2 Prerequisites

Before a Progress Report can be submitted, the following criteria must be met:

- A Progress Report task has been created.
- PAMS has sent an email to the PI requesting completion of a progress report.
- The external user (PI and SRO/BO/AO) has the edit and/or submit privilege for an active award.

3 Completing a Progress Report

Use the following steps to complete and submit a progress report.

3.1 Accessing the Progress Report Task

Use the following steps to access the progress report task.

3.1.1 Existing Account

Use the following steps to access the Progress Report task if the PI on the award has an existing external PAMS account.

1. PAMS will send an email notification to the PI indicating that the task has been created (*Figure 1*). Follow the **Portfolio Analysis and Management System (PAMS)** link provided in the email. **OR** Log in to the PAMS external website at http://pamspublic.science.energy.gov.

To:	PI
CC:	
From:	PAMS
Subject:	DOE Request to Submit a Progress Report for [Award Program Office Acronym] Award [Award Number]
Message:	Dear [PI First Name] [PI Last Name]: The [Award Program Office] ([Award Program Office Acronym]) within the Department of Energy Office of Science requests that you submit a Progress Report for the award listed below. To create and submit the Progress Report, please use the DOE Office of Science Portfolio Analysis and Management System (PAMS). *<NOTE: External Login URL>* **Task**: Submit Progress Report (Link) *<NOTE: Awardee Report Task page URL>* **Task Owner(s):** [Task Owner(s)] **Report Tracking Number:** [Progress Report Tracking Number] **Due Date:** [Task Due Date MM/DD/YYYY HH:MM PM ET] **Reporting Period:** [Reporting Period Start Date] - [Reporting Period End Date] **Award Number:** [Award Number] **Principal Investigator:** [Award PI Last Name], [Award PI First Name] **Institution:** [Award Institution Name], [City], [State Abbr.] **Title:** [Project Title] Our records indicate you already have a PAMS account. If you have trouble using PAMS, consult the "External User Guide" on the PAMS website or contact the PAMS Helpdesk at (855) 818-1846 (toll-free number) or (301) 903-9610 or sc.pams-helpdesk@science.doe.gov. This message was sent on behalf of the program manager, [Primary PM First Name] [Primary PM Last Name], who can be reached at [Primary PM's Email]. Replies to this message will not reach the intended recipient.

Figure 1. PAMS Email Notifications – Existing PI, Progress Report Task

2. Once you are logged in to PAMS, navigate to the Tasks tab > Pending Tasks – List page (*Figure 2*).

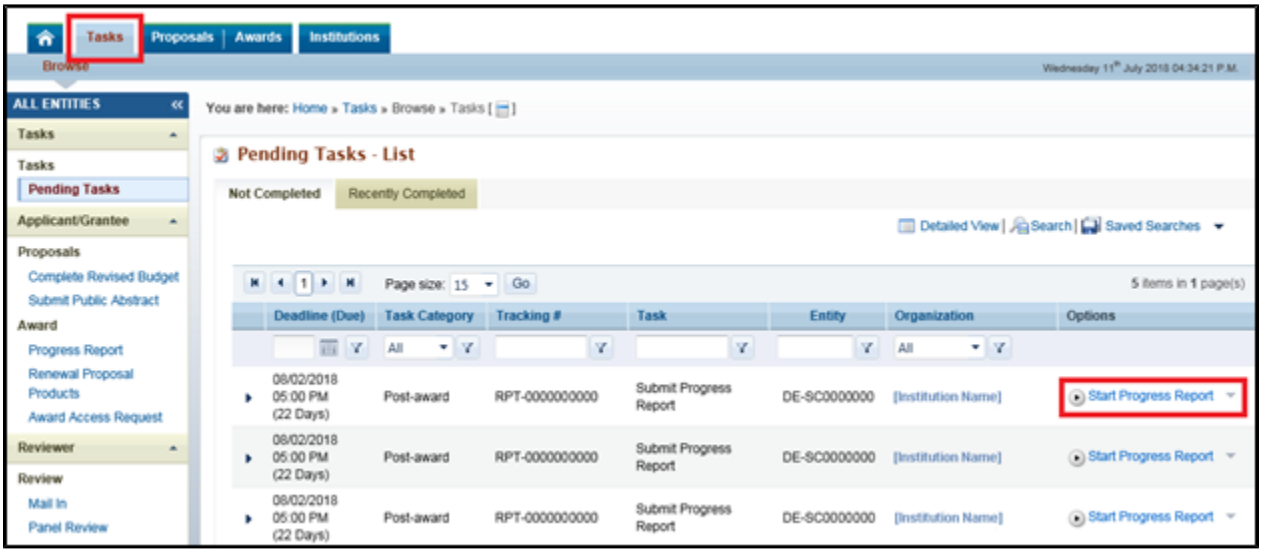

Figure 2. Tasks – Pending Tasks – List Page, Start Progress Report

3. Find the Submit Progress Report task you want to complete, and click the **Start Progress Report** link in the Options column (*Figure 2*). If necessary, use the filters in the grid or click the **Search** link on the right above the grid to find a specific Submit Progress Report task to work on.

3.1.2 No Existing Account

Use the following steps to access the Progress Report task if the PI on the award does not have an existing external PAMS account.

1. If the PI does not have an existing external PAMS account, PAMS will send an email notification to the PI indicating that the task has been created, and provide a registration link and code (*Figure 3*). Click the **I do not have a PAMS account** link.

To:	PI
CC:	
From:	**PAMS**
Subject:	DOE Request to Submit a Progress Report for [Award Program Office Acronym] Award [Award Number]
Message:	Dear [PI First Name] [PI Last Name]: The [Award Program Office] ([Award Program Office Acronym]) within the Department of Energy Office of Science requests that you submit a Progress Report for the award listed below. To create and submit the Progress Report, please use the DOE Office of Science Portfolio Analysis and Management System (PAMS). To use PAMS, click on the appropriate link below and enter the registration code that follows. Note that two links are provided, one to use if you already have a PAMS account and one to use if you do not. **Links**: I already have a PAMS account. *<NOTE: Verify Code URL, with "has account" in query string>* **or** I do not have a PAMS account. *<NOTE: Verify Code URL>* **Registration Code:** [Registration Code] **Task**: Submit Progress Report **Task Owner(s)**: [Task Owner(s)] **Report Tracking Number:** [Progress Report Tracking Number] **Due Date:** [Task Due Date MM/DD/YYYY HH:MM PM ET] **Reporting Period:** [Reporting Period Start Date] - [Reporting Period End Date] **Award Number:** [Award Number] **Principal Investigator:** [Award PI Last Name], [Award PI First Name] **Institution:** [Award Institution Name], [City], [State Abbr.] **Title:** [Award Title] If you have trouble using PAMS, consult the "External User Guide" on the PAMS website or contact the PAMS Helpdesk at (855) 818-1846 (toll-free number) or (301) 903-9610 or sc.pams-helpdesk@science.doe.gov.

Figure 3. PAMS Email Notifications – No Existing PI, Progress Report Task

2. Enter the registration code on the Verify Registration Code page, and click **Verify** in the bottom right corner of the page (*Figure 4*).

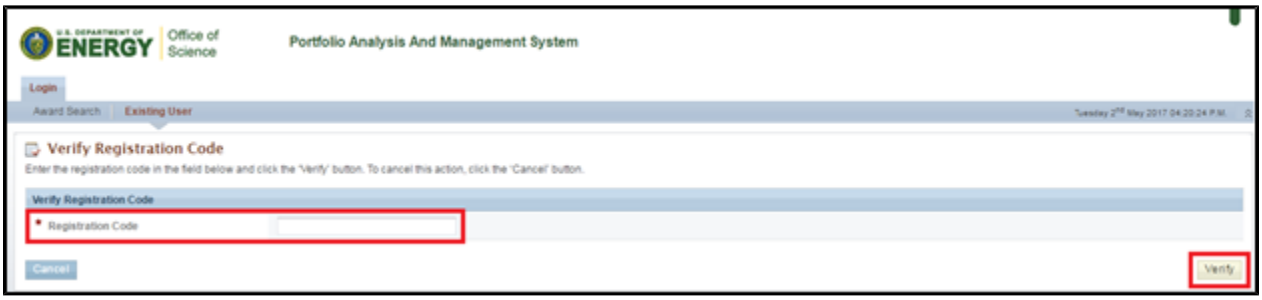

Figure 4. Verify Registration Code Page

3. Complete the account creation process. (Step-by-step instructions for account creation can be found in the External User – Create Account training module.)

4. Begin at Step 2 in section *1.1 Existing Account* to access the Progress Report task after creating the account.

3.2 Reviewing Progress Report Status

When you select a progress report on the Pending Tasks – List page, PAMS redirects you to the progress report's Progress Report – Status page. The Progress Report – Status page shows the completion status of each section of the progress report. The sections are listed in the left navigation menu and in the Progress Report Status section on the page.

Sections that are complete will display "Complete" with a green checkmark in the Status column. Sections that are not complete will display "Not Started" or "In Progress" with a green checkmark with a red slash through it in the Status column.

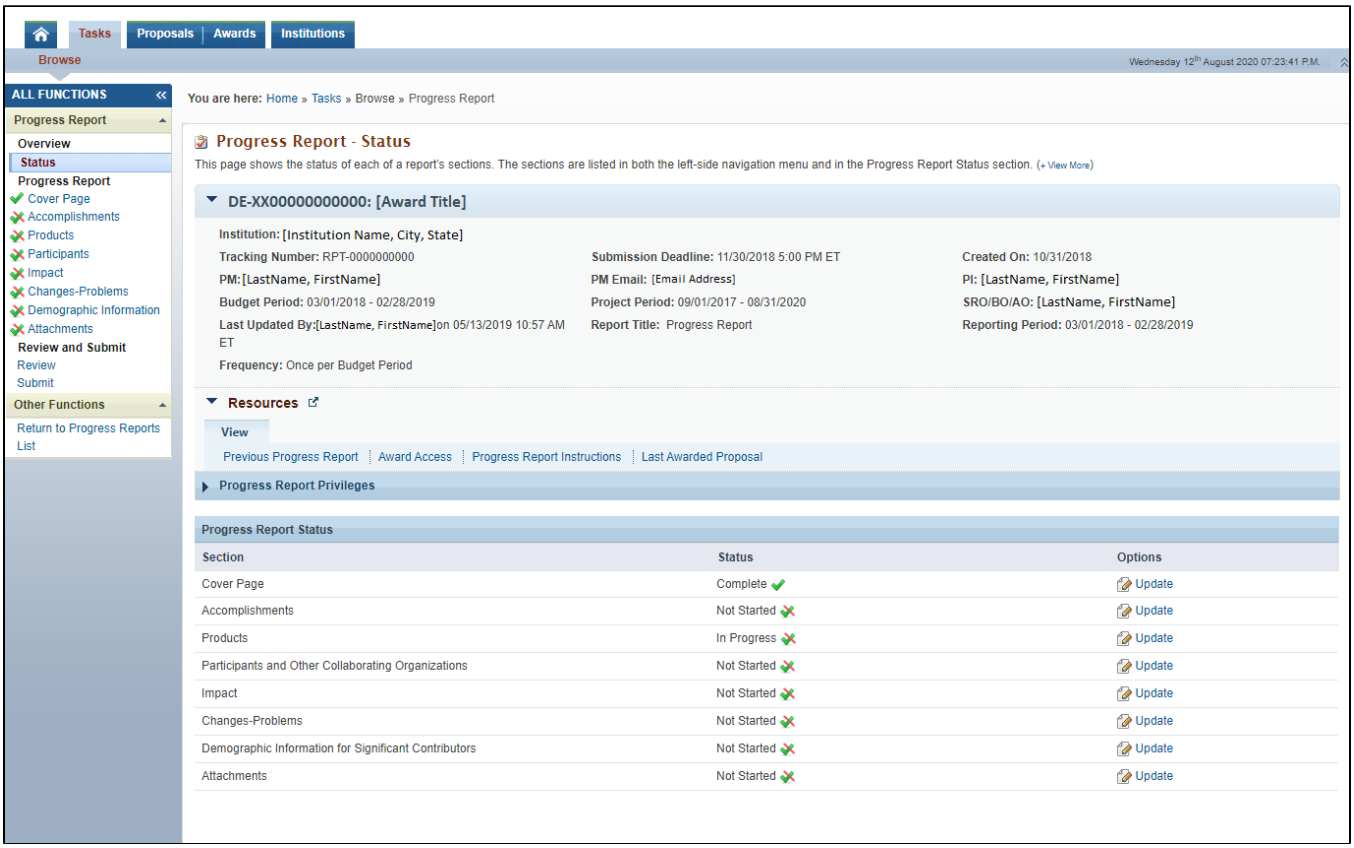

Figure 5. Progress Report – Status Page

3.3 Completing the Cover Page

The Cover Page always has a status of "Complete", because the information in this section prepopulates with information from the Award record. Use the following steps to review and edit the Cover page.

1. Navigate to the Cover Page by clicking **Cover Page** in the left navigation menu or by clicking **Update** in the Options column on the Progress Report – Status page (*Figure 5*).

2. PAMS will load the Progress Report – Cover Page. On this page, you can add, edit, or delete the Recipient Award Identification Number (*Figure 6*).

Note	The Recipient Award Identification Number is a number issued by the recipient and used for internal processing or reporting.

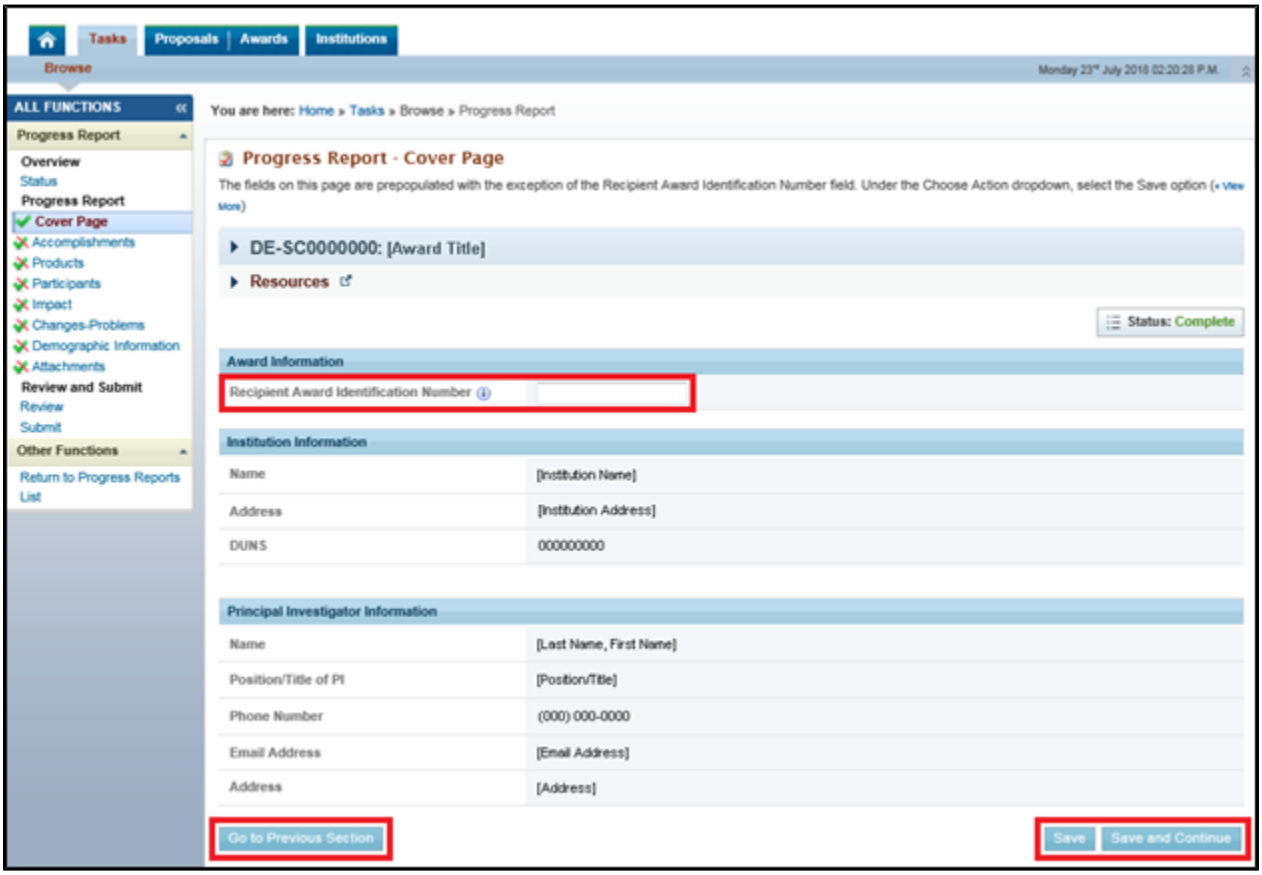

Figure 6. Progress Report – Cover Page

Note	Because the Award and PI Information prepopulate from the Award record, you cannot edit them on the Cover Page. To edit this information, you must create an Award Modification Request. (For guidance on creating an Award Modification Request, refer to How To: Create Award Modification Request.)

3. Once you have completed the Cover Page section, click **Save and Continue** in the bottom right corner of the page (*Figure 6*).

Note	You can save your work without leaving the page at any time by clicking the **Save** button in the bottom right corner of the page, or leave the page without saving your progress by clicking the **Go to Previous Section** button in the bottom left corner.

4. PAMS will redirect you to the next section and display a Success message confirming that the Cover Page was saved successfully (*Figure 7*).

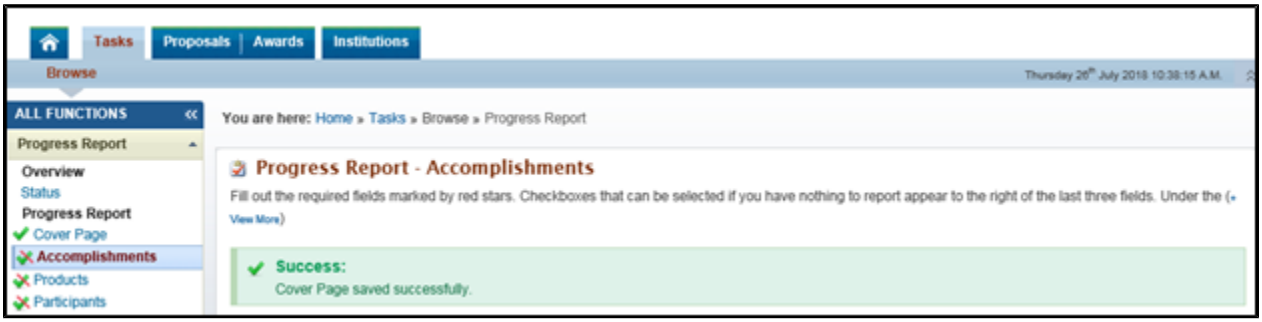

Figure 7. Cover Page Success Message

3.4 Completing the Accomplishments Section

The Accomplishments section of the progress report records the project's performance over the duration of the award. This performance is tracked with a list of five questions pertaining to project goals, accomplishments, training and development opportunities, dissemination of results, and goals and intentions for the next reporting period. Use the following steps to complete the Accomplishments section of the progress report.

1. Navigate to the Accomplishments section by clicking **Accomplishments** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Save and Continue** on the Cover Page (*Figure 6*).

2. PAMS will load the Progress Report – Accomplishments page (*Figure 8*). Fill in each textbox as appropriate. If applicable, you can select the "Nothing to Report" or "No Change" radio buttons and leave the accompanying textbox empty.

