



# PI Fund Reporting tool – PI View

## TOUR AND NAVIGATION TIPS

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# PSOM PI Fund Reporting dashboard

## Purpose

Dashboard of the status of funds, starting with grants by primary investigators. **Departmental summaries for business administrators. Replaces the manual, error-prone process in which each department manually generates individual reports.**

## Audience

- Principal Investigators
- Departmental leadership

## Content

- Funds overview
- Individual fund summary and detailed transaction data
- Personnel summary
- Proposals Pending
- **In the future, faculty sign off for compliance purposes**
- **BA View – metrics and flags**
- **Hosted on Penn Medicine platform using UPHS account login**

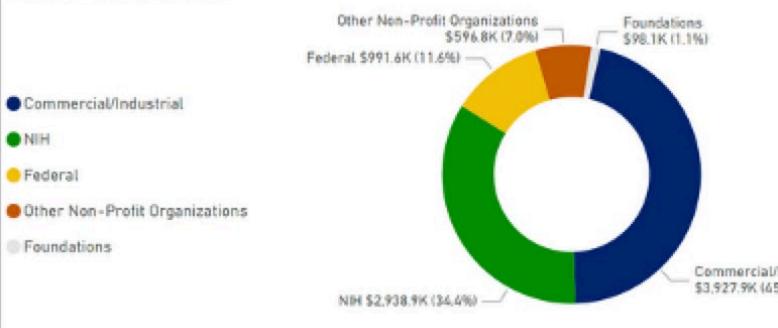
## PORTFOLIO OVERVIEW

Pending FCOI	Expiring Within 90 Days
0	0

### Active Funds (12)

Fund	Primary PI	Sponsor	Description	Acct Start
585207	[REDACTED]	CSL BEHRING	CSL BEHRING	06/20/2018
568283	[REDACTED]	REGENERON PHARMACEUTICALS, INC.	N/A	12/23/2018
585918	[REDACTED]	CALICO, LLC	23-050859	08/22/2018
587040	[REDACTED]	NEWAMSTERDAM PHARMA B.V.	IIS - Rader	03/09/2018
500901	[REDACTED]	NATIONAL INSTITUTE OF DIABETES AND DIGESTIVE AND KIDNEY DISEASES/NIH/DHHS	5-K99-OK-137029-02	08/06/2018
502613	[REDACTED]	NATIONAL CENTER FOR ADVANCED TREATMENT	5-UL1-TR-001878-10	06/01/2018

### Total Awarded by Sponsor Type



# PI View Login

Go to DSA Website PI fund reporting and click on the link for the PI Reporting tool

*Tip: Bookmark the dashboard after logging in*

*Login using your UPHS login id and Password*

*Tip: Save login id and password when prompted*

- *To reset your password, call 215-662-7474*

If you encounter any problems logging into your Penn Medicine/UPHS account, submit a service ticket @ UPHS IT self service:

(<https://uphsnet.uphs.upenn.edu/athenaselfservice/> )

and add Jassem, Rawa and Meaney, Lynn as 'Watchers'

# Portfolio Overview – *default landing page for faculty*

The screenshot shows the Penn Medicine PI Fund Reporting interface. The top navigation bar includes the Penn Medicine logo, 'PI Fund Reporting', 'Data updated 10/14/25', a search bar, and user icons. The left sidebar lists navigation options: PSOM Fund Reporting, PI Fund Reporting, Portfolio Overview, Fund Summary, Active Lab Personnel, Proposals Pending, Expired/Overdraft Funds, and Questions and Feedback... A 'Go back' button is at the bottom of the sidebar. The main content area is titled 'PORTFOLIO OVERVIEW Beta Version'. It features a summary table with counts for Pending FCOI (0), Expiring Within 90 Days (1), Expired Not Closed (0), Funds in Overdraft (0), and Pending Proposals (3). Below this is a table titled 'Active Funds (17)' with columns for Fund, Primary PI, Sponsor, Description, Acct Start, Current Budget End, Award, Total Budget, Expenses Total, Outstanding Encumbrances, Balance Available, Expiring Within 90 Days, Advance Acct, Active Clinical Trials, and FCOI. A large chart titled 'Total Awarded by Sponsor Type' shows the distribution of awards by sponsor type. A bar chart titled 'Expenses Plus Encumbrances and Balance Available by Fund Desc' shows the total committed amount for various funds. The bottom right corner shows a zoom control at 54%.

# Portfolio Overview

PSOM Fund Reporting

For Business Administrators

For Principal Investigators

Portfolio Overview

Fund Summary

Fund Detail

Proposals Pending

Active Lab Personnel

Expired/Overdraft Funds

Grants Pending FCOI

Questions and Feedback...

