

Post-Award Tasks (PAT) – Manage References

Training Document

Homepage

PIEE

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PAT

Manage References

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This training document goes over the Manage References function within the PAT application. Manage References is a feature within PAT, designed for select individuals serving as PAT Administrators to maintain important data leveraged by PAT Tasks. These include Key Requirements, Clauses, Keywords, and Post Award Orientation Recommendation values.

Roles

Access to Post-Award Tasks (PAT) Tasks Feature – Manage References

Roles and Access: Access to Manage References is only available to users registered for a **PAT Administrator** role.

Manage References

To access the Manage References section, select the **Manage References** option within the PAT navigation panel.

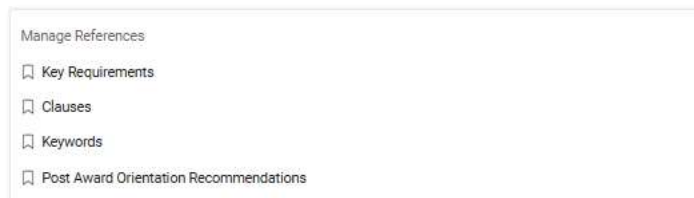


The Manage References screen displays, select the desired PAT Reference from the available menu.

Manage References Options:

- [Key Requirements](#)
- [Clauses](#)
- [Keywords](#)
- [Post Award Orientation Requirements](#)

Selecting a specific PAT Reference populates a “**Manage**” table that allows for adding, editing, activating, and deactivating.



Key Requirements (KRs)

Selecting the Key Requirements option displays the **Manage Key Requirements** page.

Manage Key Requirements Columns:

- KR
- Description
- Awareness Requirement(s)
- R9 Code(s)
- Special Provision
- Active Indicator
- Created By
- Created Date
- Last Updated By
- Last Updated Date
- Action(s)
 - [Edit Key Requirement](#) (select to display the Edit KR modal)
 - [Activate Key Requirement](#) (select to display the Activate Key Requirement confirmation message)
 - [Deactivate Key Requirement](#) (select to display the Deactivate Key Requirement confirmation message)

Buttons:

- [Add KRs](#) (select to display the Add KR modal)
- Clear (select Clear to remove all sorting and filters)
- Export (select Export to export the Key Requirements results to an Excel sheet)
- Back

NOTE: Columns are sortable and filterable.

Manage Key Requirements (KRs)

[+ Add KR](#)
[Clear](#)
[Export](#)

KR	Description	Awareness Requirement(s)	R9 Code(s)	Special Provision	Active Indicator	Created By	Created Date	Last Updated By	Last Updated Date
KR-AO-0001	Ground and Flight Risk/Aircraft Flight Risk	AQ, QA		G	No		2025-02-12		2025-08-29
KR-AO-0002	Mishap Reporting & Investigation Involving Aircraft Missiles & Space Launch Vehicles	QA		G	Yes		2025-02-12		2025-08-29
KR-AO-0005	Contractor's Flight and Ground Operations	AQ, QA			Yes		2025-02-12		2025-08-29
KR-AO-0014	Public Aircraft and State Aircraft Operations - Liability				Yes		2025-02-12		2025-08-29
KR-AO-0015	Ground and Flight Risk/Aircraft Flight Risk	AQ, QA			Yes		2025-02-13		2025-08-29
KR-AO-0016	test test	MFQ			No		2025-05-05		2025-08-29

Records: 1 to 10
1 2 3 4 5 6 7 8 9 10
194 Records Returned

Add KRs

Select the **Add KRs** button to display the Add KR modal. Enter the applicable information and select **Submit** to add a new KR. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Add KR Fields:

- Functional Area *
- Description *
- Awareness Requirement(s)
- R9 Code(s) (*R9 codes are multi-select*)
- Special Provision Code (*only one Special Provision code is permitted*)

Buttons:

- Submit (*select Submit to submit the new KR*)
- Cancel

Add KR

* Asterisk indicates required entry.