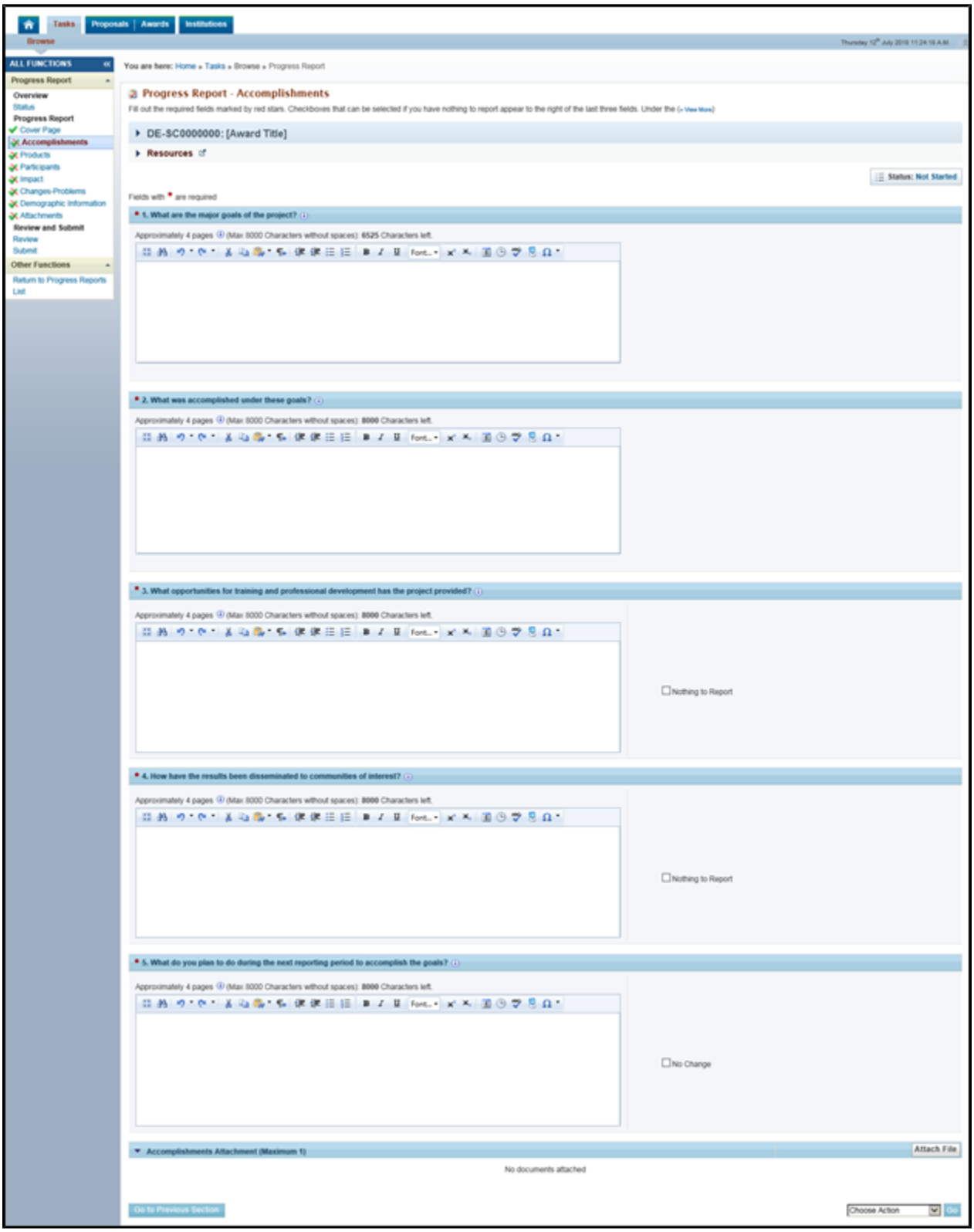

Figure 8. Progress Report – Accomplishments

Note	• You can attach one document in the Accomplishments Attachment section at the bottom of the page by clicking the **Attach File** button on the far right of the section header, browsing, and clicking **Upload**. • You can also include a description of 500 characters or less in the Accomplishments Attachment Description box. To edit the description or delete the attachment, click the **Actions** dropdown and select the appropriate action.

3. Once you have completed the required fields, select **Save and Continue** from the **Choose Action** dropdown and click **Go** (*Figure 9*).

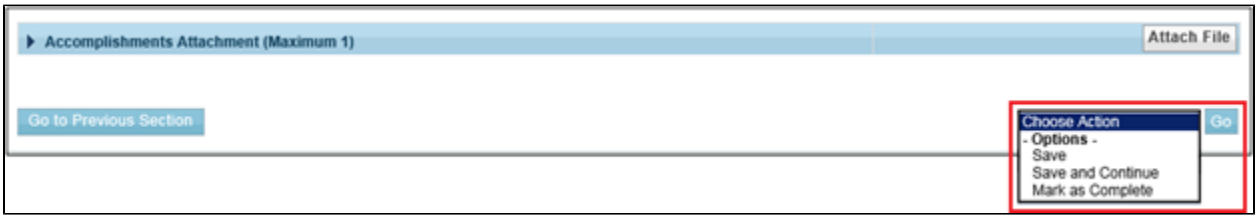

Figure 9. Progress Report – Accomplishments – Choose Action

For any page with a **Choose Action** dropdown:

- Select **Save** from the **Choose Action** dropdown to save your progress at any time without leaving the page.
- Select **Save and Continue** from the **Choose Action** dropdown to save your work and continue on to the next section.
- Select **Mark as Complete** from the **Choose Action** dropdown to mark the section as complete and continue on to the next section. All sections must be marked as complete before you can submit the progress report.
- Click **Go to Previous Section** in the bottom left corner of the page to return to the previous section without saving your progress.

4. PAMS will load a Success message confirming that the Accomplishments section has been marked as complete successfully (*Figure 10*).

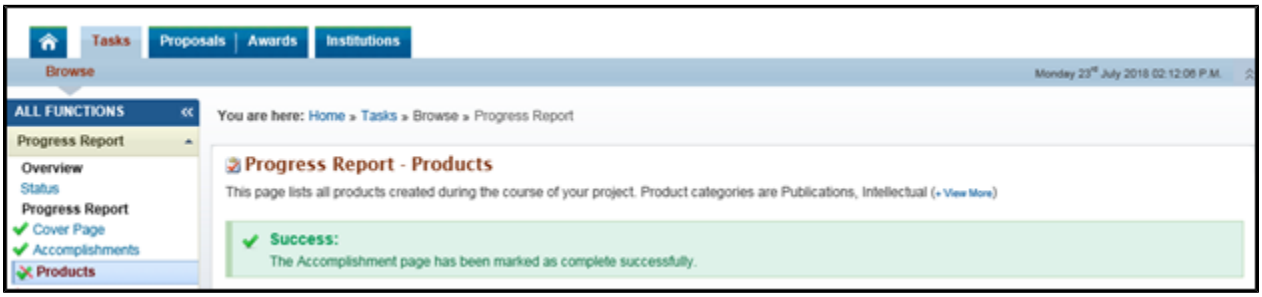

Figure 10. Progress Report – Accomplishments Success Message

3.5 Completing the Products Section

The Products section of the progress report inventories all products created during the course of the project. There are four Product categories: Publications, Intellectual Property, Technologies or Techniques, and Other Products. Use the following steps to complete the Products section of the progress report.

1. Navigate to the products section by clicking **Products** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or selecting **Save and Continue** from the dropdown menu on the Progress Report – Accomplishments page (*Figure 9*).

2. PAMS will load the Progress Report – Products page. Refer to the following sections for steps on how to add each applicable product type.

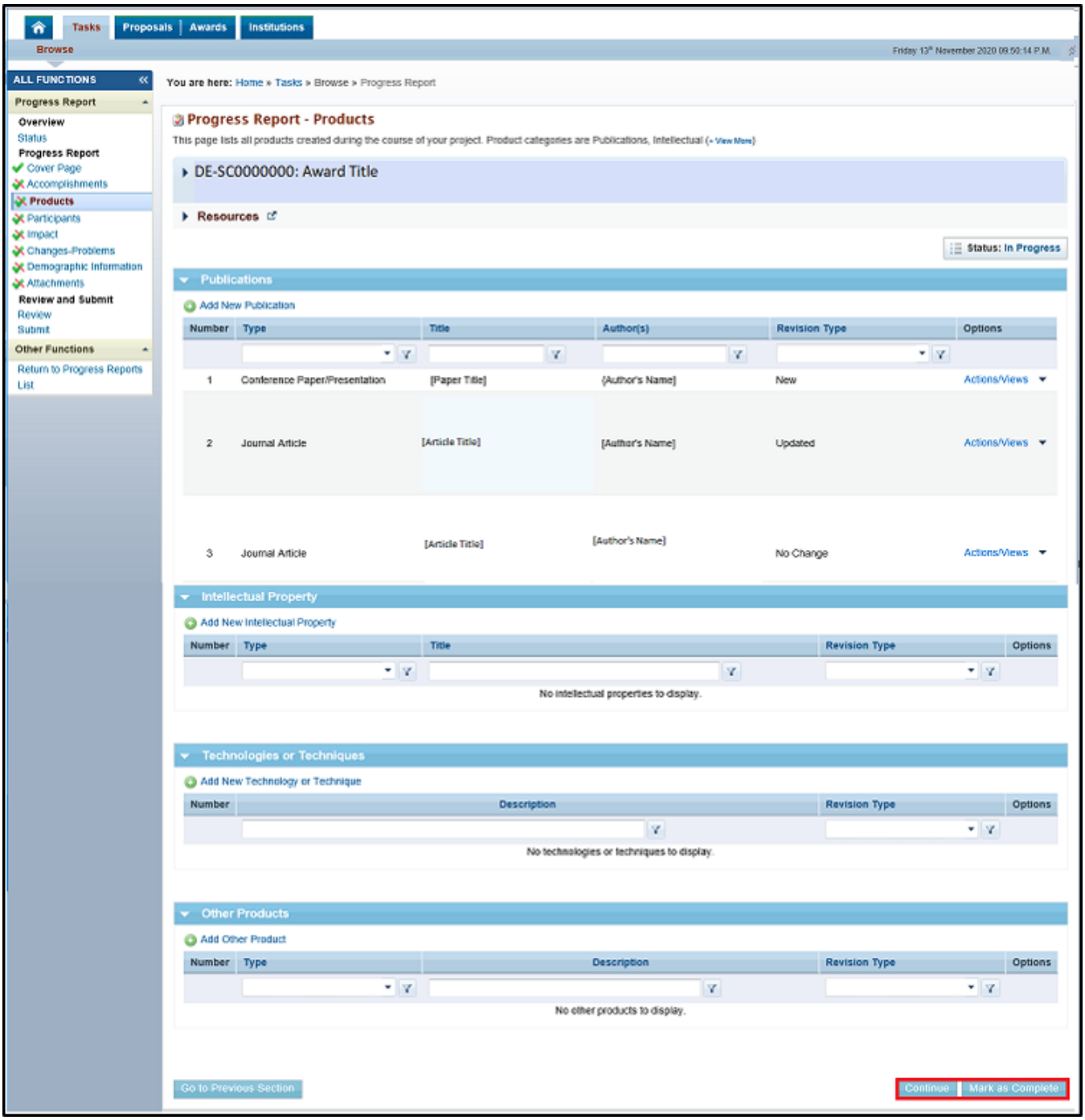

Figure 11. Progress Report – Products

Note	Any products added to previous progress reports for this award or to the Products – List page between reports will display on this page. You do not need to add them again. For guidance on editing existing products, refer to section *3.5.5 Editing Existing Products*. The Revision Type Column provides the status of each Product ("New" denotes a newly added Product, "Updated" denotes an existing Product that has been updated, and "No Change" denotes an existing Product with no changes in the Progress Report).

3.5.1 Adding a New Publication

There are seven types of Publications: Journal Article, Book, Book Chapter, Thesis/Dissertation, Conference Paper/Presentation, Website, and Other Publication. Use the following steps to add a Publication to your progress report.

1. Click the **Add New Publication** link under the Publications header on the Progress Report – Products page (*Figure 11*).

2. PAMS will load the Progress Report – Add New Publication page. Select a Publication type from the dropdown, and click **Populate Form** (*Figure 12*). PAMS will load a Publication type-specific form.

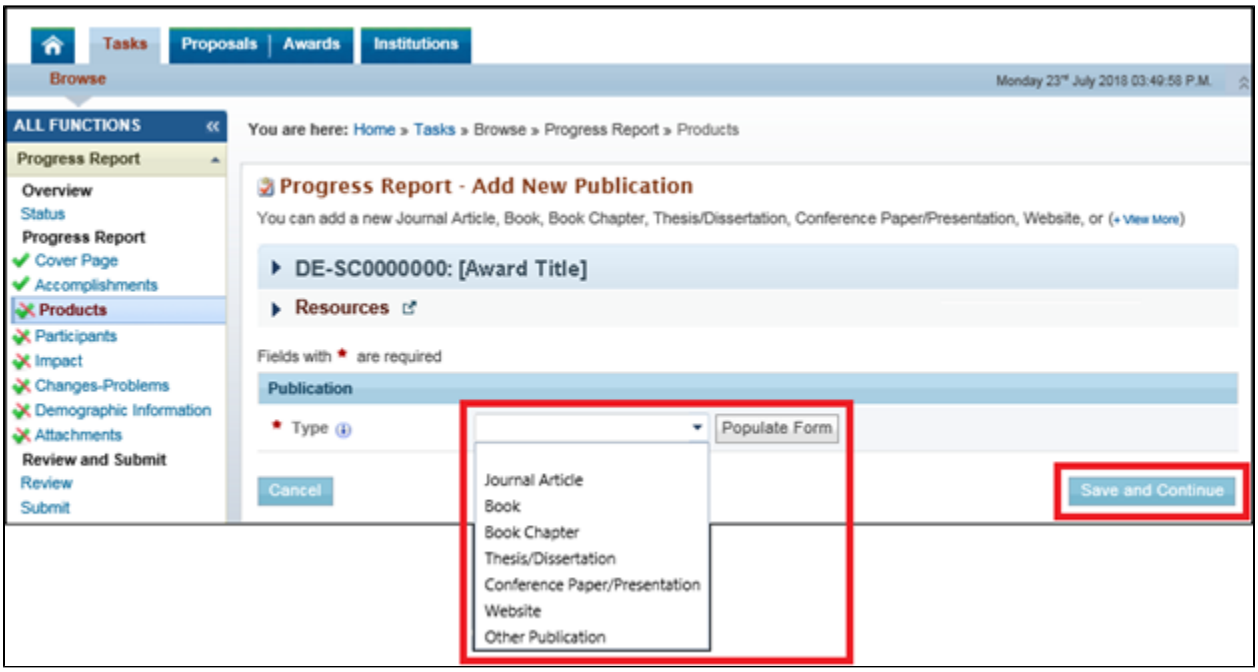

Figure 12. Progress Report – Add New Publication – Type

Note	Click **Save and Continue** in the bottom right corner of the page after adding each item to save the item to the Publications section, or click **Cancel** in the bottom left corner of the page to cancel the item and return to the Progress Report – Products page.

3.5.1.1 Adding a New Publication – Journal Article

Refer to the table below to complete the required fields to add a Journal Article to your progress report.

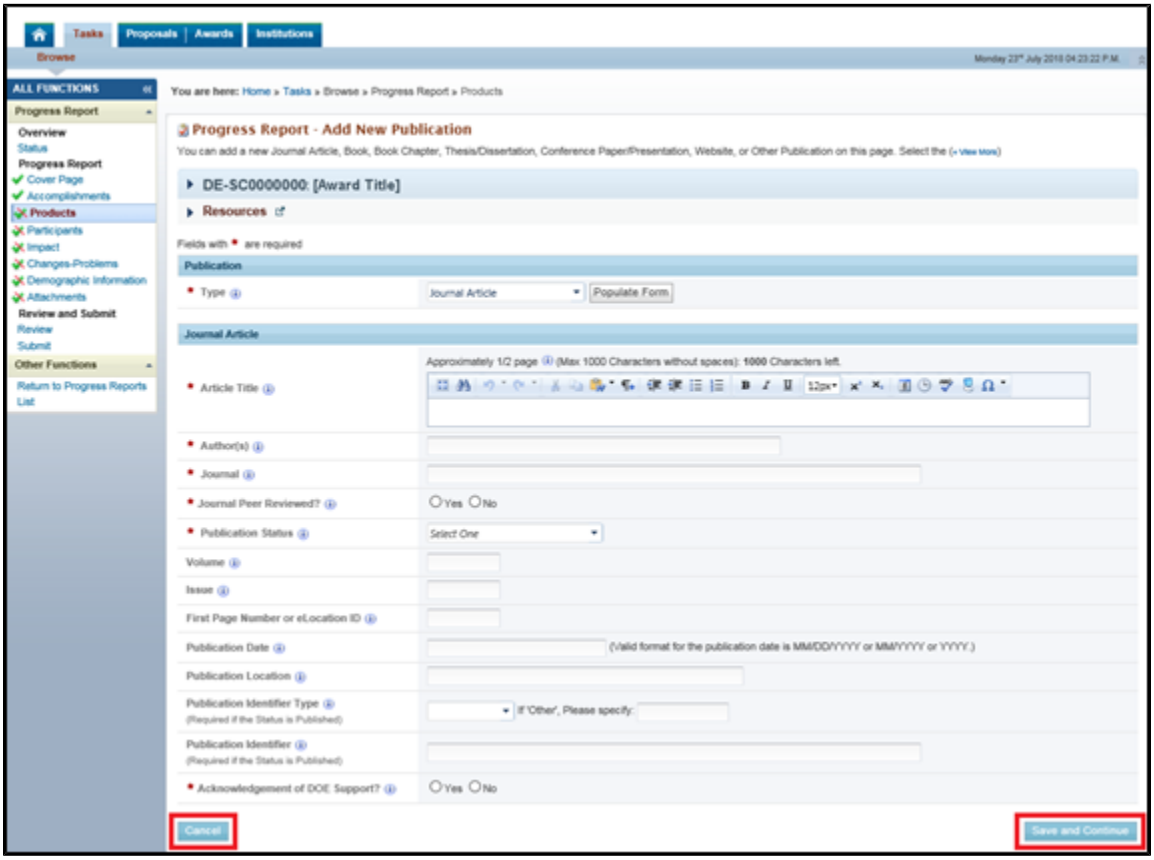

Figure 13. Progress Report – Add New Publication – Journal Article

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Article Title	Enter the title of the article.
Author(s)	Enter the name(s) of the author(s) of the article.
Journal	Enter the name of the journal in which the article is published or to be published.
Journal Peer Reviewed?	Select the “Yes” or “No” radio button to indicate whether the article was peer reviewed.
Publication Status	Click the dropdown and select one of the following to indicate the status of the publication: **Published**, **Awaiting Publication**, **Accepted**, **Under Review**, **Submitted**, or **Other**. If **Other**, specify in the box to the right of the dropdown.
Acknowledgement of DOE Support?	Select the “Yes” or “No” radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.1.2 Adding a New Publication – Book

Refer to the table below to complete the required fields to add a Book to your progress report.

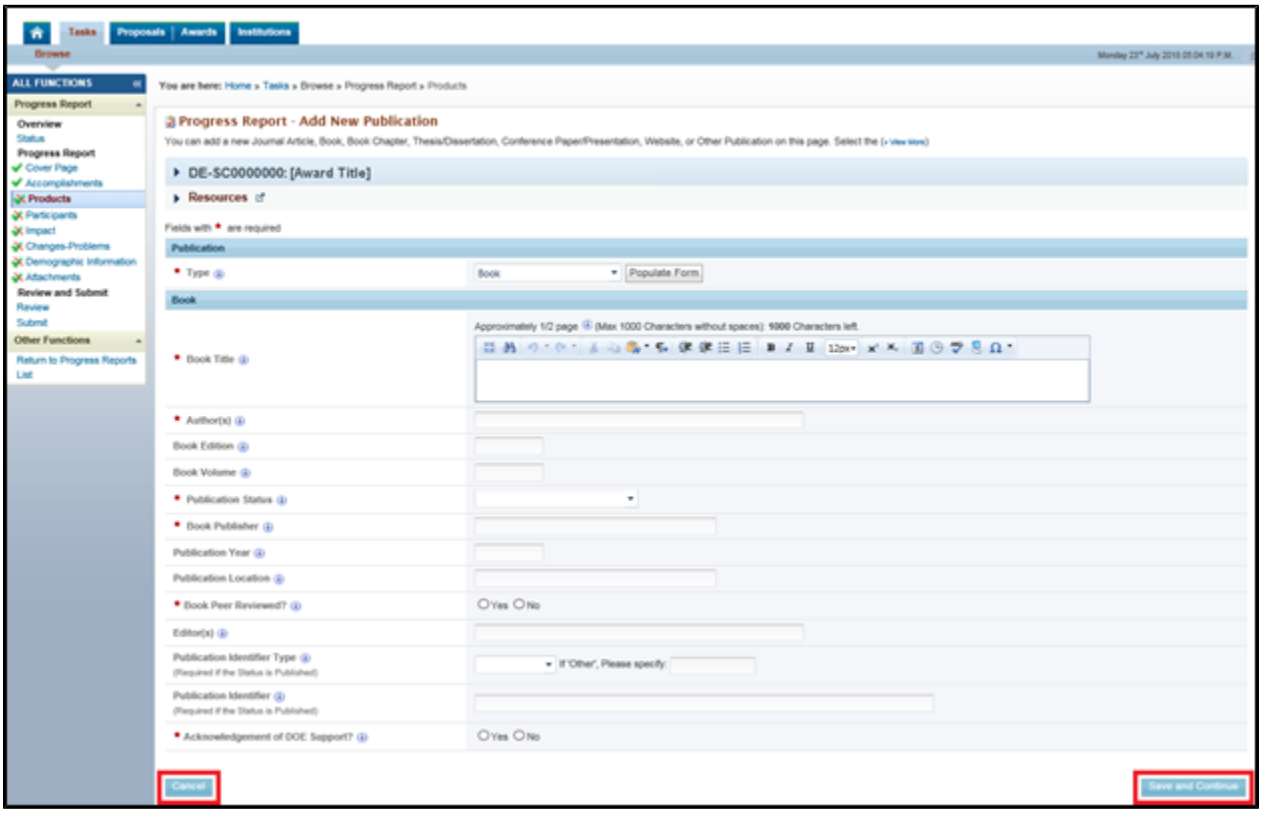

Figure 14. Progress Report – Add New Publication – Book

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Book Title	Enter the title of the book.
Author(s)	Enter the name(s) of the author(s) of the book.
Publication Status	Click the dropdown and select one of the following to indicate the status of the publication: **Published**, **Awaiting Publication**, **Accepted**, **Under Review**, **Submitted**, or **Other**. If **Other**, specify in the box to the right of the dropdown.

