



Penn Medicine

PI Fund Reporting tool – BA View

TOUR AND NAVIGATION TIPS

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PSOM PI Fund Reporting

Purpose

Dashboard that shows the status of a PI's research portfolio.
Replaces the manual, error-prone process in which each department manually generates individual reports out of Business Objects and distributes to PIs.

Audience

- Principal Investigators
- Departmental Leadership and Administrators

Content

PI View:

- 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

PORTFOLIO OVERVIEW



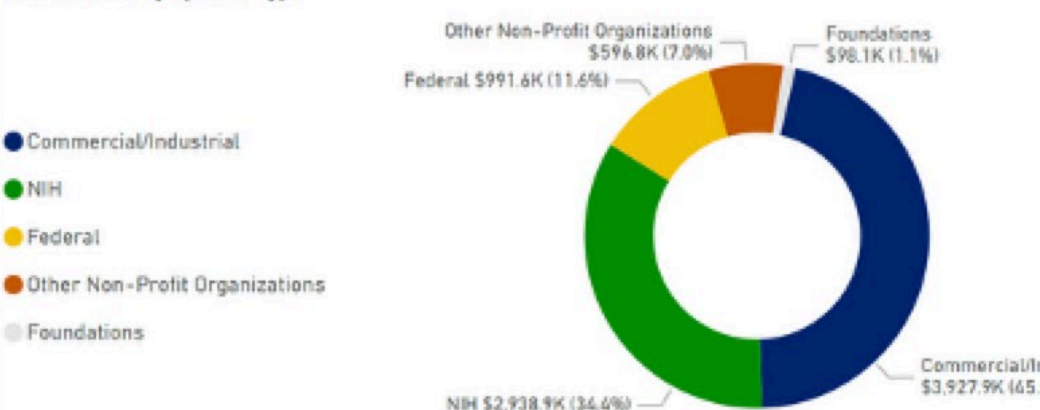
Pending FCOI
0

Expiring Within 90 Days
0

Active Funds (12)

Fund	Primary PI	Sponsor	Description	Acct Start
585207		CSL BEHRING	CSL BEHRING	06/20/
568283		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 TRANSIST ATIONAL	5-UL1-TR-001878-10	06/01/

Total Awarded by Sponsor Type



Login and Access – BA View

Administrator access to BA View

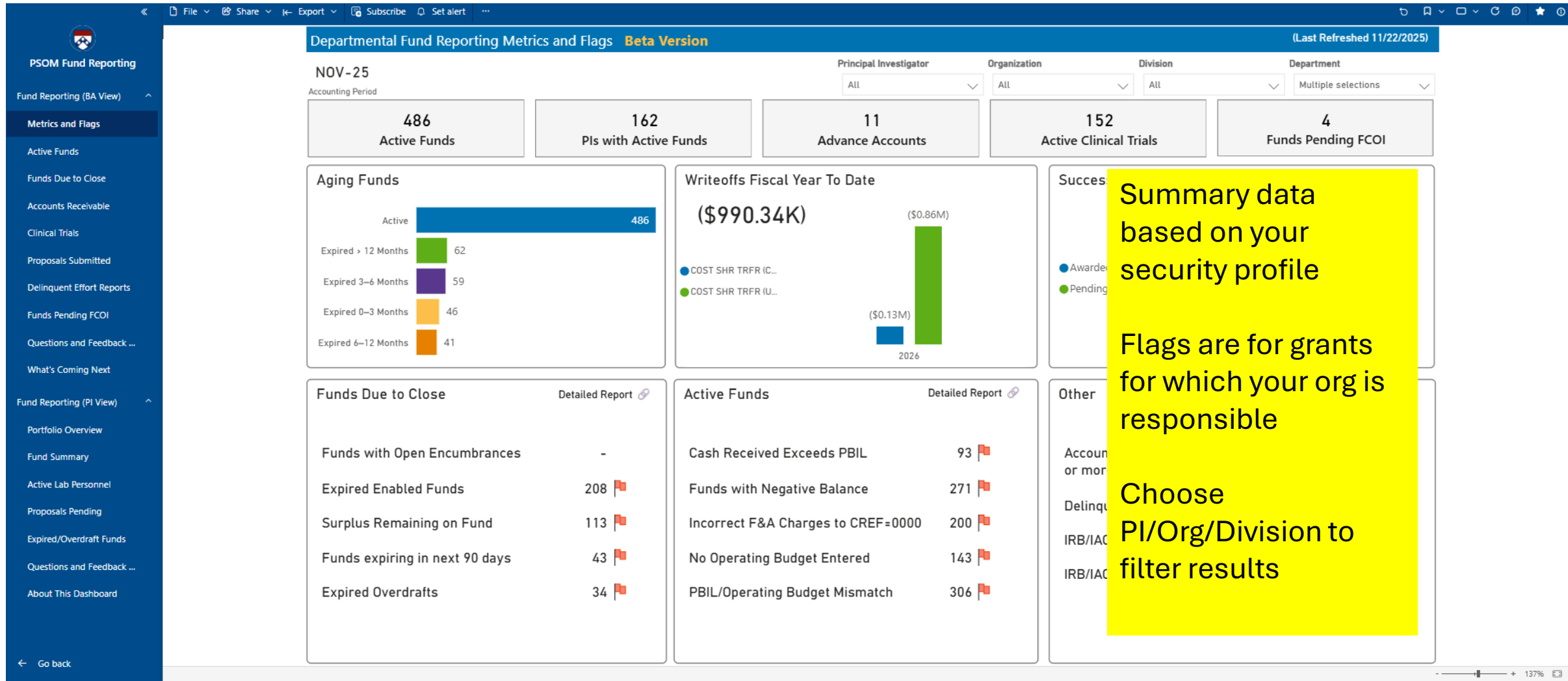
- To access the BA View of the dashboard, you must be given access for a department or org
- ~ 400 administrators and leaders have been given access
- Contact Lynn Meaney regarding access (meaney@upenn.edu)
- **Whose grants will you see?** List of PIs based on access to PI Home org or Resp Org of individual grants
- Metrics and Flags on BA View
 - Resp org based – if you have access to the resp org that is responsible for the grant, then you will see the grant and flags

