



Penn Medicine

# 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

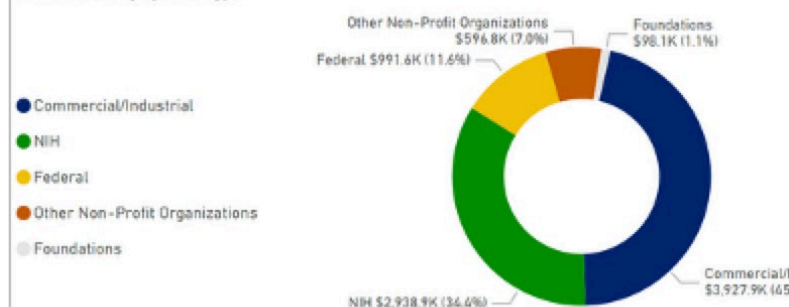


Pending FCOI	Expiring Within 90 Days
0	0

### Active Funds (12)

Fund	Primary PI	Sponsor	Description	Acct Start
585207		CSL BEHRING	CSL BEHRING	06/20/
548283		REGENERON PHARMACEUTICALS, INC.	N/A	12/23/
585918		CALICO, LLC	23-050859	08/22/
587040		NEWAMSTERDAM PHARMA B.V.	IIS - Rader	03/09/
500901		NATIONAL INSTITUTE OF DIABETES AND DIGESTIVE AND KIDNEY DISEASES/NIH/DHHS	5-K99-DK-137029-02	08/06/
502613		NATIONAL CENTER FOR ADVANCING TRANSLATIONAL	5-UL1-TR-001878-10	06/01/

### 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*

Penn Medicine
PI Fund Reporting
Data updated 10/14/25

...

File
Print
Undo
Redo
Refresh
...

PSOM Fund Reporting

PI Fund Reporting

Portfolio Overview

Fund Summary

Active Lab Personnel

Proposals Pending

Expired/Overdraft Funds

Questions and Feedback...

PORTFOLIO OVERVIEW Beta Version

Subaccount

As of Accounting Period: SEP-25

Pending FDOI

0

Expiring Within 90 Days

1

Expired Not Closed

0

Funds in Overdraft

0

Pending Proposals

3

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	Balance Available	Expiring Within 90 Days	Advance Acct	Active Clinical Trials	FDOI
5000															
5020															
5022															
5023															

Total Awarded by Sponsor Type

Centers \$453.9K (5.3%)

Universities \$401.7K (4.6%)

NIH \$4,048.3K (31.1%)

Foundations \$2,317.5K (17.8%)

Other Non-Profit Organizations \$2,468.8K (19.0%)

Commercial/Industrial \$2,901.6K (22.3%)