Book Publisher	Enter the name of the book's publisher.
Book Peer Reviewed?	Select the "Yes" or "No" radio button to indicate whether the book was peer reviewed.
Acknowledgement of DOE Support?	Select the "Yes" or "No" radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.1.3 Adding a New Publication – Book Chapter

Refer to the table below to complete the required fields to add a Book Chapter to your progress report.

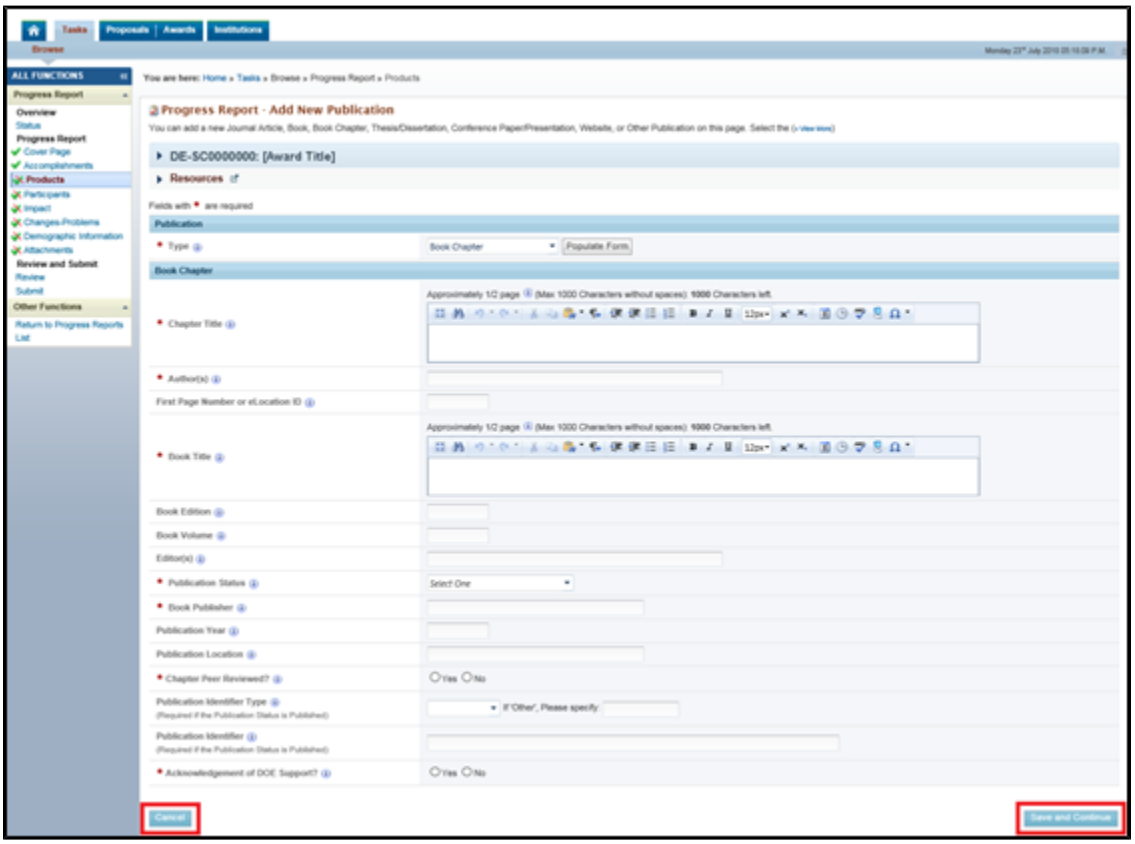

Figure 15. Progress Report – Add New Publication – Book Chapter

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Chapter Title	Enter the title of the book chapter.
Author(s)	Enter the name(s) of the author(s) of the book chapter.
Book Title	Enter the title of the book.
Publication Status	Click the dropdown and select one of the following to indicate the status of the publication: **Published**, **Awaiting Publication**, **Accepted**, **Under Review**, **Submitted**, or **Other**. If **Other**, specify in the box to the right of the dropdown.
Book Publisher	Enter the name of the book's publisher.
Chapter Peer Reviewed?	Select the "Yes" or "No" radio button to indicate whether the chapter was peer reviewed.
Acknowledgement of DOE Support?	Select the "Yes" or "No" radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.1.4 Adding a New Publication – Thesis/Dissertation

Refer to the table below to complete the required fields to add a Thesis/Dissertation to your progress report.

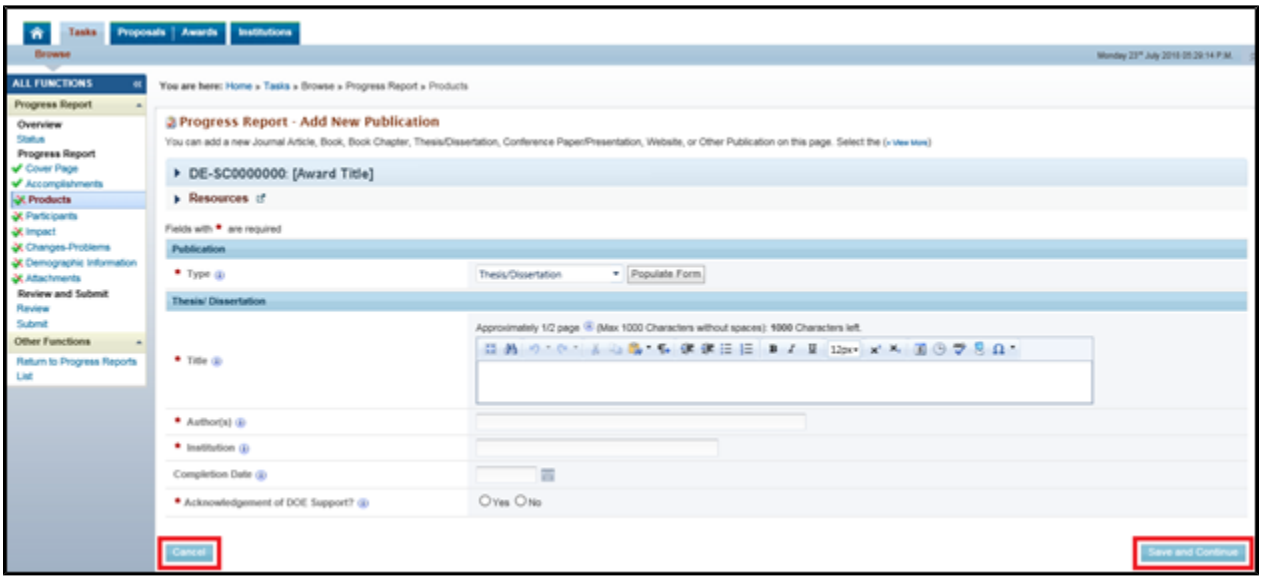

Figure 16. Progress Report – Add New Publication – Thesis/Dissertation

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Title	Enter the title of the thesis/dissertation.
Author(s)	Enter the name(s) of the author(s) of the thesis/dissertation.
Institution	Enter the name of the institution to which the thesis/dissertation was presented.
Acknowledgement of DOE Support?	Select the “Yes” or “No” radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.1.5 Adding a New Publication – Conference Paper/Presentation

Refer to the table below to complete the required fields to add a Conference Paper/Presentation to your progress report.

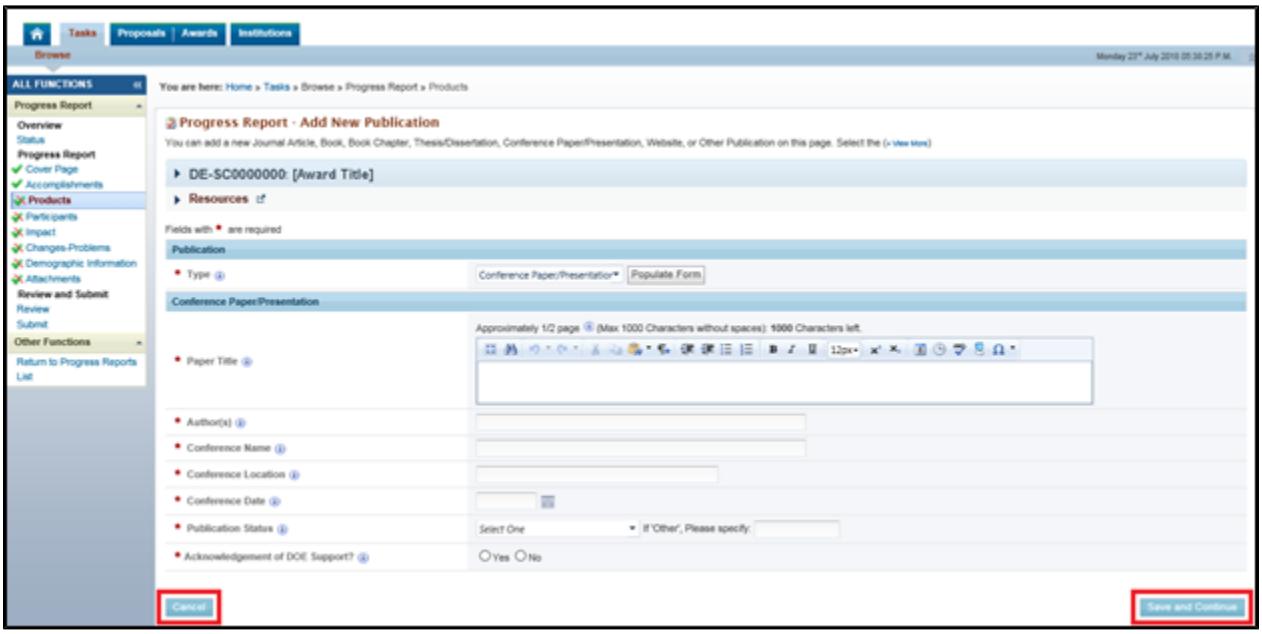

Figure 17. Progress Report – Add New Publication – Conference Paper/Presentation

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Paper Title	Enter the title of the conference paper/presentation.
Author(s)	Enter the name(s) of the author(s) of the conference paper/presentation.
Conference Name	Enter the name of the conference for which the conference paper/presentation was written.
Conference Location	Enter the city and country in which the conference was held.
Conference Date	Enter the date on which the conference began.
Publication Status	Click the dropdown and select one of the following to indicate the status of the publication: **Published**, **Awaiting Publication**, **Accepted**, **Under Review**, **Submitted**, or **Other**. If **Other**, specify in the box to the right of the dropdown.
Acknowledgement of DOE Support?	Select the “Yes” or “No” radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.1.6 Adding a New Publication – Website

Refer to the table below to complete the required fields to add a website to your progress report.

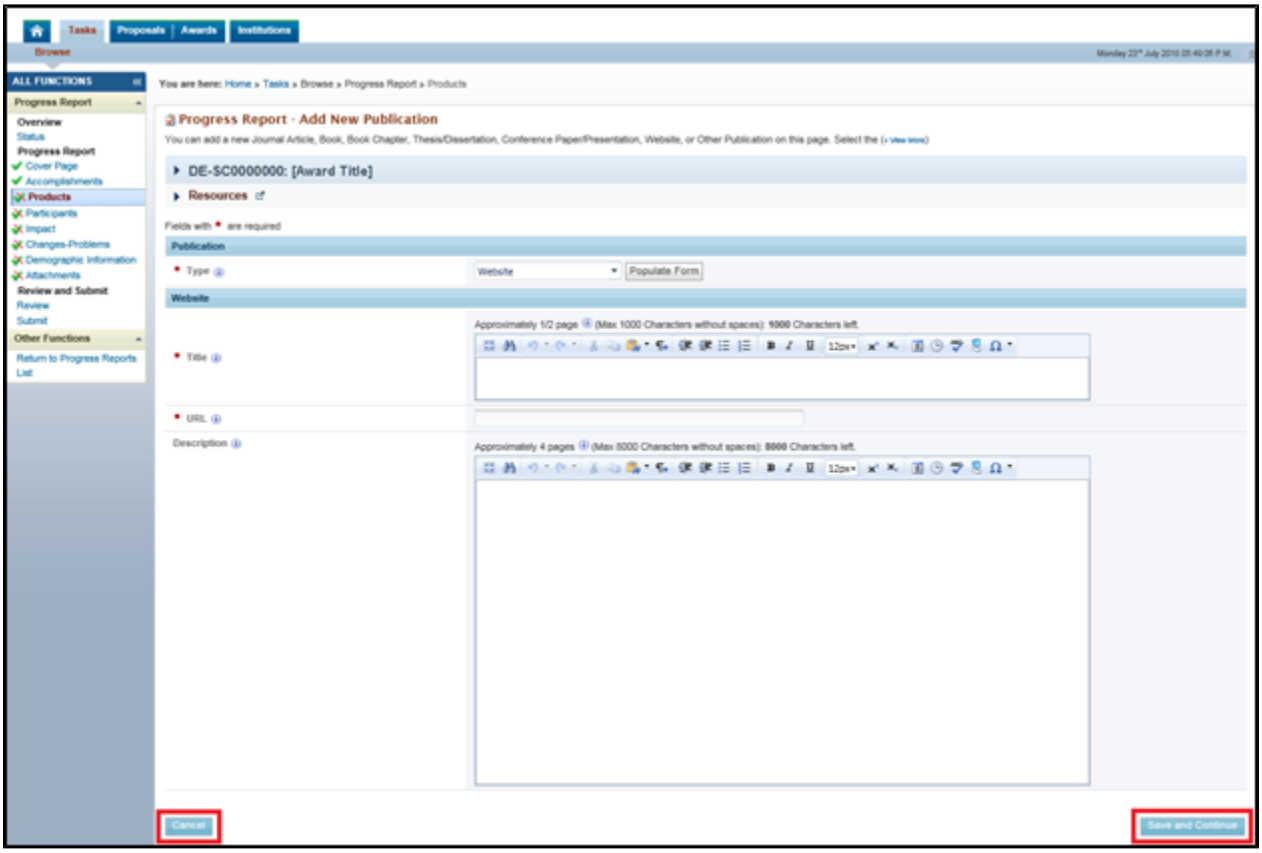

Figure 18. Progress Report – Add New Publication – Website

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Title	Enter the title of the website.
URL	Enter the web address.

3.5.1.7 Adding a New Publication – Other Publication

Refer to the table below to complete the required fields to add an Other Publication to your progress report.

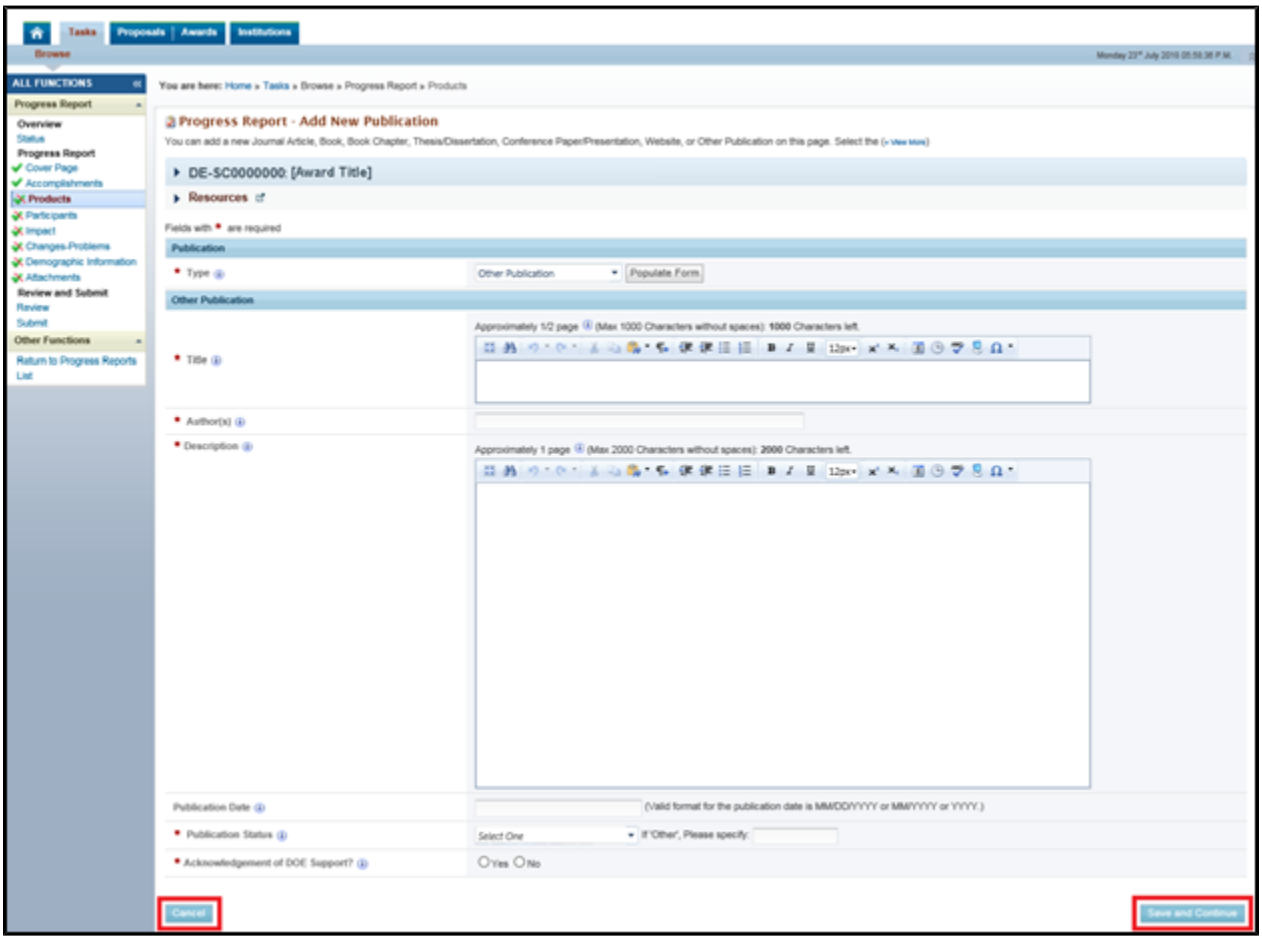

Figure 19. Progress Report – Add New Publication – Other Publication

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Title	Enter the name of the publication.
Author(s)	Enter the name(s) of the author(s) of the publication.
Description	Enter a description of the publication.
Publication Status	Click the dropdown and select one of the following to indicate the status of the publication: **Published**, **Awaiting Publication**, **Accepted**, **Under Review**, **Submitted**, or **Other**. If **Other**, specify in the box to the right of the dropdown.
Acknowledgement of DOE Support?	Select the “Yes” or “No” radio button to indicate whether an acknowledgement of DOE Support was provided to the publisher.

3.5.2 Adding a New Intellectual Property

There are three types of Intellectual Property: Patent, Invention, and License. Use the following steps to add an Intellectual Property to your progress report.

1. Click the **Add New Intellectual Property** link under the Intellectual Property header on the Progress Report – Products page (*Figure 11*).

2. PAMS will load the Progress Report – Add New Intellectual Property page. Select an Intellectual Property type from the dropdown, and click **Populate Form** (*Figure 20*). PAMS will load an Intellectual Property type-specific form.