Login for BA View

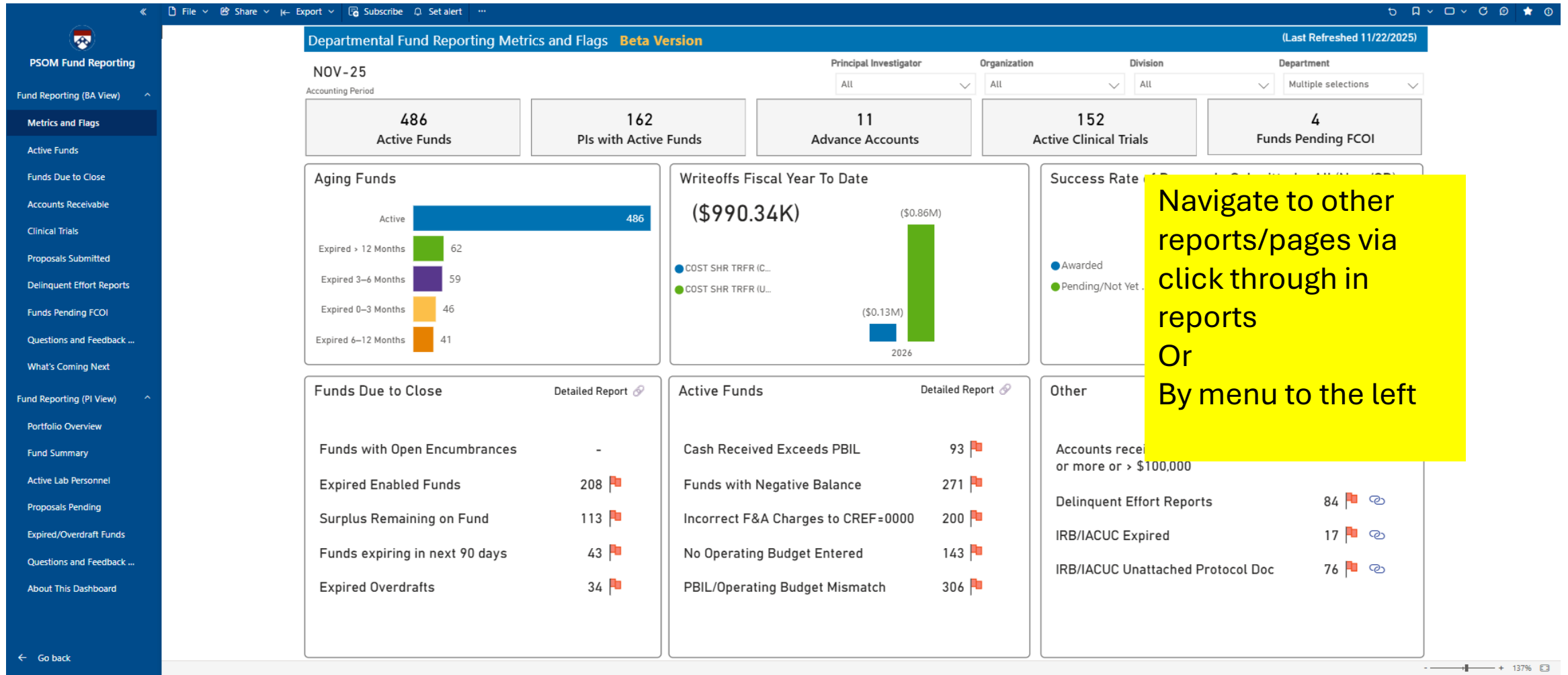
Go to [PI funding reporting link](#) and click on the link for the PI Reporting tool (Tip: Bookmark the dashboard after logging in)