Functional Area *

Description *

Awareness Requirement(s)

R9 Code(s)

Special Provision Code

✓ Submit ⓧ Cancel

Edit Key Requirement

To edit a KR, select the **Edit Key Requirement** button within the Action(s) column. The Edit KR modal displays. Enter the applicable information into the fields and select the **Submit** button to proceed. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Edit KR Fields:

(fields are pre-populated)

- Functional Area * (field is auto-populated)
- Description *
- Awareness Requirement(s)
- R9 Code(s) (R9 codes are multi-select)
- Special Provision Code (only one Special Provision code is permitted)

Buttons:

- Submit (select Submit to submit the KR edits)
- Cancel

NOTE: Asterisk indicates required entry on every page.

Edit KR

* Asterisk indicates required entry.

Functional Area * AO - Aircraft Operations

Description *

Mishap Reporting & Investigation Involving Aircraft Missiles & Space Launch Vehicles

Awareness Requirement(s)

QA - Quality

R9 Code(s)

Select one or more...

Special Provision Code

G - FLIGHT OPERATIONS INVOLVED (AIRCRAFT ACCEPTANCE)

✓ Submit ⓧ Cancel

Activate Key Requirement

To activate a KR, select the **Activate Key Requirement** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to activate KR: [Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.

Activate KR ✕

Are you sure you want to activate KR: KR-AO-0001 - Ground and Flight Risk/Aircraft Flight Risk?

No Yes

Deactivate Key Requirement

To deactivate a KR, select the **Deactivate Key Requirement** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to Deactivate KR: [Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.



Clauses

Selecting the Clauses option displays the **Manage Clauses** page.

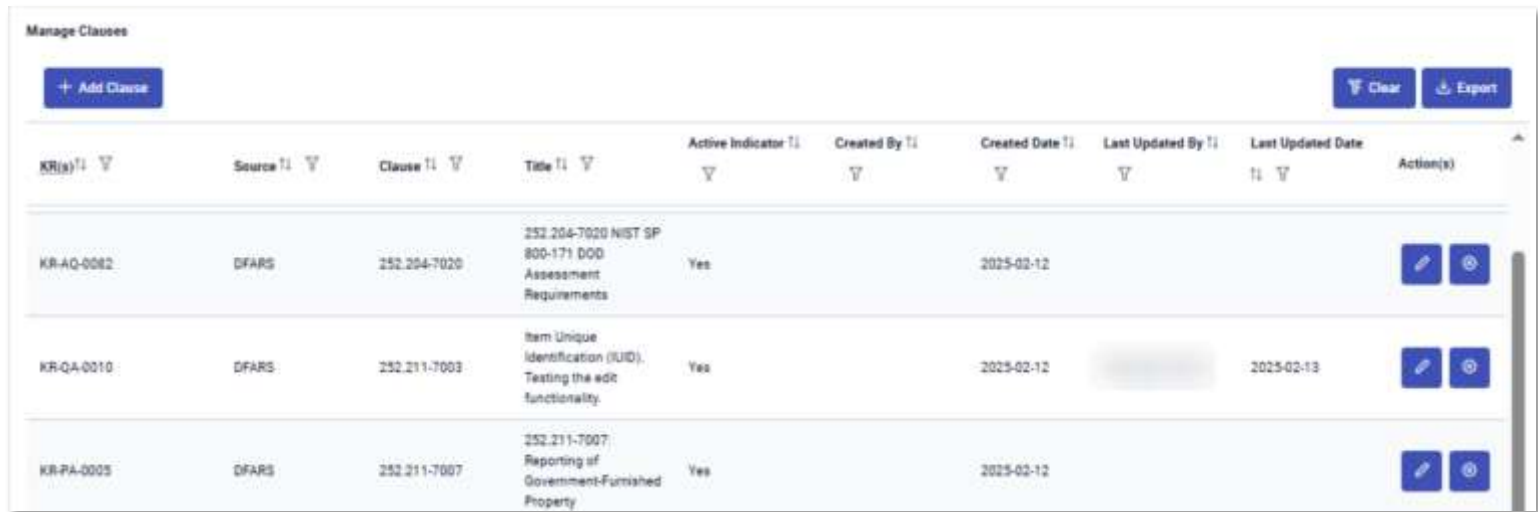
Manage Clauses Columns:

- KR(s)
- Source
- Clause
- Title
- Active Indicator
- Created By
- Created Date
- Last Updated By
- Last Updated Date
- Action(s)
 - [Edit Clause](#) (select to display the Edit Clause modal)
 - [Activate Clause](#) (select to display the Activate Clause confirmation message)
 - [Deactivate Clause](#) (select to display the Deactivate Clause confirmation message)

Buttons:

- [Add Clause](#) (select Add Clause to display the Add Clause modal)
- Clear (select Clear to remove all sorting and filters)
- Export (select Export to export the Clauses results to an Excel sheet)
- Back

NOTE: Columns are sortable and filterable.



+ Add Clause Clear Export									
KR(s) ⌵	Source ⌵	Clause ⌵	Title ⌵	Active Indicator ⌵	Created By ⌵	Created Date ⌵	Last Updated By ⌵	Last Updated Date ⌵	Action(s)
KR-AQ-0082	DFARS	252.204-7020	252.204-7020 NIST SP 800-171 DOD Assessment Requirements	Yes		2025-02-12			
KR-QA-0010	DFARS	252.211-7003	Item Unique Identification (IUID). Testing the edit functionality.	Yes		2025-02-12		2025-02-13	
KR-PA-0005	DFARS	252.211-7007	252.211-7007 Reporting of Government-Furnished Property	Yes		2025-02-12			

Add Clause

Select the **Add Clause** button to display the Add Clause modal. Enter in the applicable information and select **Submit** to add a new clause. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

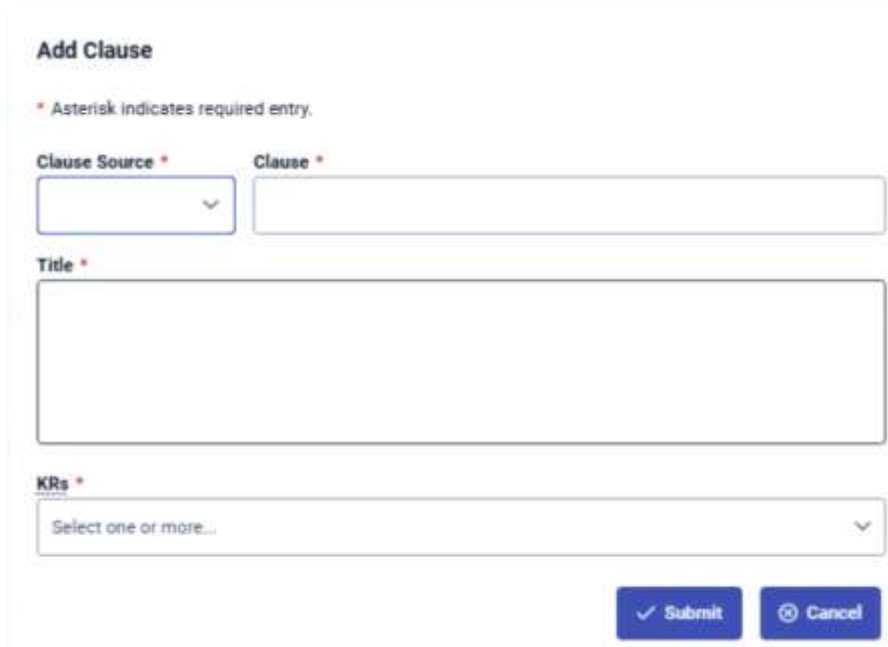
Add Clause Fields:

- Clause Source *
- Clause *
- Title *
- KRs *

Buttons:

- Submit (*select Submit to submit the new Clause*)
- Cancel

NOTE: When editing or adding a Clause, the entry must be unique.