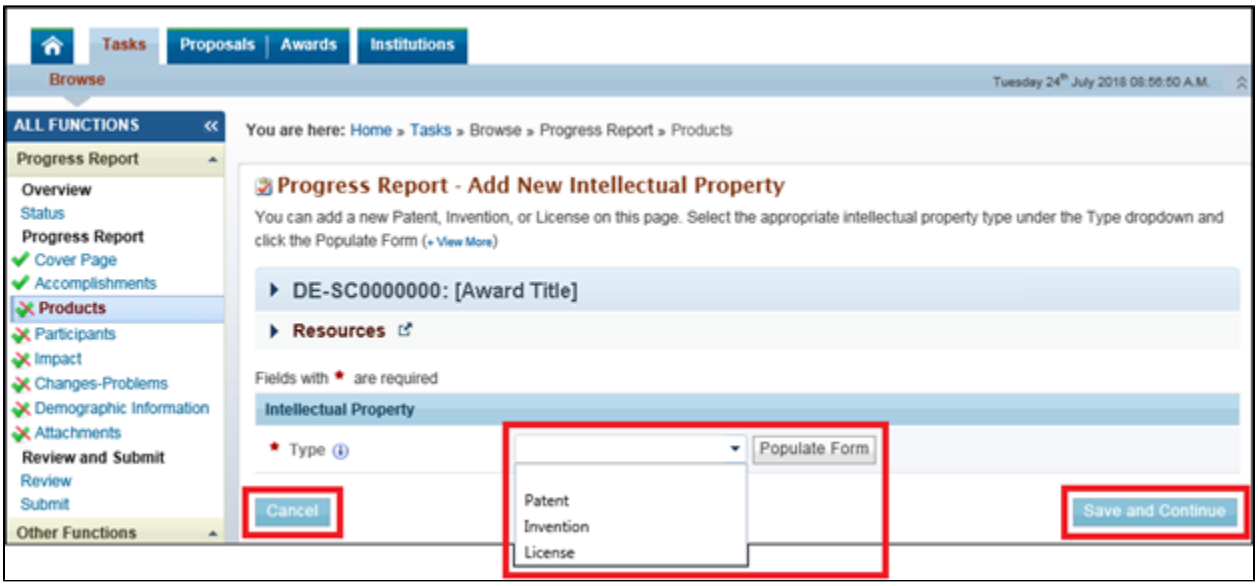

Figure 20. Progress Report – Add New Intellectual Property

Note	Click **Save and Continue** in the bottom right corner of the page after adding each item to save the item to the Publications section, or click **Cancel** in the bottom left corner of the page to cancel the item and return to the Progress Report – Products page.

3.5.21 Adding a New Intellectual Property – Patent

Refer to the table below to complete the required fields to add a Patent to your progress report.

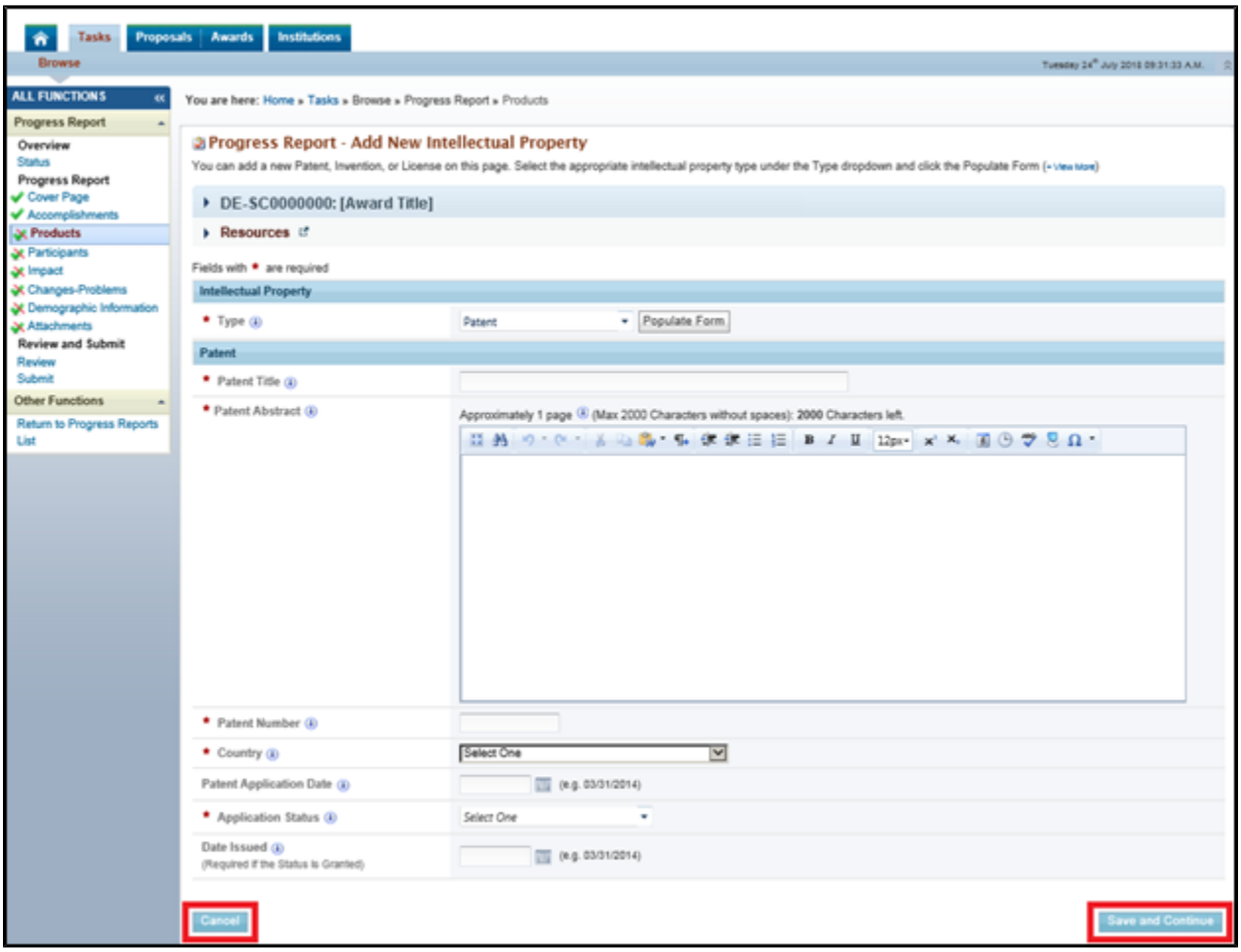

Figure 21. Progress Report – Add New Intellectual Property – Patent

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Patent Title	Enter the name of the patent.
Patent Abstract	Enter an abstract describing the patent.
Patent Number	Enter the number of the patent.
Country	Use the dropdown to select the country in which the patent resides.
Applicable Status	Use the dropdown to select one of the following to describe the status of the patent application: **Submitted**, **Pending**, or **Granted**.

3.5.2.2 Adding a New Intellectual Property – Invention

Refer to the table below to complete the required fields to add an Invention to your progress report.

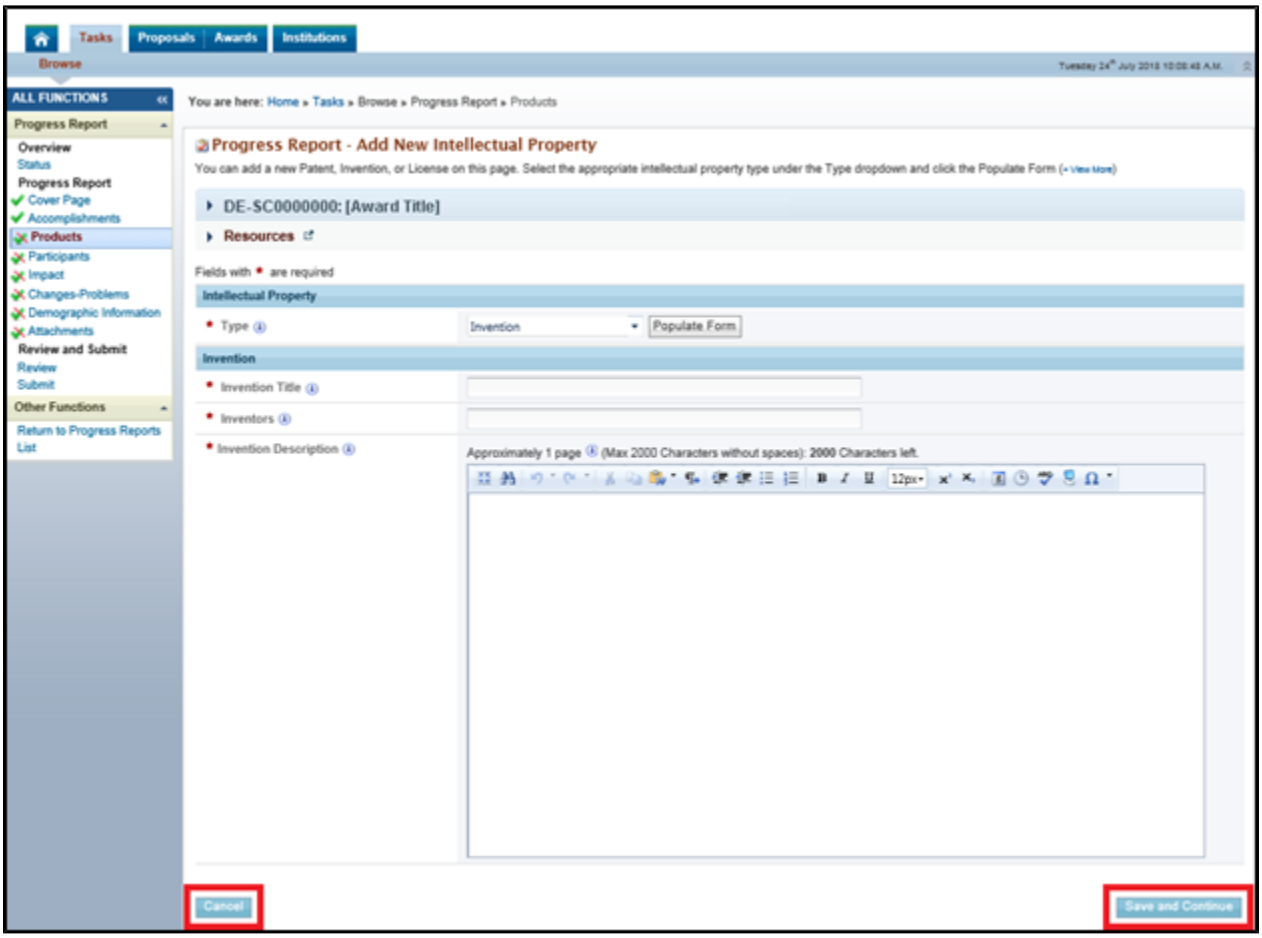

Figure 22. Progress Report – Add New Intellectual Property – Invention

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
Invention Title	Enter the name of the invention.
Inventors	Enter the name(s) of the inventor(s).
Invention Description	Enter a description of the invention.

3.5.2.3 Adding a New Intellectual Property – License

Refer to the table below to complete the required fields to add a License to your progress report.

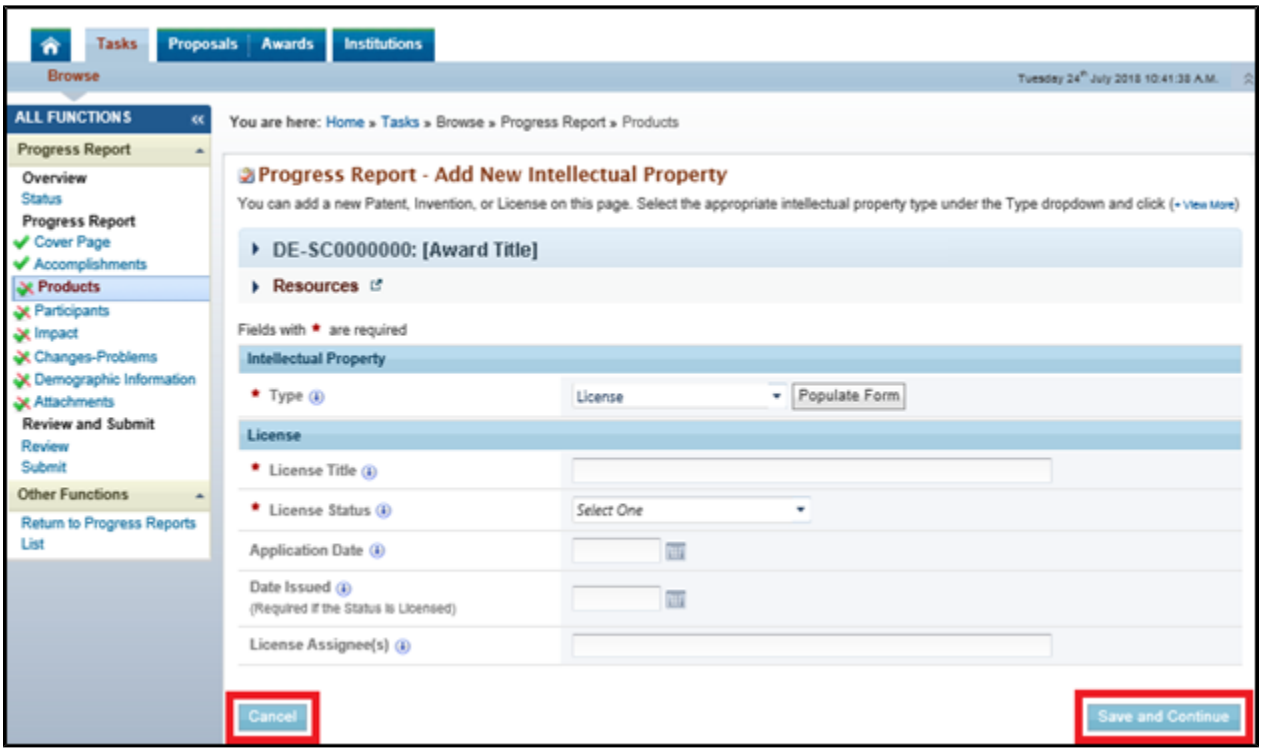

Figure 23. Progress Report – Add new Intellectual Property – License

Required Fields

Element	Description
Type	This field contains the Publication type you selected and determines the Publication form you are filling out.
License Title	Enter the name of the license.
License Status	Use the dropdown to select one of the following to describe the status of the license: **None**, **Pending**, or **Licensed**.

3.5.3 Adding a New Technology or Technique

There is only one type of Technology or Technique. Use the following steps to add a Technology or Technique to your progress report.

1. Click the **Add New Technology or Technique** link under the Technologies or Techniques header on the Progress Report – Products page (*Figure 11*).

2. PAMS will load the Progress Report – Add New Technology or Technique page (*Figure 24*). Refer to the table below to complete the required fields to add a technology or technique to your progress report.

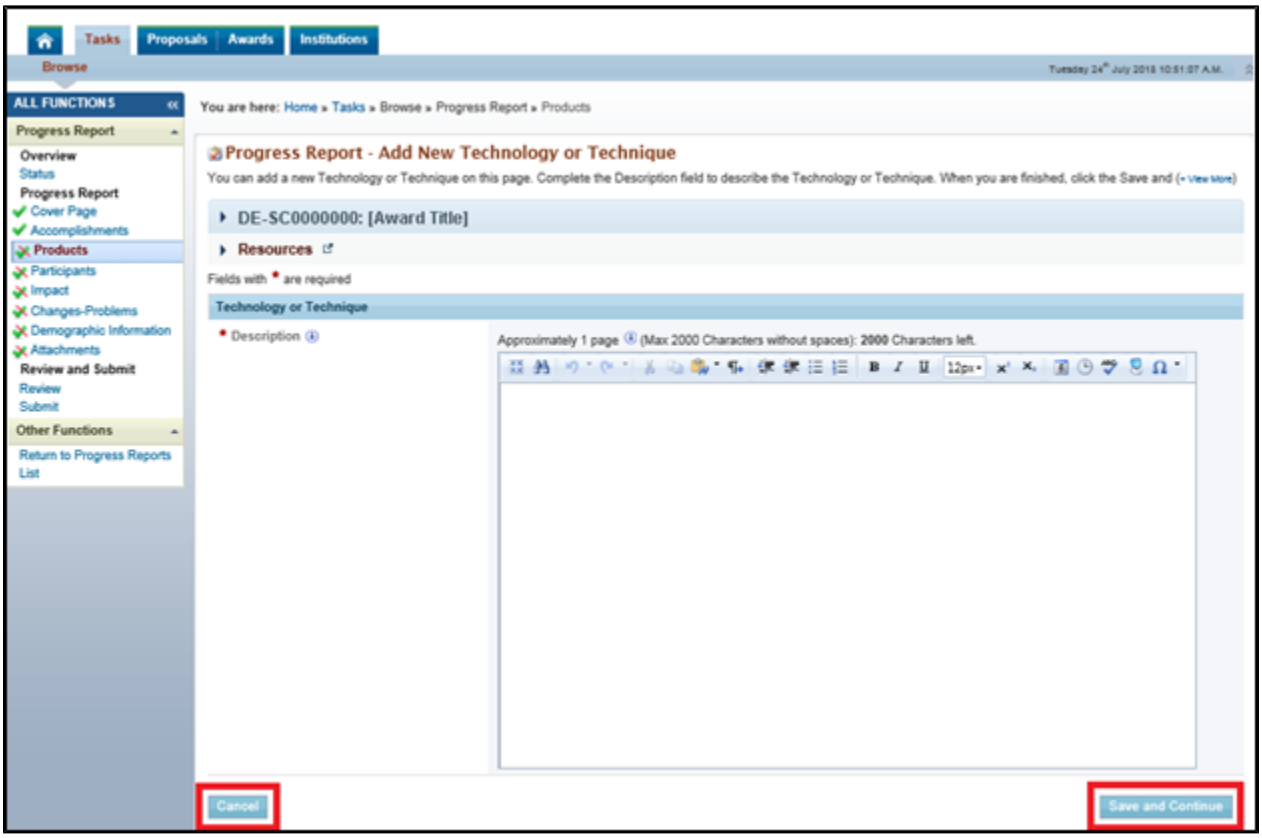

Figure 24. Progress Report – Add New Technology or Technique

Required Fields

Element	Description
Description	Enter the name and a description of the technology or technique produced.

3.5.4 Adding an Other Product

All products that do not fall into any of the previous categories are recorded under Other Product. These products include: Audio or Video, Databases, Data and Research Material, Education Aids or Curricula, Evaluation Instruments, Instruments or Equipment, Models, Physical Collections, Protocols, Software or NetWare, Survey Instruments, and Other. Use the following steps to add an Other Product to your progress report.

1. Click the **Add Other Product** link under the Other Products header on the Progress Report – Products page (*Figure 11*).

2. PAMS will load the Progress Report – Add Other Product page (*Figure 25*). Refer to the table below to complete the required fields to add an Other Product to your progress report.

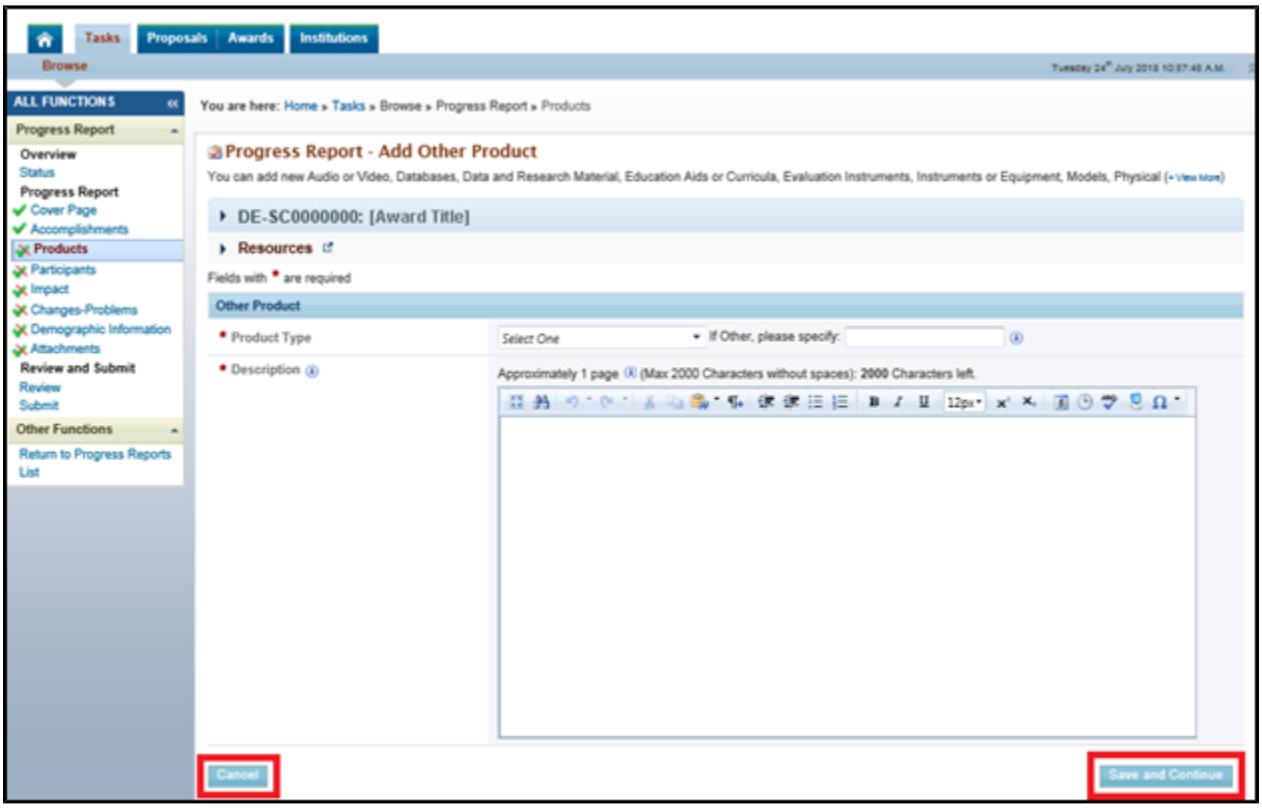

Figure 25. Progress Report – Add Other Product

Required Fields

Element	Description
Product Type	Use the dropdown to select one of the following to describe the product type: **Audio or Video**, **Databases**, **Data and Research Material**, **Education Aids or Curricula**, **Evaluation Instruments**, **Instruments or Equipment**, **Models**, **Physical Collections**, **Protocols**, **Software or NetWare**, **Survey Instrument**, or **Other**. If **Other**, specify in the box to the right of the dropdown.
Description	Enter a description of the product and how it is being shared.