- *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 account (after resetting your password), Submit a service ticket @ UPHS IT self service:
(<https://uphsnet.uphs.upenn.edu/athenaselfservice/>).
and add Jassem,Rawa and Meaney,Lynn as ‘Watchers’*

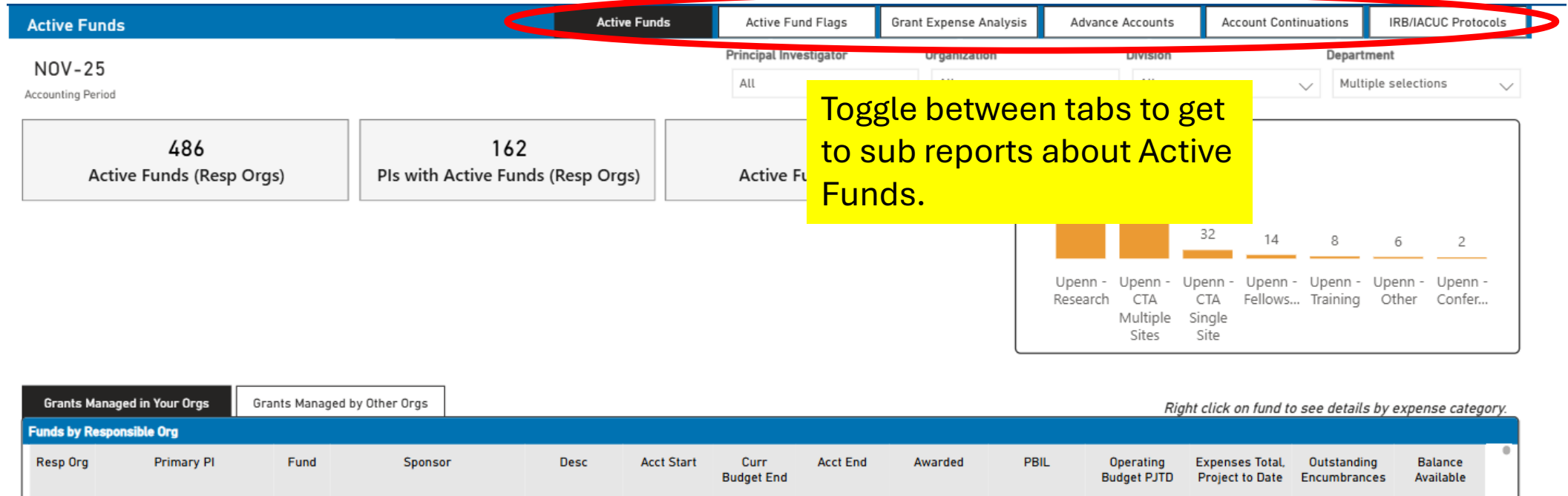
Metrics and Flags – *default landing page for Department leadership/administrators*