The image shows a modal window titled "Add Clause". At the top, there is a note: "* Asterisk indicates required entry." Below this, there are four required fields: "Clause Source *" is a dropdown menu; "Clause *" is a text input field; "Title *" is a larger text input area; and "KRs *" is a dropdown menu with the placeholder text "Select one or more...". At the bottom right of the modal, there are two buttons: a blue "Submit" button with a checkmark icon and a blue "Cancel" button with a close icon.

Edit Clause

To edit a Clause, select the **Edit Clause** button within the Action(s) column. The Edit Clause modal displays. Enter the applicable information into the fields and select the **Submit** button to proceed. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Edit Clause Fields:

(fields are pre-populated)

- Clause Source *
- Clause *
- Title *
- KRs *

Buttons:

- Submit (*select Submit to submit the Clause edits*)
- Cancel

Edit Clause

* Asterisk indicates required entry.

Clause Source * Clause *

DFARS 252.215-7002

Title *

252.215-7002: Cost Estimating System Requirements

KRs *

KR-AQ-0017 - 252.215-7002: Cost Estimating System Requirements

✓ Submit ⓧ Cancel

Activate Clause

To activate a clause, select the **Activate Clause** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to activate Clause: [Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.

Activate Clause ×

Are you sure you want to activate Clause: 252.211-7007 - 252.211-7007: Reporting of Government-Furnished Property?

No Yes

Deactivate Clause

To deactivate a clause, select the **Deactivate Clause** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to Deactivate Clause: [Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.



Keywords

Selecting the Keywords option displays the **Manage Keywords** page.

Manage Keywords Columns:

- KR(s)
- Keyword
- Active Indicator
- Created By
- Created Date
- Last Updated By
- Last Updated Date
- Action(s)
 - [Edit Keyword](#) (select to display the Edit Keyword modal)
 - [Activate Keyword](#) (select to display the Activate Keyword confirmation message)
 - [Deactivate Keyword](#) (select to display the Deactivate Keyword confirmation message)

Buttons:

- [Add Keyword](#) (select Add Keyword to display the Add Keyword modal)
- Clear (select Clear to remove all sorting and filters)
- Export (select Export to export the Keywords results to an Excel sheet)
- Back

NOTE: Columns are sortable and filterable.

Manage Keywords

[+ Add Keyword](#) [Clear](#) [Export](#)

KR(s)	Keyword	Active Indicator	Created By	Created Date	Last Updated By	Last Updated Date	Action(s)
KR-AQ-0025	10 USC 2371	Yes		2025-02-19		2026-05-19	
KR-CS-0007	10 USC 2371	Yes		2025-02-19		2025-04-15	
KR-AQ-0025	10 USC 2371 and 10 USC 2371b	Yes		2025-02-19			

Add Keyword

Select the **Add Keyword** button to display the Add Keyword modal. Enter in the applicable information and select **Submit** to add a new keyword. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Add Keyword Fields:

- Keyword *
- KRs *

Buttons:

- Submit (*select Submit to submit the new Keyword*)
- Cancel

NOTE: When editing or adding a Keyword, it must be unique.

The screenshot shows a modal window titled "Add Keyword". At the top, there is a note: "* Asterisk indicates required entry." Below this, there are two input fields. The first is labeled "Keyword *" and is a text input field. The second is labeled "KRs *" and is a dropdown menu with the text "Select one or more..." and a downward arrow. At the bottom right of the modal, there are two buttons: a blue "Submit" button with a checkmark icon and a blue "Cancel" button with a circular arrow icon.

