

## PAM Tips and Reminders (3/27/2026)

### **Ancillary Reviews:**

1) Preparing for an Ancillary Review. Before sending an Ancillary Review request to another office or division, make sure that the documentation necessary for that other office's review and approval is already available within the PAM proposal or award record.

#### Example

Submission to Provost/Vice Provost: If you submit an Ancillary Review to the VPR in order to obtain approval for PI eligibility, make sure the completed and signed PI Eligibility form is uploaded to the proposal record.

Obtaining approval of a second Division Chair: Division A is preparing a proposal that contains a co-PI from Division B; as such, Chairs of both Division A and B must approve the proposal in PAM. Division A is responsible for obtaining the approval of the Division B Chair, which occurs by submission of an Ancillary Review request to Division B. Division A should make sure the proposal is complete enough for the Division B Chair to perform their review and provide approval.

2) Creating an Ancillary Review: Each administrative office handles specific policy issues. A separate Ancillary Review should be created for each office from which you need input/approval, for each proposal. Please use the Comments field of an Ancillary Review to clarify exactly what you need reviewed/approved. The more detail you provide the faster you will likely receive your response/approval.

Separately, if you have multiple issues for review/approval by the same office for a single proposal, you need only submit one Ancillary Review to that office. Select one of those issues in the drop-down menu and then identify in the Comments box each issue you need addressed.

#### Example

Submission to the Provost/Vice Provost: You are preparing a proposal that includes requires approval for both reduced overhead (MORA) and PI Eligibility. Because the Provost Office approves MORA and the Office of VP for Research approves PI Eligibility, you would create two, separate Ancillary Review, one to each office.

If that proposal also includes funding to JPL and/or subawards totaling 50% or more of total costs, plus the Division Chair is PI/co-PI on the proposal, you would still submit just two Ancillary Review, but for the Ancillary Review directed to the Provost's Office, you would identify one of the issues ("MORA Approval, Division

Chair as PI Approval, “JPL/Subaward  $\geq$  50% TC”) in the Review Type drop down, and then explain the other two issues in the Comments box.

3) Sending an Ancillary Review: When selecting a target person or organization for an Ancillary Review, you can only select one Organization or one Person. Sending to an Organization will include notifications to all individuals within that Organization who normally review/approve Ancillary Reviews for that Organization.

#### Example

MORA Review/Approval: The Provost’s Office reviews/approves reductions in overhead recovery (MORA). By selecting the Organization “Office of the Provost” for an Ancillary Review, all three individuals in that office who handle MORA reviews will receive notification and any of them can act upon it.