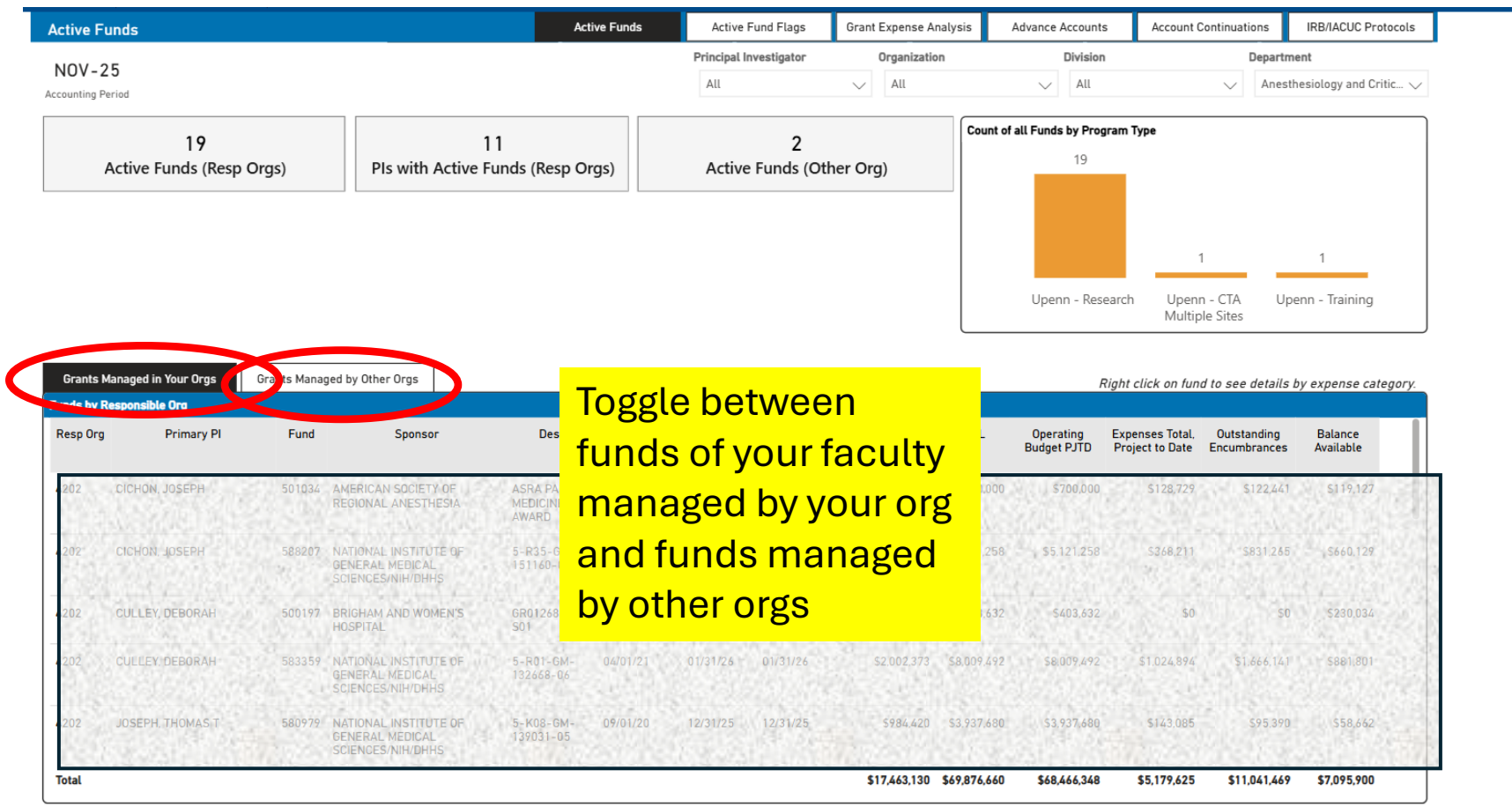
Metrics and Flags



Active funds



Active funds



Funds due to close

The screenshot shows a dashboard titled 'Expiring/Expired Funds'. At the top, there are two tabs: 'Funds Due to Close' and 'Expired/Cost Share/Write-offs'. The 'Funds Due to Close' tab is selected and circled in red. Below the tabs, there are four filters: 'Principal Investigator' (set to 'All'), 'Organization' (set to 'All'), 'Division' (set to 'All'), and 'Department' (set to 'Multiple selections'). Below these filters are four summary boxes: '88 Funds Expired < 3 Months', '208 Expired Enabled Funds', '46 Funds Expired < 3 Months', and '162 Funds Expired > 3 Months'. Below the summary boxes are three tabs: 'Funds Expiring in 3 Months', 'Funds Expired < 3 Months', and 'Funds Expired > 3 Months'. The 'Funds Expiring in 3 Months' tab is selected and circled in red. A yellow callout box points to these tabs with the text: 'Choose among tabs to get lists of grants that have or will expire'. Below the tabs is a table with the following columns: Resp Org, Fund, PI_NAME, Sponsor, Desc, Rpt Code, Last Report Due Date, Acct End, Freeze Date, PBIL, Total Reported (FSRD + FSRI), Grant Expenditures, Surplus/Deficit, Revenue, Cash Position, Cash Received, and Enc.