Expenses Plus Encumbrances and Balance Available by Fund Desc

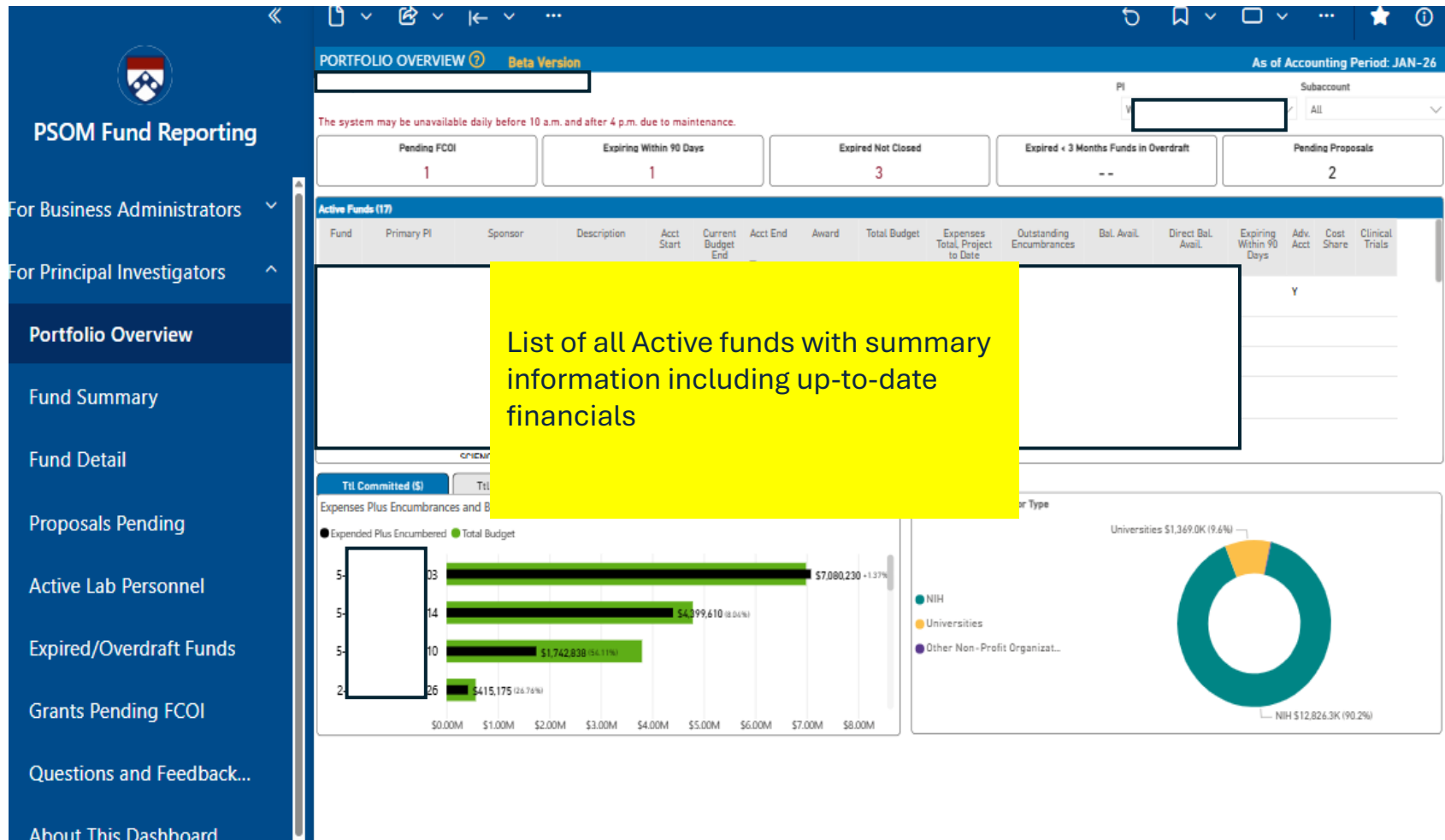
Expended Plus Encumbered

Total Budget

Go back

54%

# Portfolio Overview



# Fund Summary page

FUND SUMMARY ⓘ

As of Accounting Period:

(Blank)

PI

Subaccount

Fund

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	Fund Org	Close
											Search
											000815 Am...
											UTE ON AGING/... 4-AG-0524...
											G/... 5...
											9
											001006 Ame...
											RSITY (17543-07)

% Direct Bu

0%

Acct #

Regulatory Protocols

Award Increments

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

Account #

CREF/Subaccount

Wayward Expense

Fund Summ

Expense C

Total

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

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	Job Profile	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%	\$13,617.21	100.00%
						\$16,830	100.00%	\$16,830	100.00%
	\$0	0.00%		\$16,830	100.00%	\$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

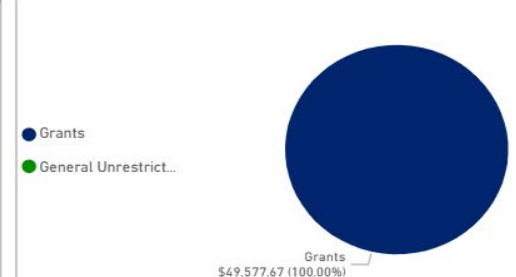
list of people in lab (according to Workday) with total payment by source type and salary info