Edit Keyword

To edit a Keyword, select the **Edit Keyword** button within the Action(s) column. The Edit Keyword modal displays. Enter the applicable information into the fields and select the **Submit** button to proceed. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

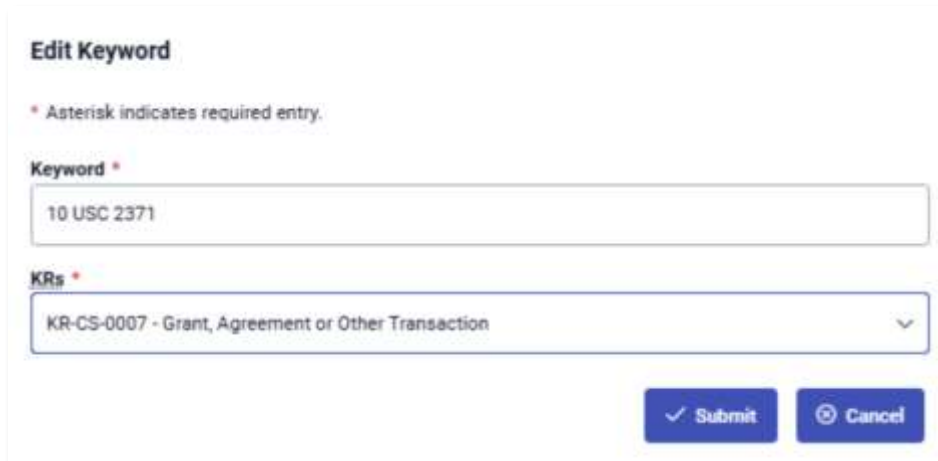
Edit Keyword Fields:

(fields are pre-populated)

- Keyword *
- KRs *

Buttons:

- Submit (*select Submit to submit the Keyword edits*)
- Cancel



Edit Keyword

* Asterisk indicates required entry.

Keyword *

10 USC 2371

KRs *

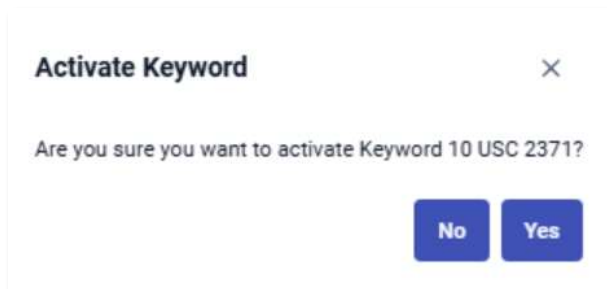
KR-CS-0007 - Grant, Agreement or Other Transaction

✓ Submit ↺ Cancel

Activate Keyword

To activate a Keyword, select the **Activate Keyword** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to activate Keyword: [Contract Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed.

Selecting **Yes** displays a success message.



Activate Keyword ×

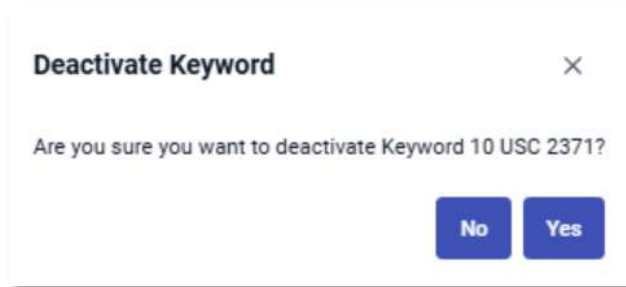
Are you sure you want to activate Keyword 10 USC 2371?

No Yes

Deactivate Keyword

To deactivate a Keyword, select the **Deactivate Keyword** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to Keyword: [Contract Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed.

Selecting **Yes** displays a success message.



Post Award Orientation Recommendations

Selecting the Post Award Orientation Recommendations option displays the **Manage Post Award Orientation Recommendations** page.