About This Dashboard

**PORTFOLIO OVERVIEW** Beta Version

As of Accounting Period: JAN-26

The system may be unavailable daily before 10 a.m. and after 4 p.m. due to maintenance.

Pi Subaccount  
V [REDACTED] All

Pending FCOI: 1

Expiring Within 90 Days: 1

Expired Not Closed: 3

Expired < 3 Months Funds in Overdraft: -

Pending Proposals: 2

**Active Funds (17)**

Fund	Primary PI	Sponsor	Description	Acct Start	Current Budget End	Acct End	Award	Total Budget	Expenses Total Project to Date	Outstanding Encumbrances	Bal. Avail.	Direct Bal. Avail.	Expiring Within 90 Days	Adv. Acct	Cost Share	Clinical Trials	

List of all Active funds with summary information including up-to-date financials

Chart: Total Committed (\$)

Legend: Expenditures Plus Encumbered (Green), Total Budget (Green)

Period	Expenditures Plus Encumbered	Total Budget	Change (%)
5-03	\$7,080,230	\$7,080,230	+13%
5-14	\$4,399,610	\$4,399,610	(8.04%)
5-10	\$1,742,830	\$1,742,830	(56.11%)
2-26	\$415,175	\$415,175	(26.70%)

Chart: Fund Type

Legend: NIH (Green), Universities (Yellow), Other Non-Profit Organizations (Purple)

Universities \$1,369.0K (9.6%)

NIH \$12,826.3K (90.2%)

# Fund Summary page

FUND SUMMARY [?](#)

(Blank)

Please select a fund the first time you use this dashboard or if you reset your filters.

Fund #	Desc	Institution #	Primary PI	Project Title	Sponsor	Sponsor Type	Acct Start	Current Budget End	Acct End	Fun Org

% Direct Bu

0%

Acct #   [Regulatory Protocols](#)   [Award Increments](#)

CNAC-ORG-BC-FUND-OBJECT-PROGRAM-CREF

Account #	CREF/Subaccount	Wayward Expense

Fund Summary

Expense C

Total

As of Accounting Period:

PI:  Subaccount:  Fund:

All

Close

Search:

000815 Am...

UTE ON AGING... 4-AG-0524...

001006 Am...

RSITY 017543-07)

Page is empty until a Fund is selected from list

After choosing a Fund from the list, Hit the Close button at the top of the list

# Lab Personnel

## ACTIVE LAB PERSONNEL

**ACTIVE LAB PERSONNEL**

PI      Labs      Fiscal Year

PI % of Payments by Fiscal YTD and Fund Source

PI	Fiscal Year to-Date	General Unrestricted	Grants	Total
	2026	28.68%	71.32%	100.00%

Right click on a name to drill through to payment detail.

PI payment information – no salary or payment information shown

Lab Personnel Payments by Fiscal YTD and Fund Source

Name	Salary	Salary Type	General Unrestricted		Grants		Total	
			Payment Amt	%	Payment Amt	%	Payment Amt	%
			\$13,617.21	100.00%	\$13,617.21	100.00%		
	\$0	0.00%	\$13,617.21	100.00%	\$13,617.21	100.00%		
			\$16,830	100.00%	\$16,830	100.00%		
	\$0	0.00%	\$16,830	100.00%	\$16,830	100.00%		
			\$14,202.91	74.24%	\$14,202.91	74.24%		
	\$4,927.55	25.76%	\$4,927.55	25.76%				

Right click on Name and choose Drill Through - 'Lab personnel detail' to see more information

list of people in lab (according to Workday) with total payment by source type and salary info

Graduate Student Payments Fiscal YTD on Active Funds and CREF

Name	Job Profile Name	Supervisory Org	Posted Org	Posted Coa Fund	Obj	Posted Program	Posted CREF	Payment Amt	Fiscal Year
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List of Current Graduate students (according to Banner) with total payment and funding source

Lab Personnel Payments by Fiscal YTD and Fund Source



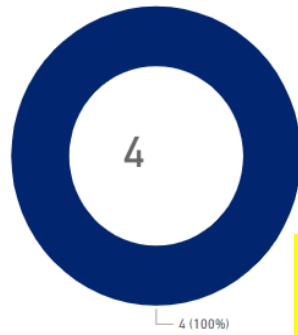
- Grants
- General Unrestrict...