3.5.5 Editing Existing Products

Use the following steps to make any changes to a product in the Products section.

3.5.5.1 Updating an Existing Product

1. Navigate to the Progress Report – Products page by clicking **Products** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or selecting **Save and Continue** from the dropdown menu on the Progress Report – Accomplishments page (*Figure 9*).

2. Click **Update** in the **Actions/Views** dropdown for the product you would like to update. PAMS will redirect you to the product's page (refer to the Product pages above).

3. Click **Save and Continue** to save any changes when you are finished, or click **Cancel** to cancel any changes.

3.5.5.2 Deleting an Existing Product

1. Navigate to the Progress Report – Products page by clicking **Products** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or selecting **Save and Continue** from the dropdown menu on the Progress Report – Accomplishments page (*Figure 9*).

2. Click **Delete** in the **Action/Views** dropdown for the product you would like to delete (*Figure 11*).

3. PAMS will display a Confirmation message asking if you are sure you want to delete the product (*Figure 26*). Read the message carefully. If you are sure you want to delete the product, click **Confirm**. If you do not want to delete the product, click **Cancel**.

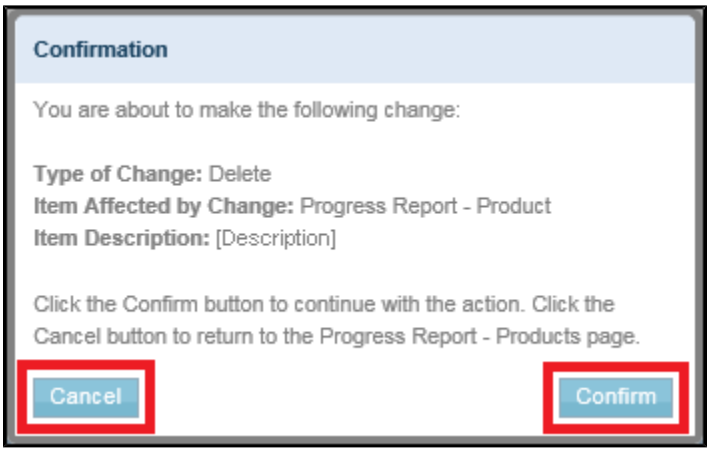

Figure 26. Progress Report – Products – Delete Product Confirmation Message

4. PAMS will load a Success message confirming that the product was deleted successfully (*Figure 27*).

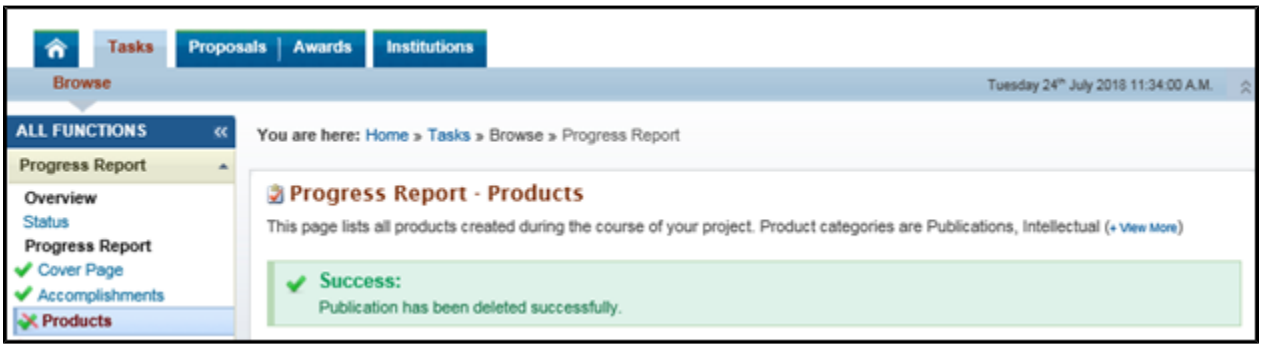

Figure 27. Progress Report – Products – Delete Product Success Message

3.5.6 Marking the Products Section as Complete

Use the following steps to mark the Products section of the progress report as complete.

1. Once you have completed the Products section, click **Mark as Complete** in the bottom right corner of the page (*Figure 11*).

Note	You can view a product at any time before submitting the progress report by clicking the **Actions/Views** dropdown on the Progress Report – Products page and selecting **View**. The product will load in a popup window on top of the main window. Click the **Close Window** button in the bottom right corner when you are finished.

2. PAMS will redirect you to the next section and display a Success message confirming that the Products page was marked as complete successfully (*Figure 28*).

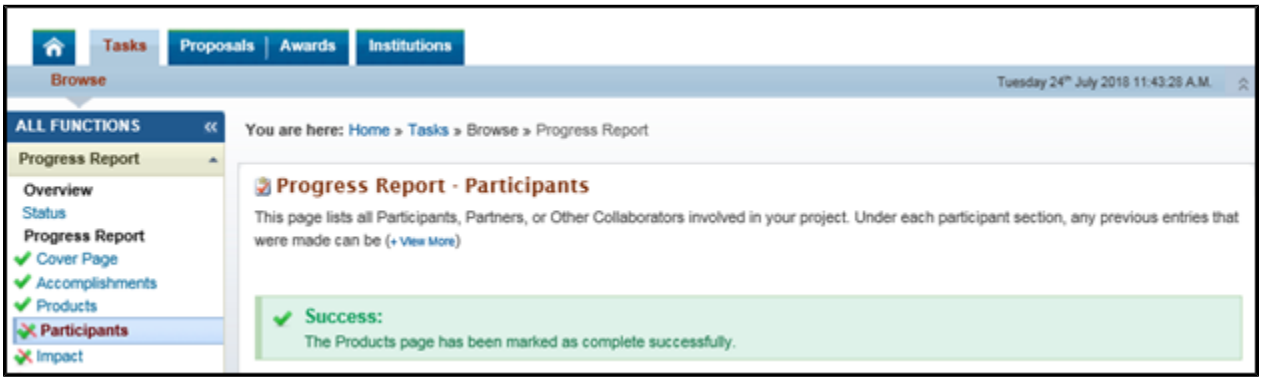

Figure 28. Progress Report – Products – Success Message

3.6 Completing the Participants Section

The Participants section of the progress report lists all individuals and entities involved with the project. There are three Participants categories: Participants, Partners, and Other Collaborators. Use the following steps to complete the Participants section of the progress report.

1. Navigate to the Participants section by clicking **Participants** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Save and Continue** on the Progress Report – Products page (*Figure 11*).

2. PAMS will load the Progress Report – Participants page (*Figure 29*). Refer to the following sections for steps on how to add each applicable Participant type.

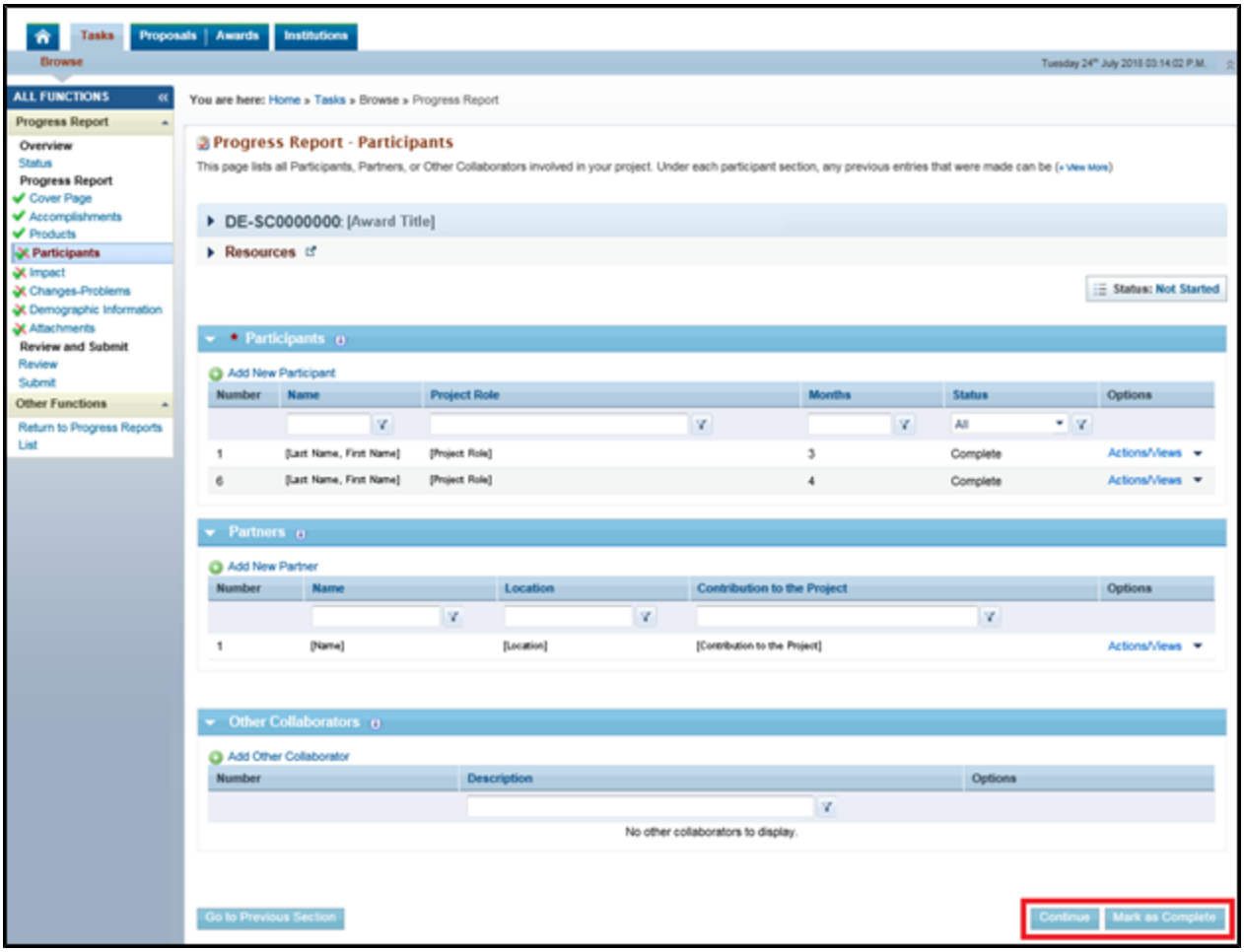

Figure 29. Progress Report – Participants

Note	Any participants added to previous progress reports for this award will display on this page. You do not need to add them again. For guidance on editing existing participants, refer to section *3.6.4 Editing Existing Participants*.

3.6.1 Adding a New Participant

Participants are any people who are principal investigator(s), project director(s), or have worked at least one month (approximately 160 hours) per year on this project during the reporting period, regardless of the source of their compensation. Use the following steps to add a new participant to the progress report.

1. Click the **Add New Participant** link under the Participants header on the Progress Report – Participants page (*Figure 29*).

2. PAMS will load the Progress Report – Add New Participant – List page (*Figure 30*). Use the Last Name like, First Name Like, and Email like fields to search for the registered PAMS user(s) you would like to add to the progress report. Click **Search** to see the list of results.

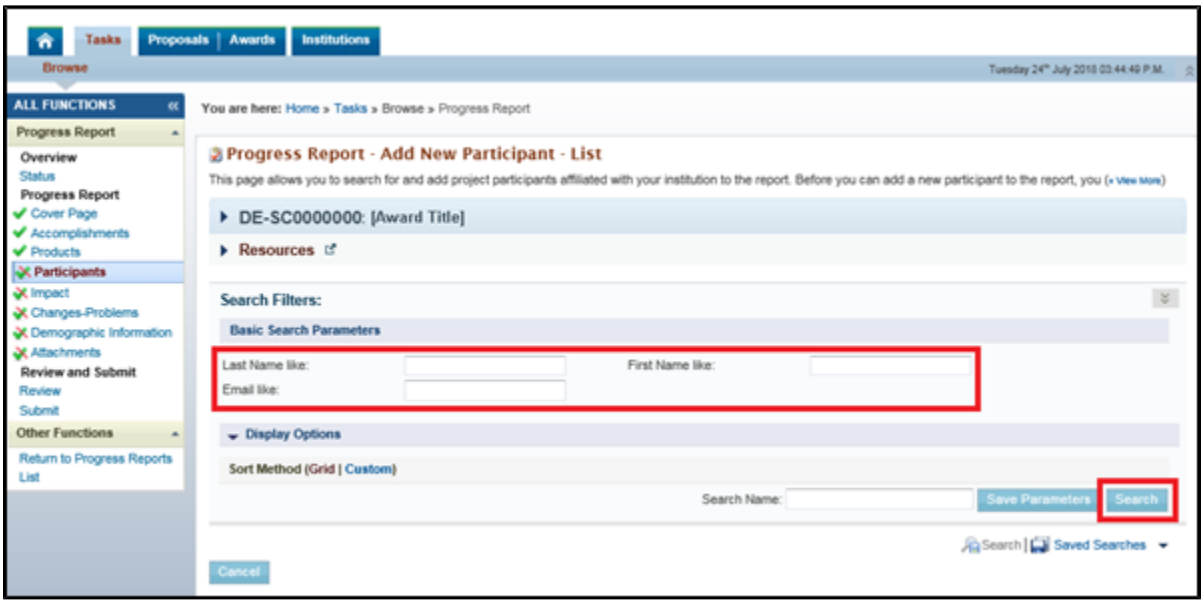

Figure 30. Progress Report – Add New Participant – List

3. Browse the list. When you have found the user you would like to add, click **Add Participant** in the Options column (*Figure 31*).

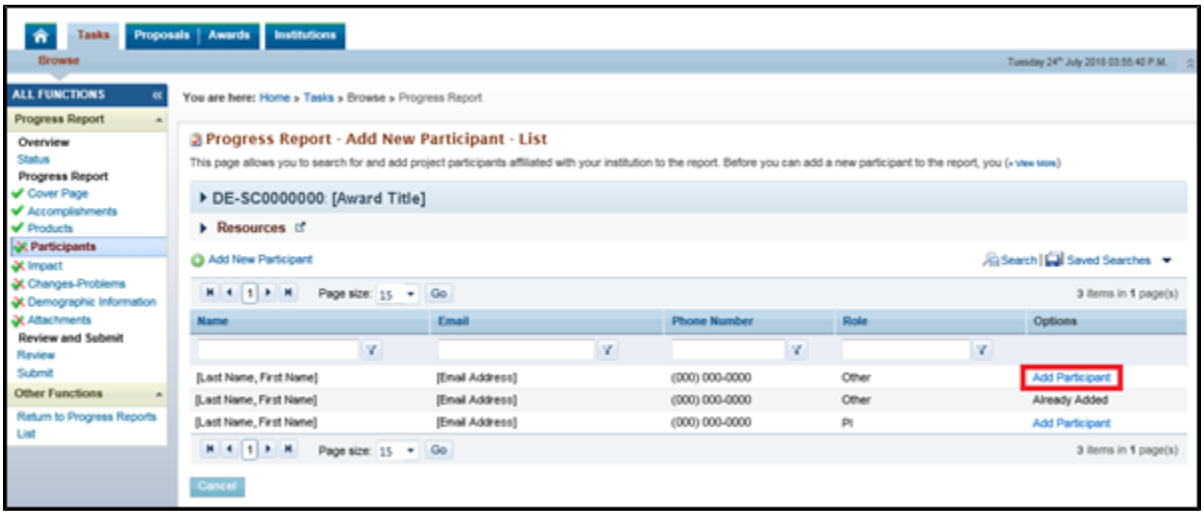

Figure 31. Progress Report – Add New Participant – List, Add Participant

Note	• Only users who are register to the institution will appear in the search results. • Users who are already listed as Participants on the progress report will have an “Already Added” read-only label in the Options column. You cannot add these users again, but you can edit their project information from the Participants section. • If the person you wish to add as a participant does not appear in the list of search results on the Progress Report – Add New Participant – List page, click the **Add New Participant** link above the search results grid (*Figure 31*). PAMS will direct you to the Progress Report – Add New Participant page shown above (*Figure 32*); however, the *First Name* and *Last Name* fields will be empty. Enter the names of the participant, and complete the remaining required fields.

4. PAMS will load the Progress Report – Add New Participant page (*Figure 32*). Refer to the table below to complete the required fields to add a new participant to the progress report.

Required Fields

Element	Description
First Name	The first name of the person you are reporting as a participant will already be entered. You will not be able to edit this field.
Last Name	The last name of the person you are reporting as a participant will already be entered. You will not be able to edit this field.

Project Role	Use the dropdown to select the role the participant filled on the project. If Other, specify the project role in the box to the right of the dropdown.
Person Months Worked	Enter the number of months the person worked on the project. Round the number to the nearest whole number.
Contribution to the Project	Enter a description of the person's contribution to the project.
International Collaboration?	Select the "Yes" or "No" radio button to indicate whether the participant collaborated with any individuals in a foreign country as a part of this project during the reporting period. If "Yes", click the **Add New Country** link above the Country header, and use the dropdown to select the country of the international collaborator.
International Travel?	Select the "Yes" or "No" radio button to indicate whether the participant travelled to a foreign country as a part of this project during the reporting period. If "Yes", click the **Add New Country** link above the Country header, and use the dropdown to select the country to which the participant travelled.

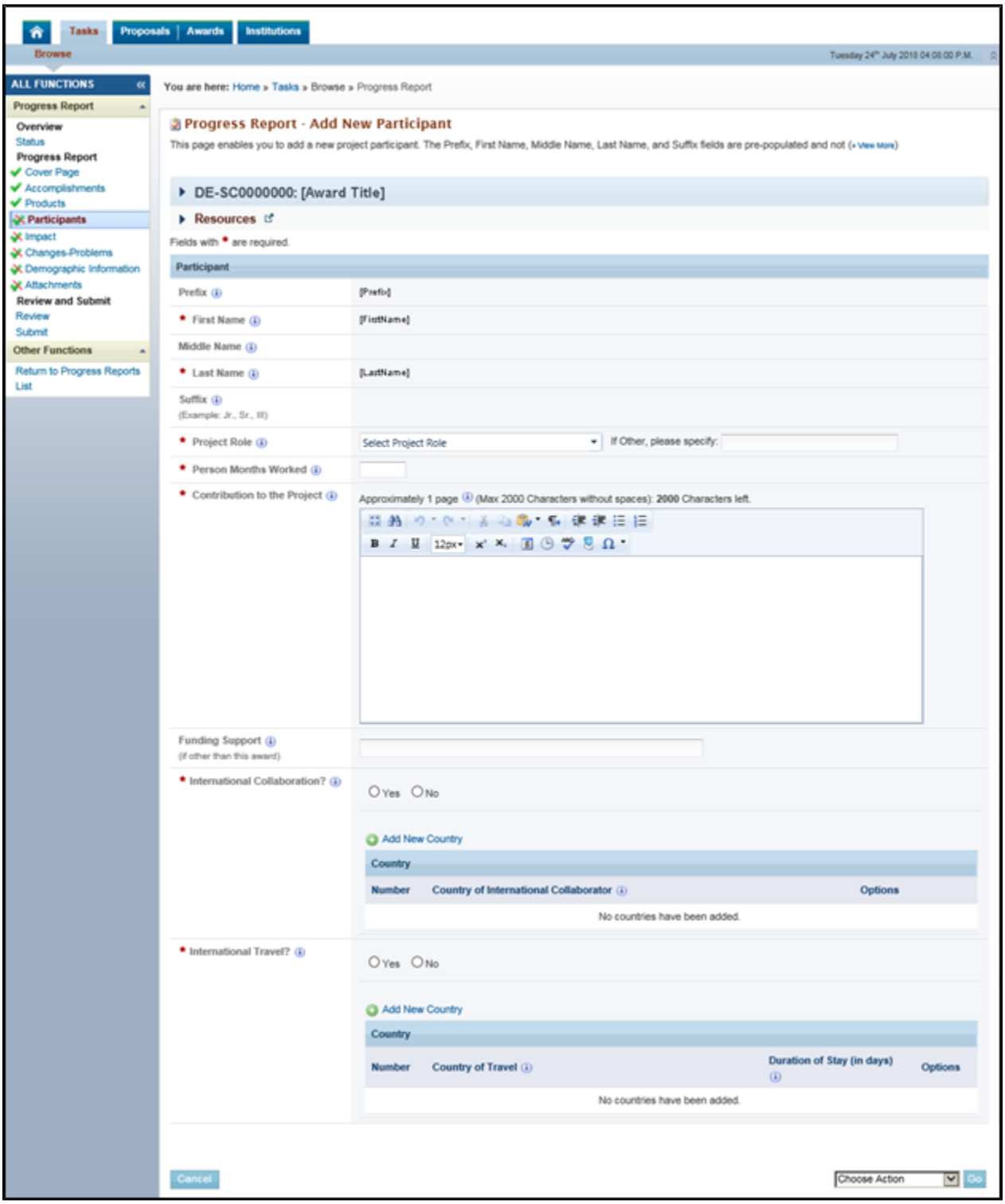

Figure 32. Progress Report – Add New Participant

5. Once you have completed the page, select **Mark as Complete** from the **Choose Action** dropdown and click **Go** to save your work and return to the Progress Report – Participants page (*Figure 33*).