Manage Post Award Orientation Recommendations Columns:

- Description
- Active Indicator
- Created By
- Created Date
- Last Updated By
- Last Updated Date
- Action(s) (*if Other is the selected Description, the Actions column is blank*)
 - [Edit Post Award Orientation Recommendation](#) (*select to display the Edit Post Award Orientation Recommendations modal*)
 - [Activate Post Award Orientation Recommendation](#) (*select to display the Activate Post Award Orientation Recommendation confirmation message*)
 - [Deactivate Post Award Orientation Recommendation](#) (*select to display the Deactivate Post Award Orientation Recommendation confirmation message*)

NOTE: There is only one **Other** Post Award Orientation Recommendation allowed at a time. If Other is the selected description type for the Post Award Orientation Recommendation, edits or deactivation is not allowed.

NOTE: If an **Other** Post Award Recommendation already exists, an error displays when trying to create another.

Buttons:

- [Add Post Award Orientation Recommendation](#) (*select Add Post Award Orientation Recommendation to display the Add Post Award Orientation Recommendation modal*)
- Clear (*select Clear to remove all sorting and filters*)
- Export (*select Export to export the Post Award Orientation Recommendation results to an Excel sheet*)
- Back

NOTE: Columns are sortable and filterable.

Manage Post Award Orientation Recommendations

+ Add Post Award Orientation Recommendation

Clear

Export

Description 	Active Indicator 	Created By 	Created Date 	Last Updated By 	Last Updated Date 	Action(s)
ZZZ Test 5	No		2025-05-15		2025-08-29	
JITC test 20083	Yes		2024-12-11		2025-08-29	 
Air Launch and Recovery Equipment-CSI (QA Only)	Yes		2024-12-11		2025-08-29	 

Add Post Award Orientation Recommendation

Select the **Add Post Award Orientation Recommendation** button to display the Add Post Award Orientation Recommendation modal. Enter the applicable information and select **Submit** to add a new Post Award Orientation Recommendation. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Add Post Award Orientation Recommendation Fields:

- Description *

Buttons:

- Submit (select Submit to submit the new Post Award Recommendation)
- Cancel

The screenshot shows a modal window titled "Add Post Award Orientation Recommendation". Below the title is a note: "* Asterisk indicates required entry." There is a text input field labeled "Description *". At the bottom right of the modal are two buttons: "Submit" (with a checkmark icon) and "Cancel" (with a close icon).

Edit Post Award Orientation Recommendation

To edit the Post Award Orientation Recommendation, select the **Edit Post Award Orientation Recommendation** button. The Edit Post Award Orientation Recommendation modal displays. Enter in the desired changes and select the **Submit** button to proceed. A success message displays. Alternatively, select **Cancel** to return to the previous screen.

Edit Post Award Orientation Recommendation Fields:

(field is pre-populated)

- Description *

Buttons:

- Submit (*select Submit to submit the Post Award Recommendation edits*)
- Cancel

NOTE: The Edit Post Award Orientation Recommendations fields are pre-populated with information entered when the Post Award Orientation Recommendation was originally added or when it was last updated.

Edit Post Award Orientation Recommendation

* Asterisk indicates required entry.

Description *

Arms, Ammunition & Explosives (QA Only)

✓ Submit ⓧ Cancel

Activate Post Award Orientation Recommendation

To activate a Post Award Orientation Recommendation, select the **Activate Post Award Orientation** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to activate Post Award Orientation Recommendation: [Contract Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.

Activate Post Award Orientation Recommendation ✕

Are you sure you want to activate Post Award Orientation Recommendation: Certifications (Personnel or Material)?

No Yes

Deactivate Post Award Orientation Recommendation

To deactivate a Post Award Orientation Recommendation, select the **Deactivate Post Award Orientation** button under the Action(s) column. A confirmation message displays stating, "Are you sure you want to deactivate Post Award Orientation Recommendation: [Contract Requirement]?" Select **No** to return to the previous screen or **Yes** to proceed. Selecting **Yes** displays a success message.

Deactivate Post Award Orientation Recommendation



Are you sure you want to deactivate Post Award Orientation Recommendation: Certifications (Personnel or Material)?

No

Yes