Expiring/Expired Funds

NOV-25
Accounting Period

Principal Investigator: All
Organization: All
Division: All
Department: Multiple selections

88 Funds Expired < 3 Months
208 Expired Enabled Funds
46 Funds Expired < 3 Months
162 Funds Expired > 3 Months

Funds Expiring in 3 Months | Funds Expired < 3 Months | Funds Expired > 3 Months

Funds Expiring in 3 Months

Resp Org	Fund	PI_NAME	Sponsor	Desc	Rpt Code	Last Report Due Date	Acct End	Freeze Date	PBIL	Total Reported (FSRD + FSRI)	Grant Expenditures	Surplus/Deficit	Revenue	Cash Position	Cash Received	Enc
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Accounts Receivable

Reports of all current Accounts Receivable (billing)

Accounts Receivable

JAN-26

Accounting Period

Fund

All

Principal Investigator

All

Organization

All

Division

All

Department

Multiple selections

39

Expired Funds

745

Funds

745

Funds/Outstanding Invoices

77

Invoices/Outstanding Balance

\$28,444,328.01

Total Invoices Outstanding

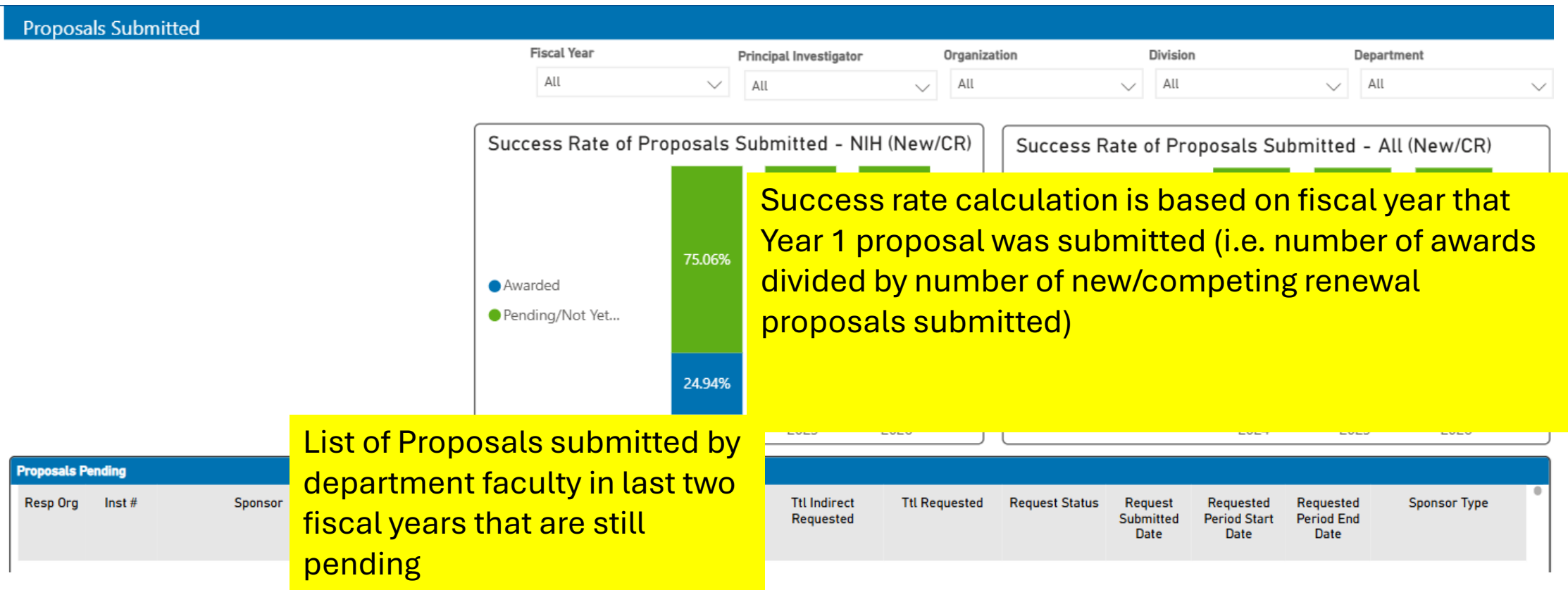
Accounts Receivable

Aging of Receivables

Invoices - Detail

Accounts Receivable

Proposals Submitted



Delinquent effort reports

Delinquent Effort Reports

Organization

Division

Department

All

All

All

Delinquent effort reports are updated quarterly.