Figure 33. Progress Report – Add New Participant – Choose Action

3.6.2 Adding a New Partner

Partner organizations are any institutions (academic, nonprofit, commercial, or governmental) that have been involved with the project. Involvement will usually consist of financial support, providing facilities, personnel exchange, in-kind support, or research collaboration. Other activities that indicate a similar level of involvement should also be reported. Both foreign and domestic organizations must be reported. Use the following steps to add a New Partner to the progress report.

1. Click the **Add New Partner** link under the Partners header on the Progress Report – Participants page (*Figure 29*).

2. PAMS will load the Progress Report – Add New Partner page (*Figure 34*). Refer to the table below to complete the required fields to add a new partner to the progress report.

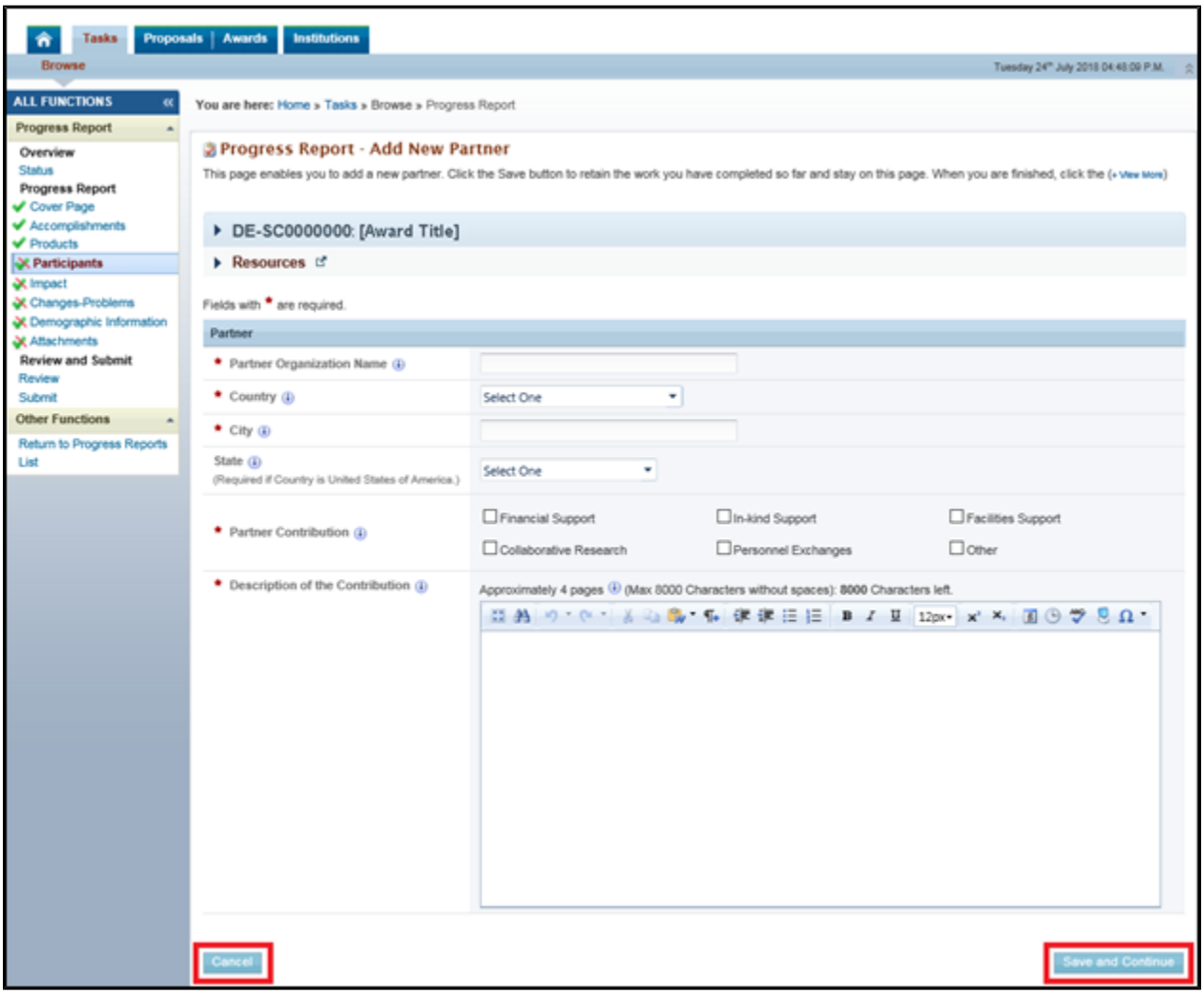

Figure 34. Progress Report – Add New Partner

Required Fields

Element	Description
Partner Organization Name	Enter the name of the organization participating as a partner on this project.
Country	Click the dropdown and select the country in which the organization is located.
City	Enter the city in which the organization is located.
Partner Contribution	Check the boxes to indicate the type of contribution the organization made to the project.
Description of the Contribution	Enter a description of the contribution the organization made to the project.

3. Once you have completed the page, click **Save and Continue** to save your work and return to the Progress Report – Participants page.

3.6.3 Adding Other Collaborators

Other collaborators or contacts are any people or institutions who have made significant contributions to the project but do not meet the definition of Participant or Partner organizations. Consultants and mentors would fit into this category, though many projects will not have any other collaborators or contacts. Use the following steps to add Other Collaborators to the progress report.

1. Click the **Add Other Collaborator** link under the Other Collaborators header on the Progress Report – Participants page (*Figure 29*).

2. PAMS will load the Progress Report – Add Other Collaborator page (*Figure 35*). Refer to the table below to complete the required fields to add an Other Collaborator to the progress report.

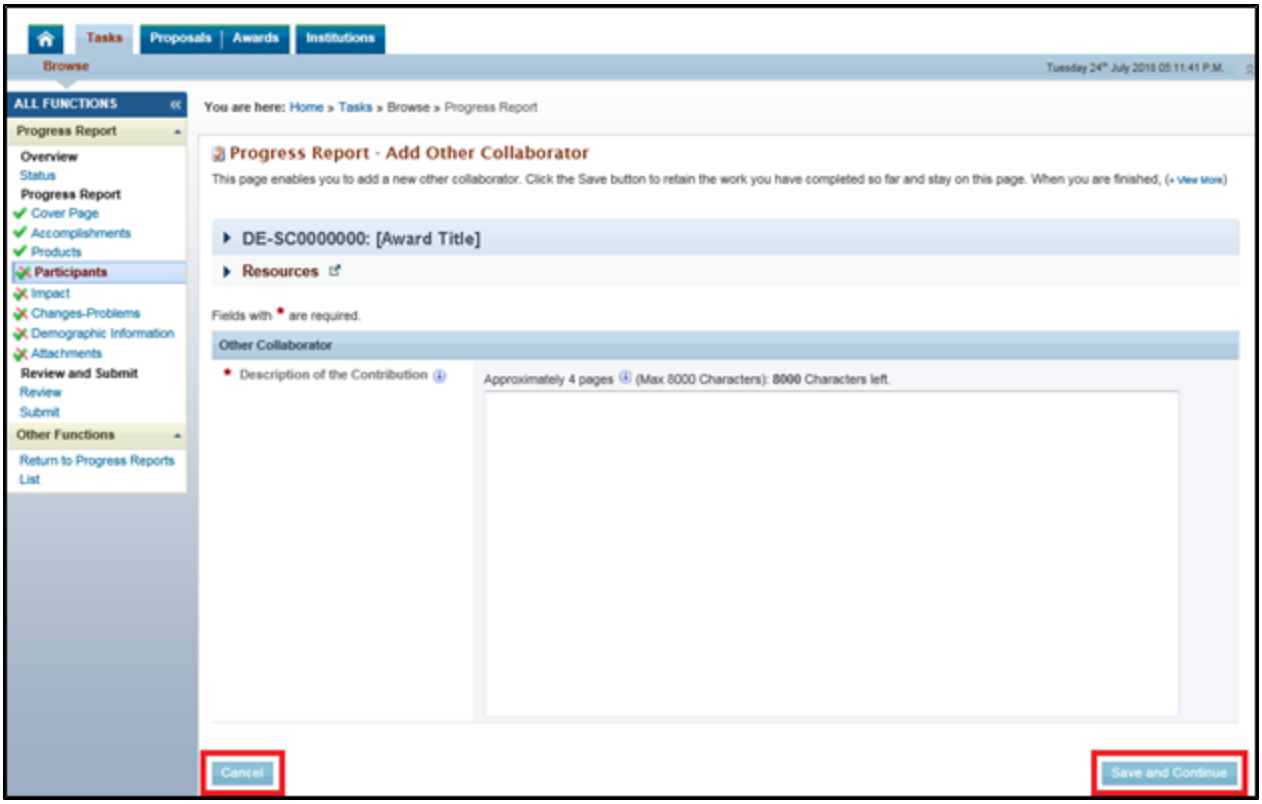

Figure 35. Progress Report – Add Other Collaborator

Required Fields

Element	Description
Description of the Contribution	Enter a description of the contribution.

3. Once you have completed the page, click **Save and Continue** to save your work and return to the Progress Report – Participants page.

3.6.4 Editing Existing Participants

Use the following steps to make any changes to a participant in the Participants section.

3.6.4.1 Updating an Existing Participant

1. Navigate to the Progress Report – Participants page by clicking **Participants** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Mark as Complete** on the Progress Report – Products page (*Figure 11*).

2. Click **Update** in the **Actions/Views** dropdown for the participant you would like to update (*Figure 29*). PAMS will redirect you to the participant's page (refer to the Participant pages above).

3. Click **Save and Continue** in the bottom right corner to save any changes when you are finished, or click **Cancel** in the bottom left corner to cancel any changes.

Note	You can view a participant at any time before submitting the progress report by clicking the **Actions/Views** dropdown on the Progress Report – Participants page and selecting **View**. The participant will load in a popup window on top of the main window. Click the **Close Window** button in the bottom right corner when you are finished.

3.6.4.2 Deleting an Existing Participant

1. Navigate to the Progress Report – Participants page by clicking **Participants** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Mark as Complete** on the Progress Report – Products page (*Figure 11*).

2. Click **Delete** in the **Action/Views** dropdown for the participant you would like to delete (*Figure 29*).

3. PAMS will display a Confirmation message asking if you are sure you want to delete the participant (*Figure 36*). Read the message carefully. If you are sure you want to delete the participant, click **Confirm**. If you do not want to delete the participant, click **Cancel**.

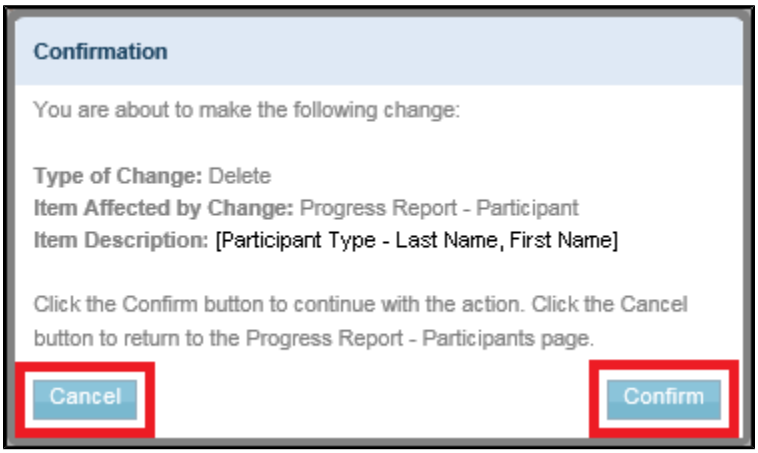

Figure 36. Progress Report – Participant – Delete Participant Confirmation Message

4. PAMS will load a Success message confirming that the participant was deleted successfully (*Figure 37*).

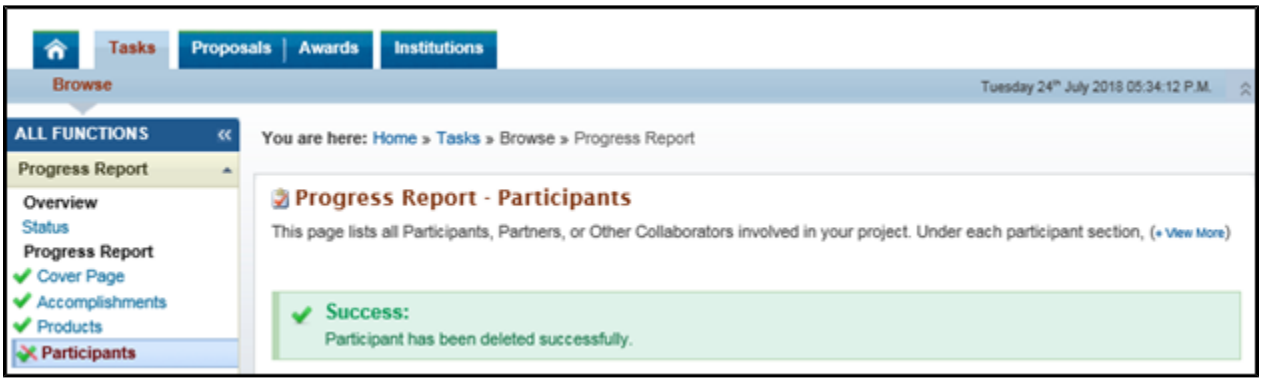

Figure 37. Progress Report – Participant – Delete Participant Success Message

3.6.5 Marking the Participants Section as Complete

Use the following steps to mark the Participants section of the progress report as complete.

1. Once you have completed the Participants section, click **Mark as Complete** in the bottom right corner of the page (*Figure 29*).

2. PAMS will redirect you to the next section and display a Success message confirming that the Products page was marked as complete successfully (*Figure 38*).

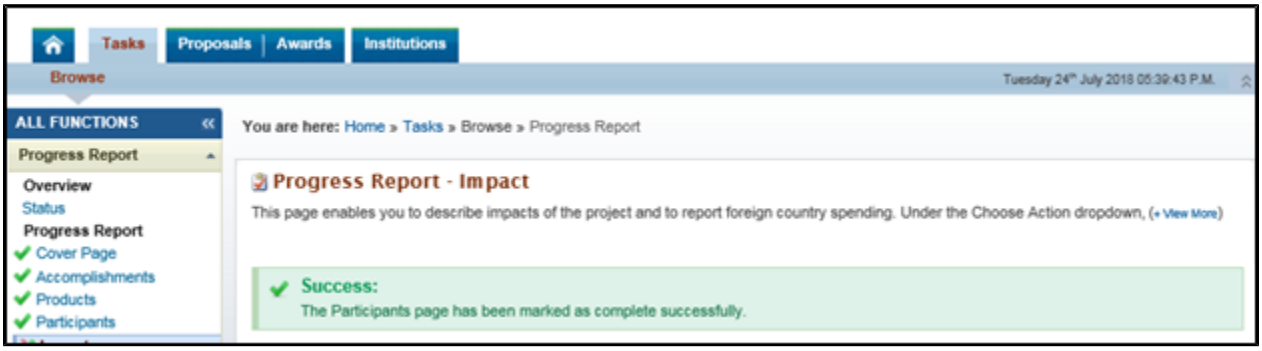

Figure 38. Progress Report – Participant Success Message

3.7 Completing the Impact Section

The Impact section of the progress report enables you to describe the impact of the project and to report spending in foreign countries. Impact is tracked with a list of five questions pertaining to the development of the project's principal disciplines, other disciplines, human resources, resources that form infrastructure, technology transfer, and society as a whole. Use the following steps to complete the Impact section of the progress report.

1. Navigate to the Impact section by clicking **Impact** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Mark as Complete** on the Progress Report – Participants page (*Figure 29*).

2. PAMS will load the Progress Report – Impact page (*Figure 39*). Fill in each textbox as appropriate.

Note	Textboxes that are left blank are marked as "Nothing to Report".

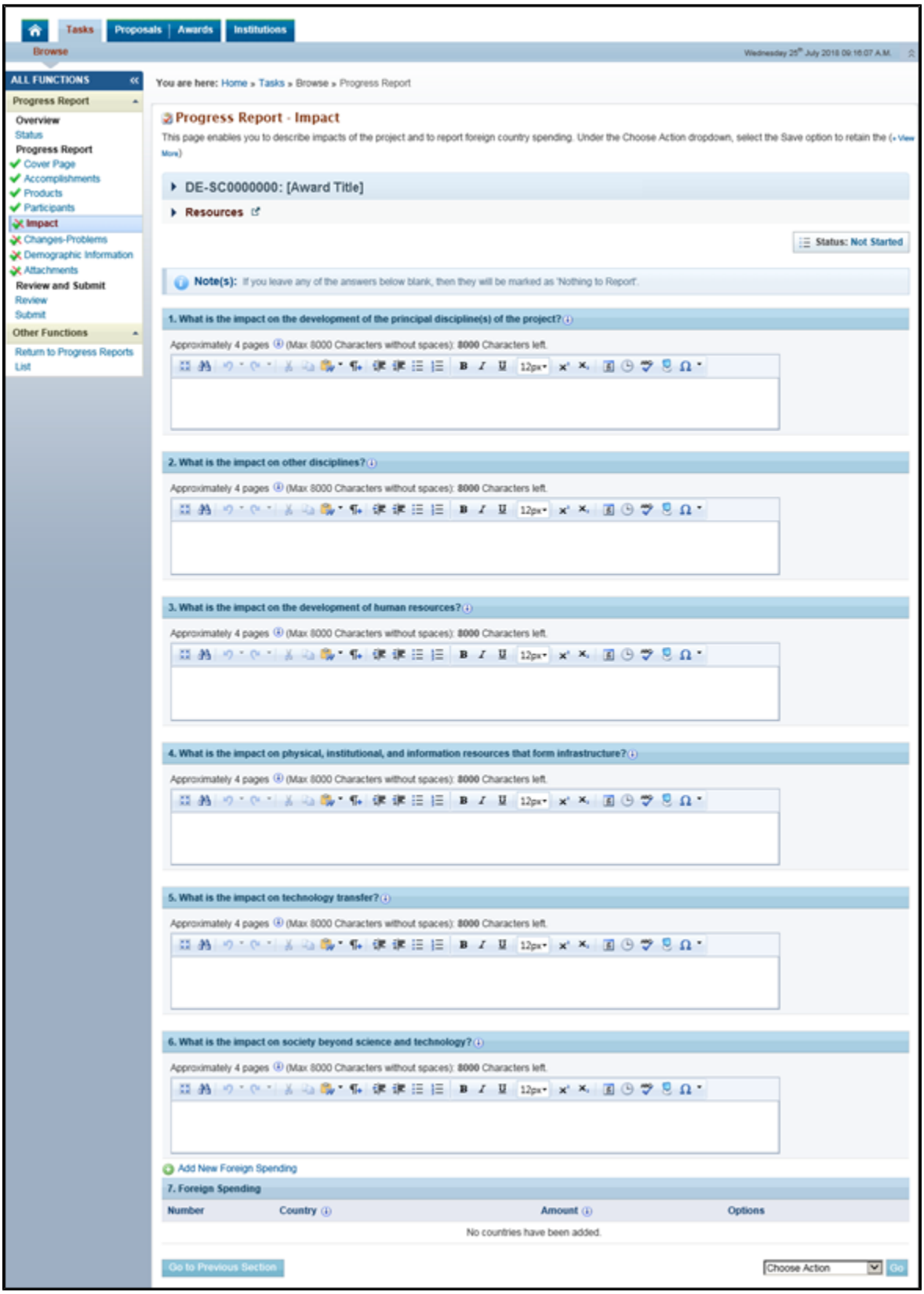

Figure 39. Progress Report – Impact

3.7.1 Adding New Foreign Spending

If this project required foreign spending, you will need to report it in the progress report. Use the following steps to complete the Foreign Spending section on the Impact page.

1. Click **Add New Foreign Spending** above the Foreign Spending header on the Progress Report – Impact page (*Figure 40*).

Figure 40. Progress Report – Impact – Foreign Spending

2. PAMS will add an empty row to the Foreign Spending section. Click the Country dropdown to select the country in which the funds were spent (*Figure 41*).

3. Enter the dollar amount of the award's funds spent in the foreign country.

Figure 41. Progress Report – Impact – Foreign Spending, Information

Note	You can delete the Foreign Spending entry at any point before submission by clicking the red **X** in the Options column next to the entry.