### 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



# Pending Proposals

## PROPOSALS PENDING

PI

Proposal Type

Fiscal Year

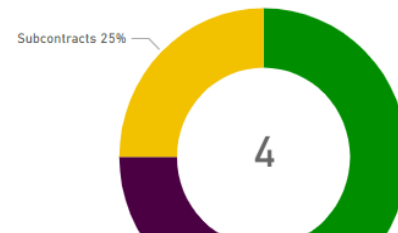


Proposals Pending by Proposal Type and Fiscal Year



Proposal Type  
● New Project

Proposals Pending by Sponsor Type



2026  
☐ Select all  
☒ 2026  
☐ 2025

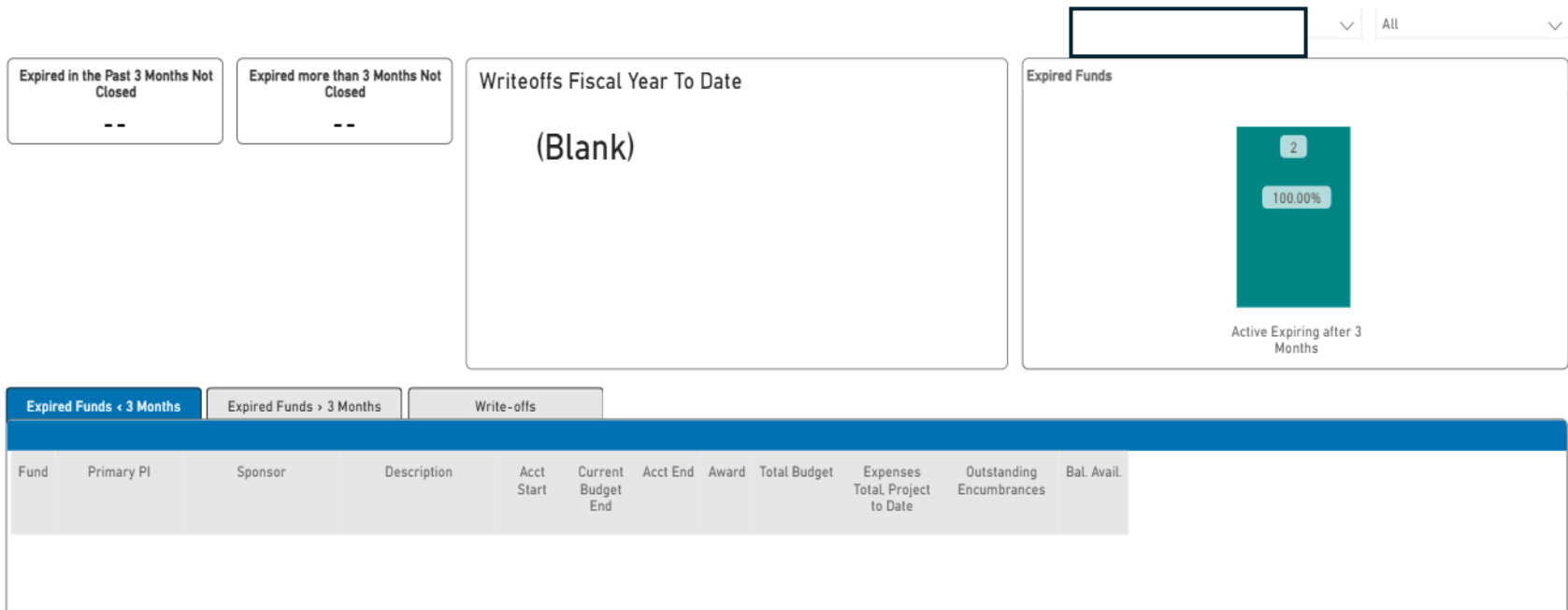
List includes proposals submitted since July 1 of previous fiscal year.  
Does not include proposals that have been awarded or are pending FCOI

### Proposals Pending

Institution #	Sponsor Desc	Fiscal Year	Proposal Type	Institution
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
	▲												