Delinquent Effort Forms

Pending Administrative Review

150

Pending Faculty Certification

320

Total Delinquent

470

Delinquent Effort Reports by Resp Org

Org	Employee Name	Pending Status	Reporting Period	Reviewer	Quarterly Update Date
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Grants pending FCOI

Awards Pending FCOI Submission and Review

50

Count of Grants Pending FCOI

Organization

Division

Department

All

All

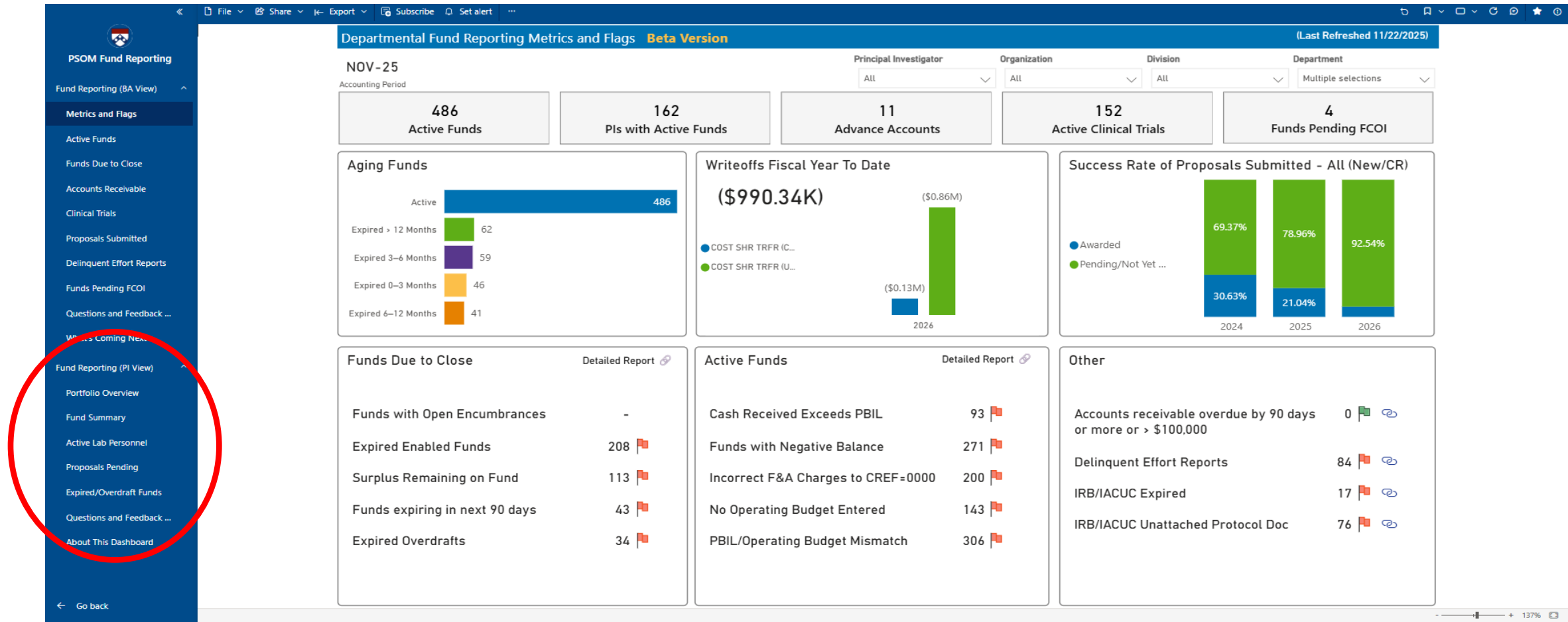
All

Awards Pending FCOI By Resp Org

Prop 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
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Grants in Pending FCOI status cannot be active funds until submission of FCOI by PI

Choose PI View from Menu to see more detail about a specific faculty member's grant portfolio and other information.



Portfolio Overview – *default landing page for faculty*