3.7.2 Marking the Impact Section as Complete

Use the following steps to mark the Impact section of the progress report as complete.

1. Once you have completed the Impact section, select **Mark as Complete** from the **Choose Action** dropdown and click **Go** (*Figure 42*).

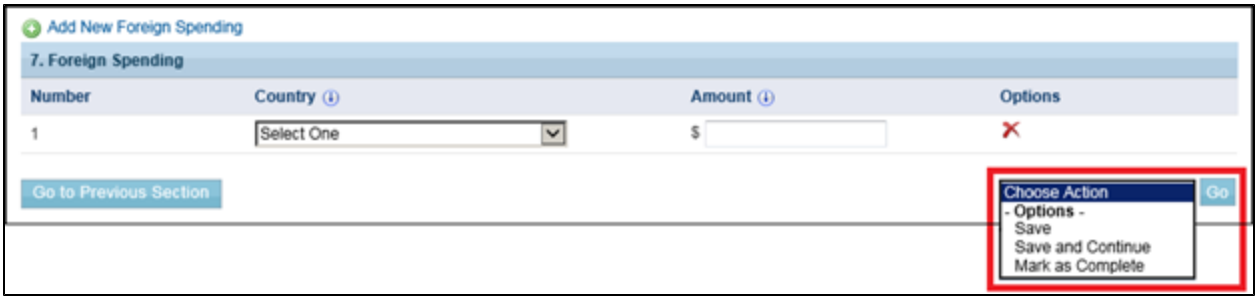

Figure 42. Progress Report – Impact – Choose Action

2. PAMS will redirect you to the next section and display a Success message confirming that the Products page was marked as complete successfully (*Figure 43*).

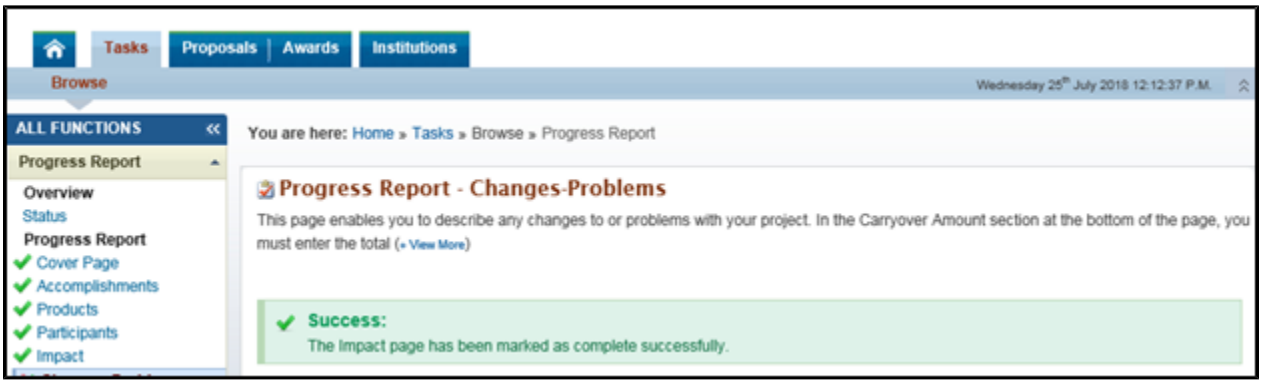

Figure 43. Progress Report – Impact – Success Message

3.8 Completing the Changes-Problems Section

The Changes-Problems section of the progress report enables you to describe any changes and/or problems with your project. This is tracked with a list of six questions pertaining to changes in the project's approach, actual or anticipated problems, potential expenditure changes, changes in the use or care of live subjects or biohazardous material, change in project site location, and budget carryover amount. Use the following steps to complete the Changes-Problems section of the progress report.

1. Navigate to the Changes-Problems section by clicking **Changes-Problems** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or by selecting **Mark as Complete** on the Progress Reports – Impact page (*Figure 42*).

2. PAMS will load the Progress Report – Changes-Problems page (*Figure 44*). Fill in each textbox as appropriate.

Note	• Textboxes that are left blank are marked as "Nothing to Report". • The Carryover Amount section is required and cannot be left blank.

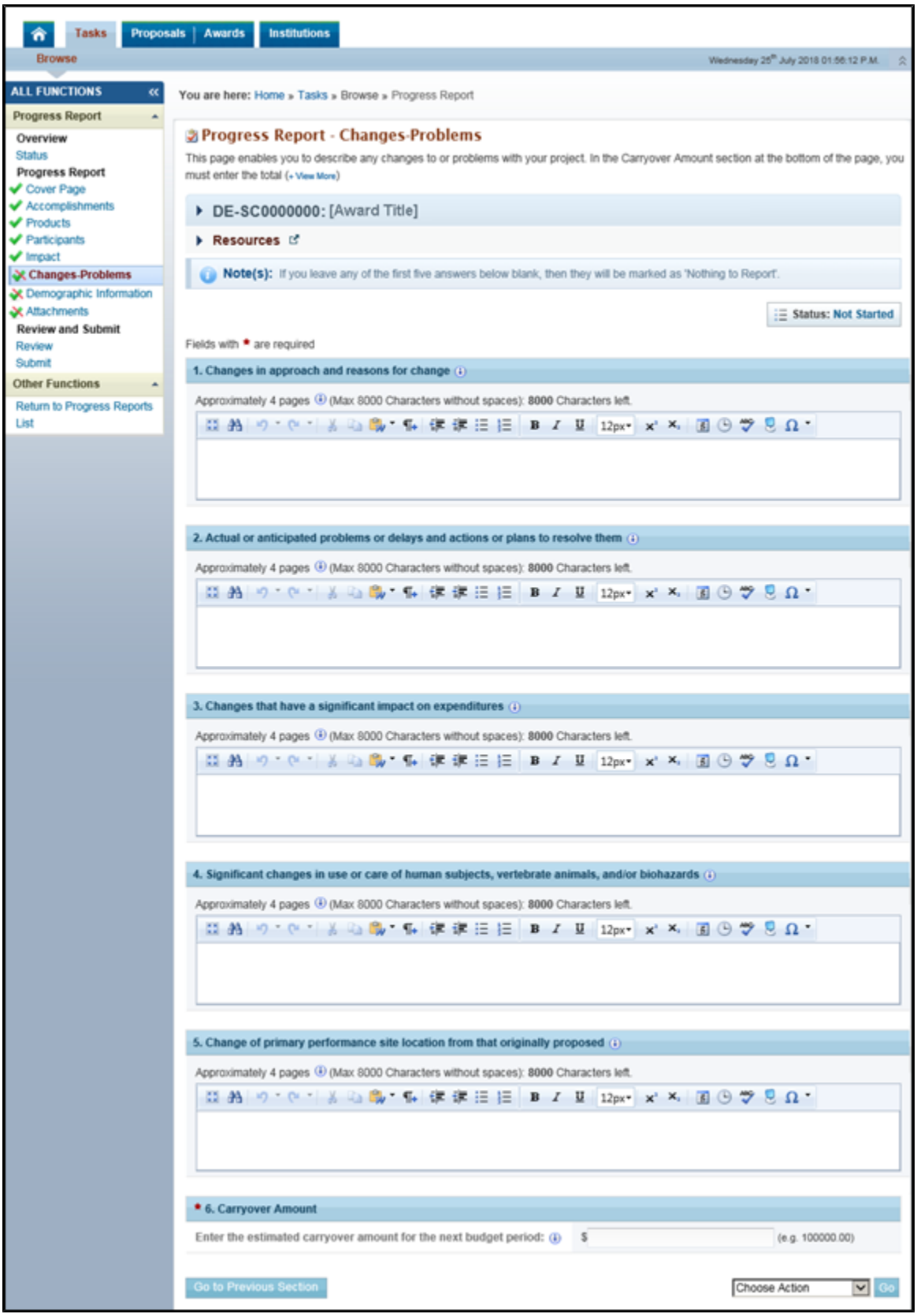

Figure 44. Progress Report – Changes-Problems

3. Once you have completed the Changes-Impact section, select **Mark as Complete** from the **Choose Action** dropdown in the bottom right corner of the page and click **Go** (*Figure 45*).

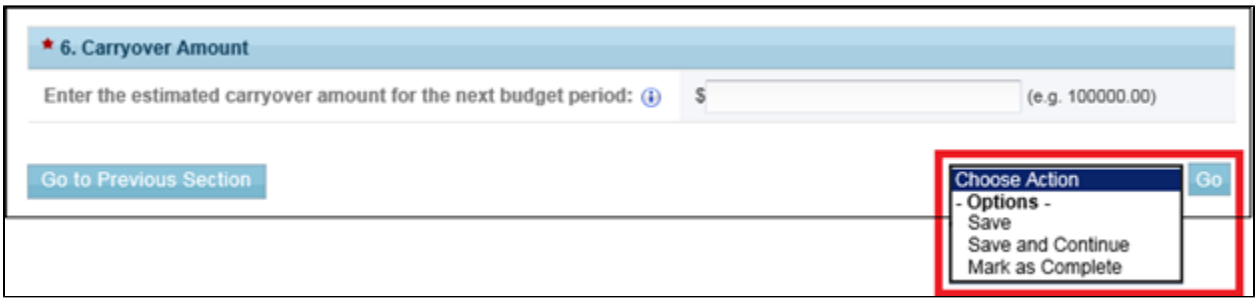

Figure 45. Progress Report – Changes-Problems – Choose Action

4. PAMS will redirect you to the next section and display a Success message confirming that the Changes-Problems page was marked as complete successfully (*Figure 46*).

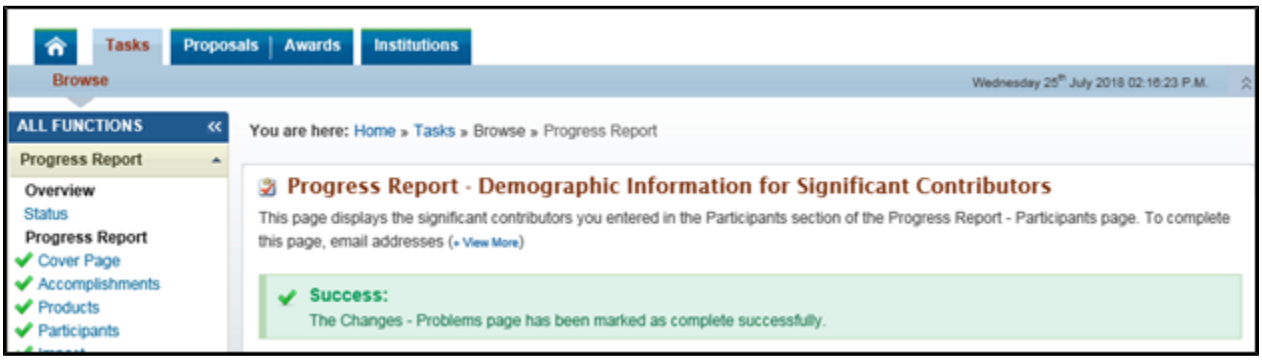

Figure 46. Progress Report – Changes-Problems Success Message

3.9 Completing the Demographic Information for Significant Contributors Section

This page displays the significant contributors entered in the Participants section of the Progress Report – Participants page. To complete this page, email addresses must be provided for all contributors. Use the following steps to complete the Demographic Information for Significant Contributors section of the progress report.

1. Navigate to the Demographic Information for Significant Contributors section by clicking **Demographic Information** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or by selecting **Mark as Complete** on the Progress Reports – Changes-Problems page (*Figure 45*).

2. PAMS will load the Progress Report – Demographic Information for Significant Contributors page. Ensure that each user has an email address listed. If an email address is missing, click **Update** in the **Actions/Views** dropdown in the Options column (*Figure 47*).

Note	• You will not be able to update the email address for registered users. Upon submission of the progress report, PAMS will send an automatic email to the contributors you listed who are not registered in PAMS, inviting them to register. • You can view a contributor's information by selecting **View** in the **Actions/Views** dropdown on the Progress Report – Demographic Information for Significant Contributors page. The information will load in a popup window on top of the main window. Click the **Close Window** button in the bottom right corner when you are finished.

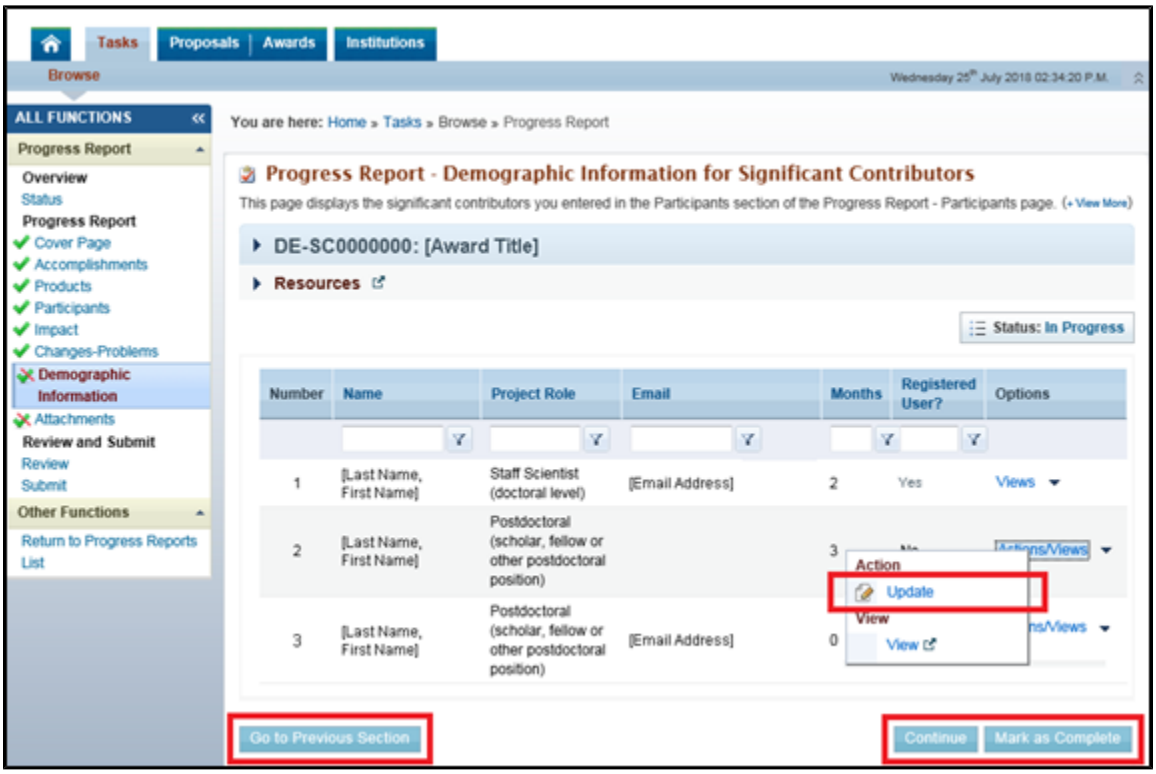

Figure 47. Progress Report – Demographic Information for Significant Contributors

3. PAMS will load the Progress Report – Update Demographic Information for Significant Contributors page (*Figure 48*). Enter the user's email address.

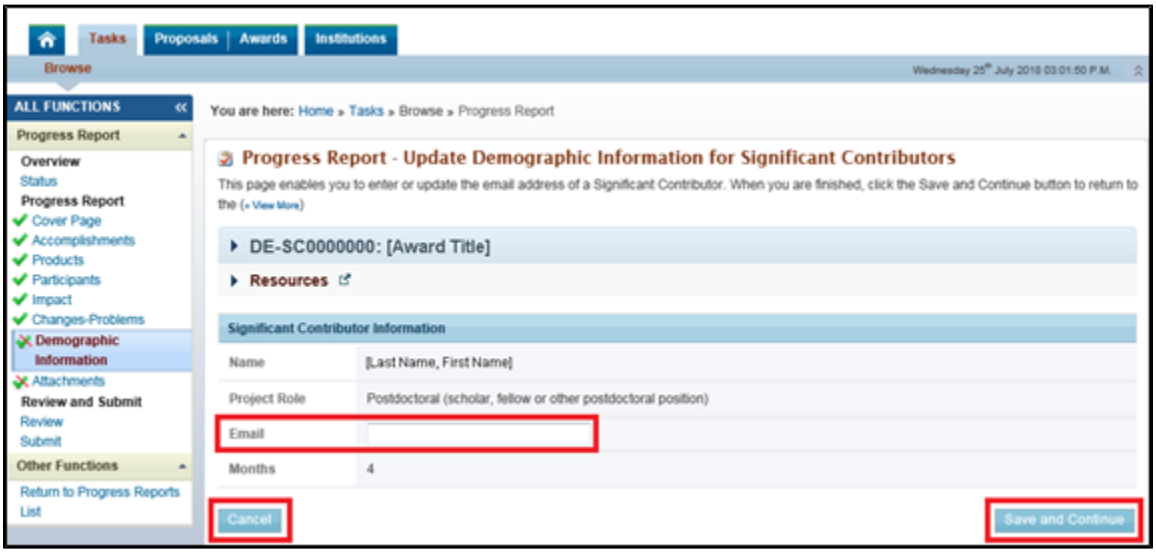

Figure 48. Progress Report – Update Demographic Information for Significant Contributors

4. When you are finished, click **Save and Continue** in the bottom right corner of the page to save your changes, or click **Cancel** in the bottom left corner to return to the Progress Report – Demographic Information for Significant Contributors page without saving any changes.

5. PAMS will display a Success message confirming that the information was saved successfully (*Figure 49*).

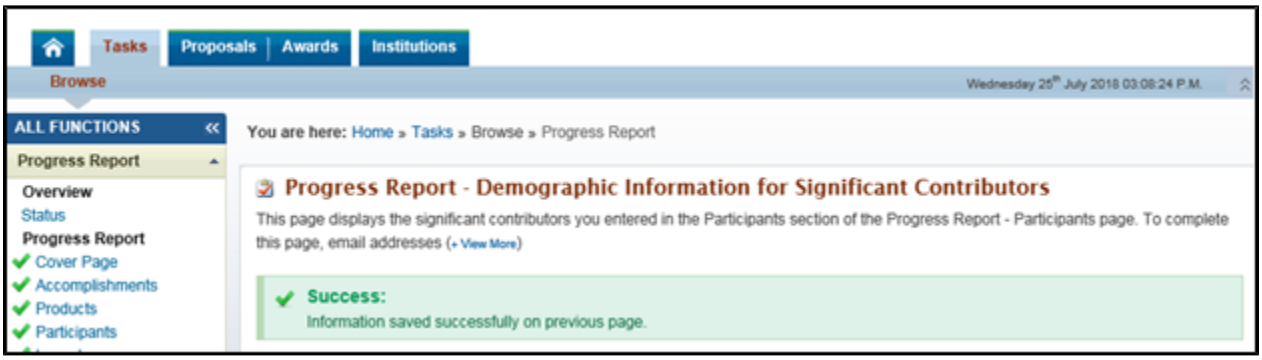

Figure 49. Progress Report – Update Demographic Information for Significant Contributors Success Message

6. Once you have completed the Demographic Information for Significant Contributors section, click **Mark as Complete** in the bottom right corner of the page (*Figure 47*).

7. PAMS will redirect you to the next section and display a Success message confirming that the Demographic Information for Significant Contributors page was marked as complete successfully (*Figure 50*).

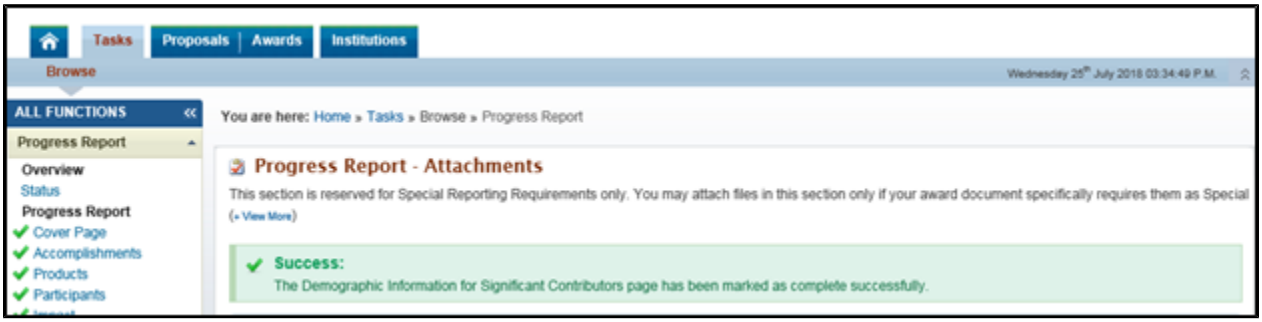

Figure 50. Progress Report – Demographic Information for Significant Other Success Message

3.10 Completing the Attachments Section

The Attachments section of the progress report is reserved for Special Reporting Requirements. If the Reporting Requirements Checklist attached to your award does not require the use of attachments, do not use this section of the progress report. If your award does contain Special Reporting Requirements, use the steps below to submit the proper attachments.