Grants  
\$49,577.67 (100.00%)

# Pending Proposals

## PROPOSALS PENDING

Proposals Pending by Proposal Type and Fiscal Year



PI

Proposal Type

Fiscal Year

All

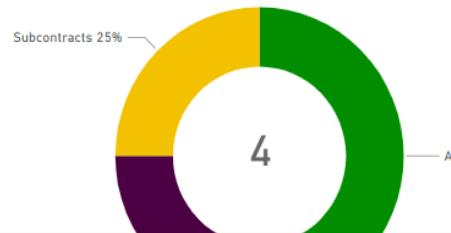
2026

Select all

2026

2025

Proposals Pending by Sponsor Type



Proposals Pending

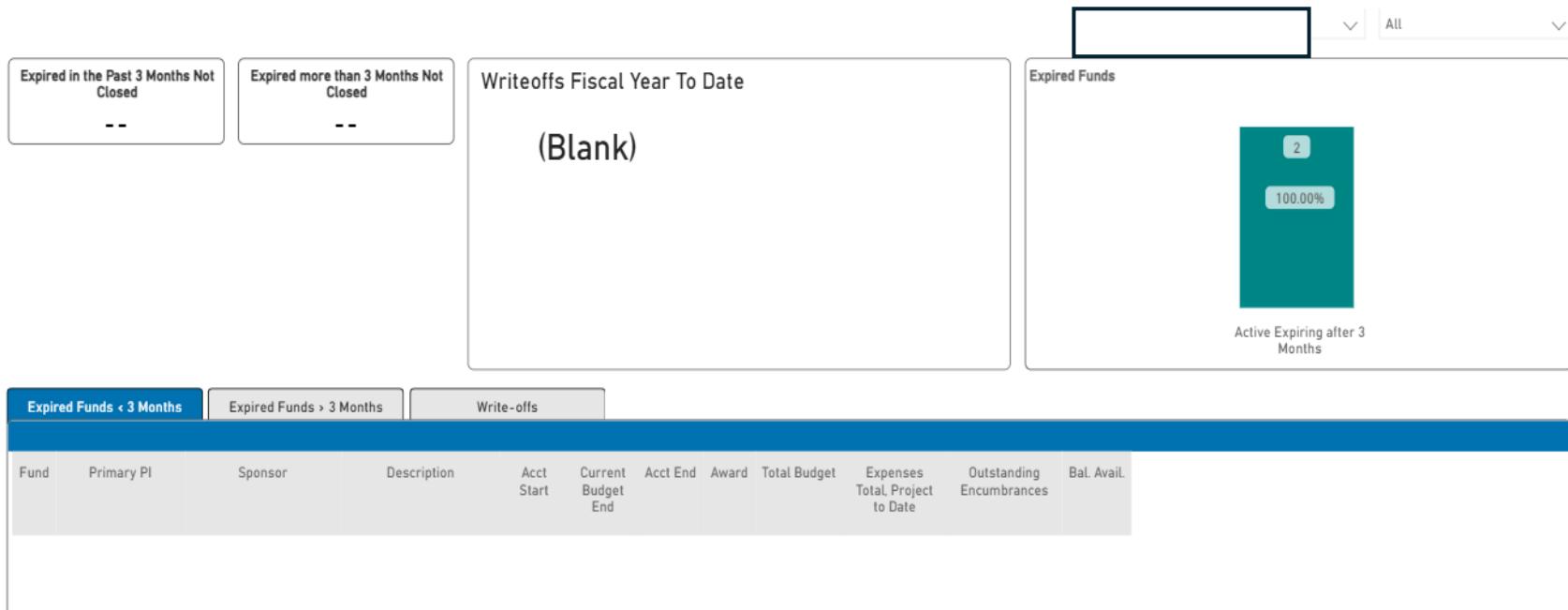
Institution # Sponsor Desc Fiscal Year Proposal Type In

List includes proposals submitted since July 1 of previous fiscal year.

Does not include proposals that have been awarded or are pending FCOI

	Pending	7/22/2025	3/1/2026	2/28/2027	Subcontracts
Pending	9/10/2025	4/1/2026	3/31/2027	Other Federal	
Pending	9/17/2025	7/1/2026	6/30/2027	All Other	
Pending	10/21/2025	7/1/2026	6/30/2027	All Other	

# Expired (not Closed) Funds/Writeoffs



# Grants Pending FCOI

Count of Grants Pending FCOI

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All

▼

Awards Pending FCOI By Resp Org													
Org Desc	INST #	Award Fund	Current Prime Fund	PI	Original Award ID	Period Start	Award Date	Status Recorded Date	Period #	Status	Direct Costs	F&A	Total