1. Navigate to the Attachments section by clicking **Attachments** in the left navigation menu, **Update** in the Options column on the Progress Report – Status page (*Figure 5*), or **Mark as Complete** on the Progress Reports – Demographic Information for Significant Contributors page (*Figure 47*).

2. PAMS will load the Progress Report – Attachments page. To add attachments, click **Attach File** in the Special Reporting Requirements header (*Figure 51*).

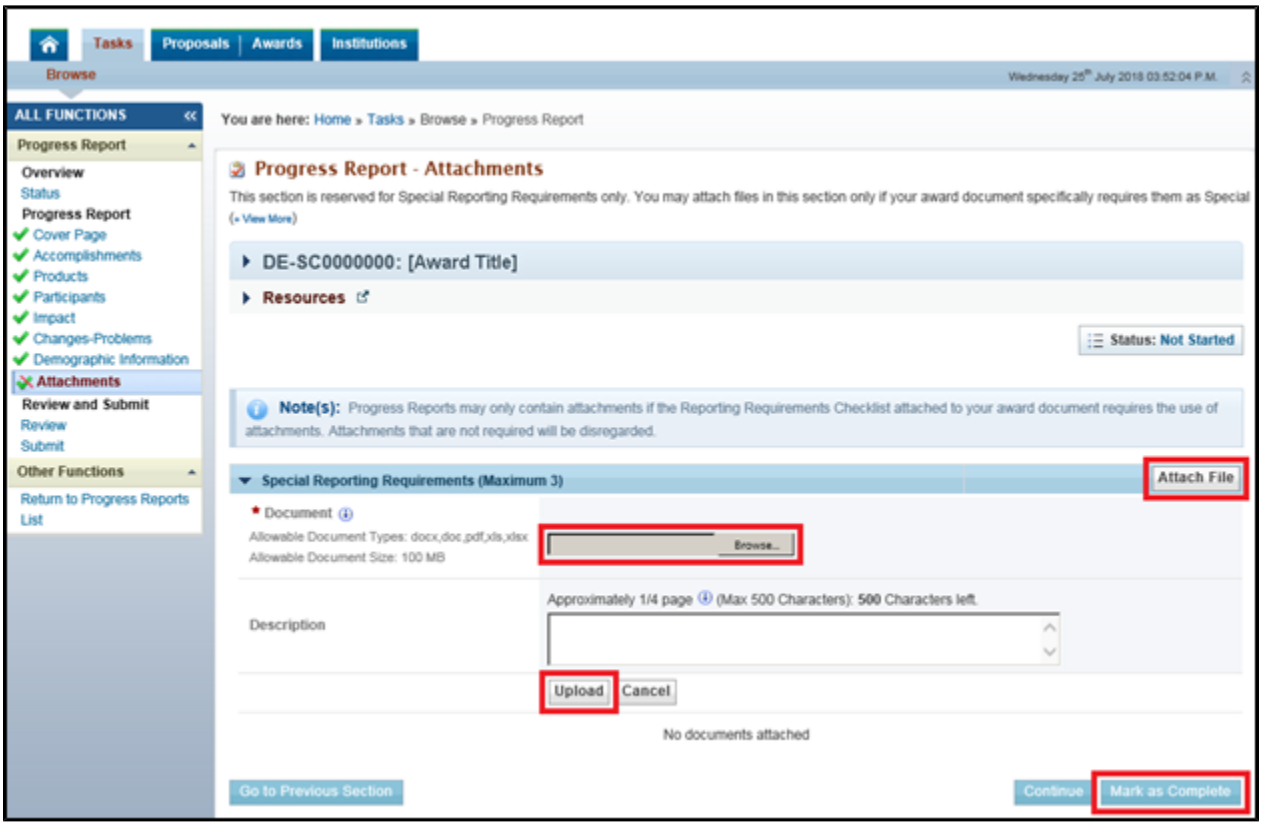

Figure 51. Progress Report – Attachments

3. Click **Browse**, and select the files you would like to attach to the progress report (*Figure 51*).

Note	• You can attach a maximum of three (3) attachments. • You can include a description of 500 characters or less for the attachments in the Description box in the Special Reporting Requirements section.

4. Once you have selected the files you would like to attach, click **Upload** (*Figure 51*).

Note	To edit the Attachment Description or delete the attachment, click the **Actions** dropdown in the Options column and select the appropriate action.

5. Once you have completed the Progress Report – Attachments page, or if you are skipping this page, click **Mark as Complete** in the bottom right corner of the page (*Figure 51*).

6. PAMS will redirect you to the next section and display a Success message confirming that the Progress Report – Attachments page was marked as complete successfully (*Figure 52*).

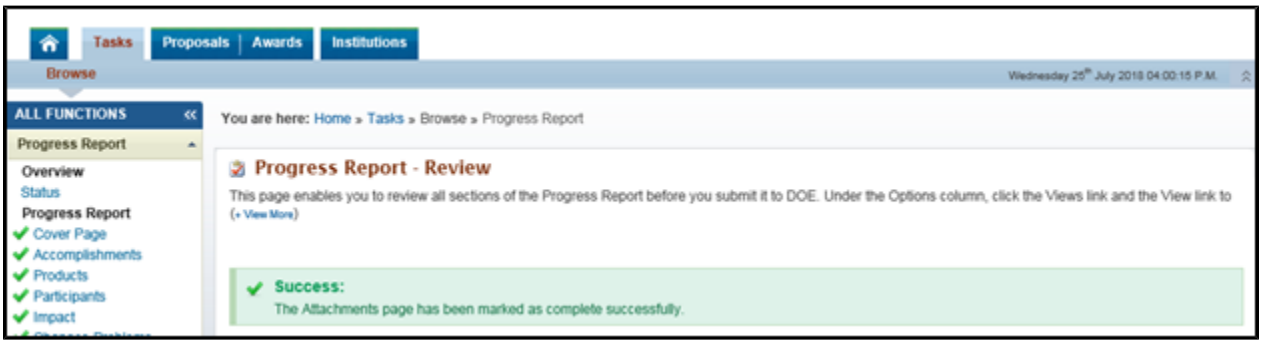

Figure 52. Progress Report – Attachments Success Message

3.10.1 Editing an Attachment

Use the following steps to edit an attachment in the Special Reporting Requirements section on the Progress Report – Attachments page.

1. Select **Update Description** in the **Actions** menu in the Options column (*Figure 53*).

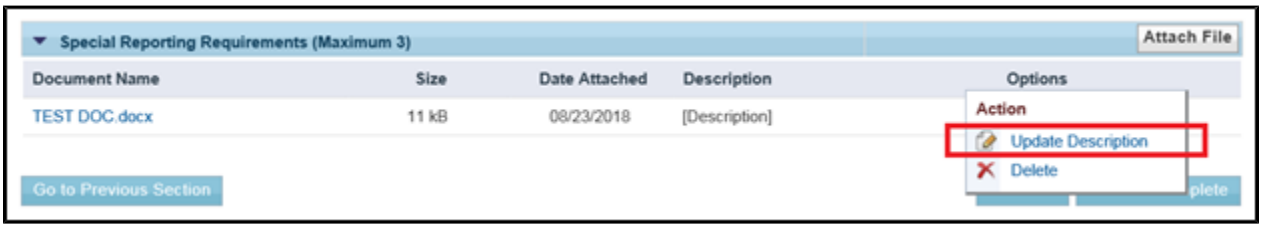

Figure 53. Progress Report – Attachments – Update Description

2. Click **Save** when you are finished to save any changes, or click **Cancel** to cancel any changes (*Figure 54*).

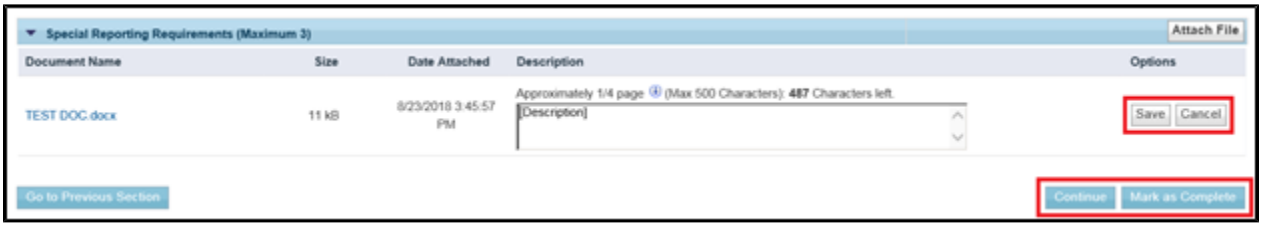

Figure 54. Progress Report – Attachments – Update Description Save/Cancel

3.10.2 Deleting an Attachment

Use the following steps to delete an attachment in the Special Reporting Requirements section on the Progress Report – Attachments page.

1. Select **Delete** in the **Actions** menu in the Options column (*Figure 55*).

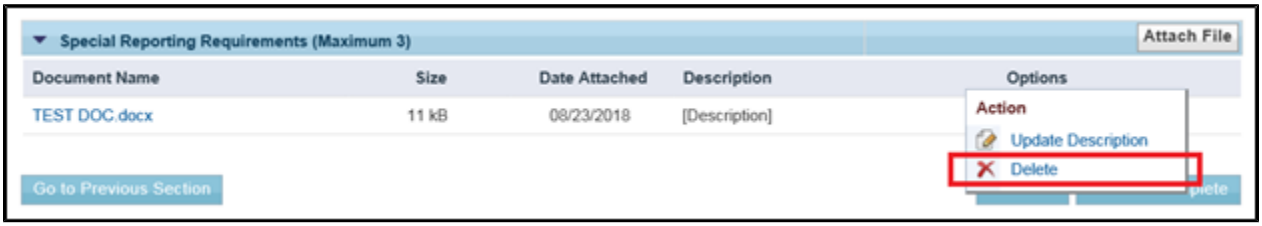

Figure 55. Progress Report – Attachments – Delete

2. PAMS will display a Confirmation message asking if you are sure you want to delete the attachment (*Figure 56*).If you are sure you want to delete the attachment, click **Confirm**. If you do not want to delete the attachment, click **Cancel**. PAMS will reload the Progress Report – Attachments page, and the attachment will no longer display in the Special Reporting Requirements section.

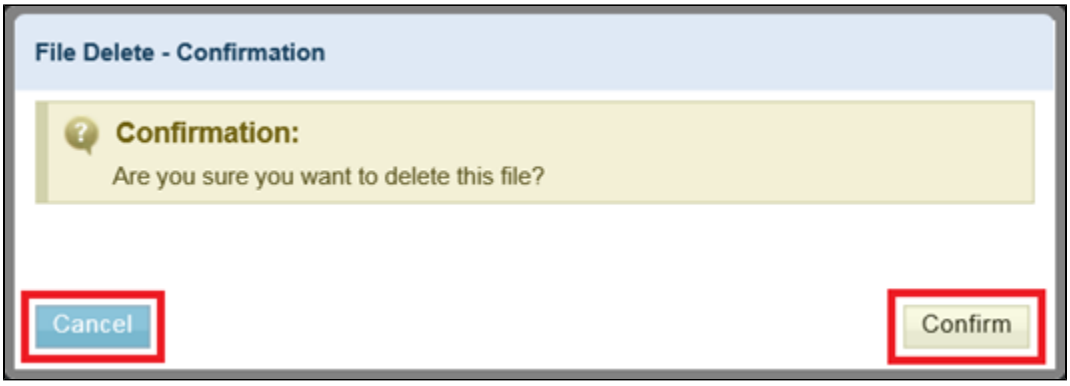

Figure 56. Progress Report – Attachments – Delete Attachment Confirmation Message

4 Reviewing and Submitting a Progress Report

Use the following steps to review and submit the progress report.

4.1 Reviewing a Progress Report

The Progress Report – Review section enables you to review all sections of the progress report before submitting to DOE. Use the following steps to review any section of the progress report.

1. Navigate to the Review page by clicking **Review** in the left navigation menu (*Figure 5*). PAMS will load the Progress Report – Review page, which displays a summary of the progress report's eight sections (*Figure 57*).

2. To review a section, click **View** in the **Views** dropdown menu in the Options column.

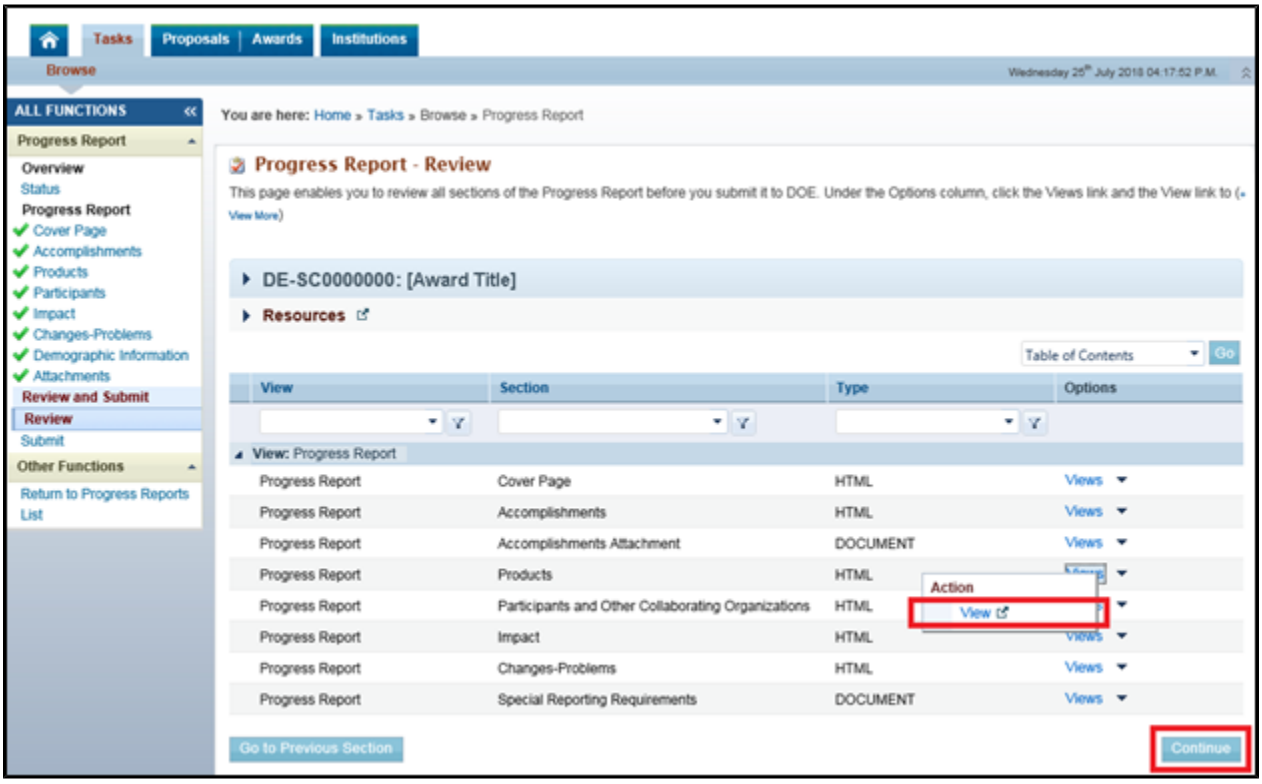

Figure 57. Progress Report – Review, View

3. The section will load as a read-only page in a popup window on top of the main window. Click the **X** in the top right corner of the popup to close the window when you are finished.

4. If you would like to return to a previous section and make updates, click the section's link in the left navigation menu (*Figure 57*). (Refer to the appropriate module above for guidance on completing each section of the progress report.)

5. When you are finished reviewing the progress report on the Progress Report – Review page, click the **Continue** button in the bottom right corner of the page (*Figure 57*).

4.2 Submitting a Progress Report

Use the following steps to submit the progress report to DOE.

1. Navigate to the submission page by clicking **Continue** on the Progress Report – Review page, or **Submit** in the left navigation menu (*Figure 57*).

2. PAMS will load the Progress Report – Submit page, which displays a summary of the progress report sections with their completion status (*Figure 58*). Each section should display "Complete" with a green checkmark in the status column. If a section is incomplete (marked as "In Progress" or "Not Started" with a green checkmark with a red slash), click the **Update** button for the section. (Refer to the appropriate module above for guidance on completing the section successfully.)

3. Click the **Preview Progress Report PDF** button in the bottom right corner of the page to preview the progress report before submitting (*Figure 58*). This is your last opportunity to review the progress report before submitting it to DOE.

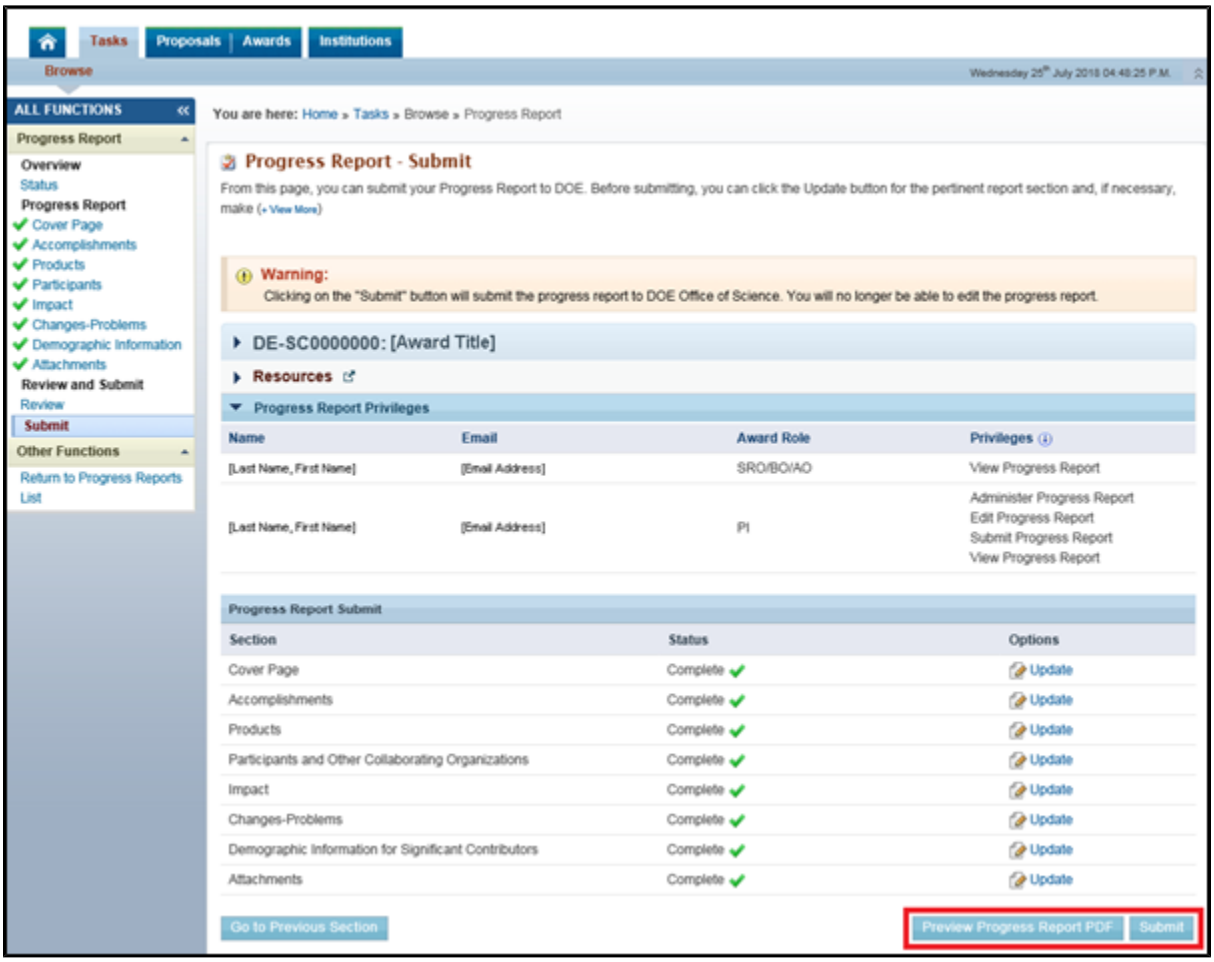

Figure 58. Progress Report – Submit

4. PAMS will generate a preview PDF of the progress report in a popup on top of the main window. This may take a few moments. Once the PDF has generated, review it carefully. When you are finished reviewing, click the **X** in the top right corner of the popup to close the window.

5. If you would like to edit a section, click **Update** in the Options column for that section. If you are ready to submit the progress report, click **Submit** in the bottom right corner of the page. (*Figure 58*)

Note	Clicking **Submit** will submit the progress report to DOE. You will not be able to make any changes to the progress report once it has been submitted.

6. PAMS will redirect you to the Progress Report – List page and display a Success message confirming that the progress report was submitted successfully (*Figure 59*).

Figure 59. Progress Report – List, Success Message