

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



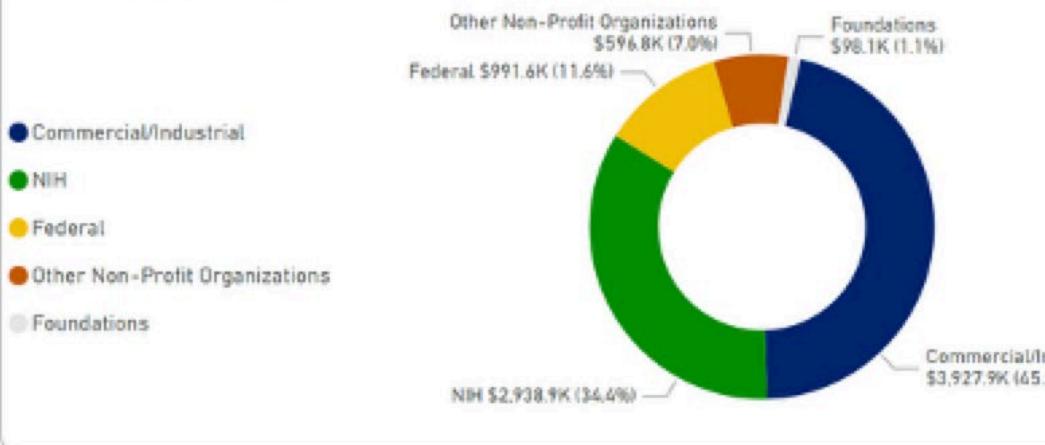
Pending FCOI
0

Expiring Within 90 Days
0

Active Funds (12)

Fund	Primary PI	Sponsor	Description	Acct Start
585207		CSL BEHRING	CSL BEHRING	06/20/2023
568283		REGENERON PHARMACEUTICALS, INC.	N/A	12/23/2023
585918		CALICO, LLC	23-050859	08/22/2023
587040		NEWAMSTERDAM PHARMA B.V.	IIS - Rader	03/09/2023
500901		NATIONAL INSTITUTE OF DIABETES AND DIGESTIVE AND KIDNEY DISEASES/NIH/DHHS	5-K99-DK-137029-02	08/06/2023
502613		NATIONAL CENTER FOR ADVANCED TRAINING AT&T	5-UL1-TR-001878-10	06/01/2023

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*

PSOM Fund Reporting

File Share Export Subscribe Set alert ...

Departmental Fund Reporting Metrics and Flags **Beta Version** (Last Refreshed 11/22/2025)

NOV-25 Accounting Period

Principal Investigator Organization Division Department

All All All Multiple selections

Category	Value
Active Funds	486
PIs with Active Funds	162
Advance Accounts	11
Active Clinical Trials	152
Funds Pending FCOI	4

Aging Funds

Category	Count
Active	486
Expired > 12 Months	62
Expired 3-6 Months	59
Expired 0-3 Months	46
Expired 6-12 Months	41

Writeoffs Fiscal Year To Date

Category	Value
(\$990.34K)	(\$0.86M)
COST SHR TRFR (C...	(\$0.13M)
COST SHR TRFR (U...	2026

Success

Summary data based on your security profile

Funds Due to Close

Category	Count
Funds with Open Encumbrances	-
Expired Enabled Funds	208
Surplus Remaining on Fund	113
Funds expiring in next 90 days	43
Expired Overdrafts	34

Active Funds

Category	Count
Cash Received Exceeds PBIL	93
Funds with Negative Balance	271
Incorrect F&A Charges to CREF=0000	200
No Operating Budget Entered	143
PBIL/Operating Budget Mismatch	306

Other

Flags are for grants for which your org is responsible

Choose PI/Org/Division to filter results

Go back

Scalability, 2025

137%

Metrics and Flags

PSOM Fund Reporting

Fund Reporting (BA View)

Metrics and Flags

Active Funds

Funds Due to Close

Accounts Receivable

Clinical Trials

Proposals Submitted

Delinquent Effort Reports

Funds Pending FCOI

Questions and Feedback ...

What's Coming Next

Fund Reporting (PI View)

Portfolio Overview

Fund Summary

Active Lab Personnel

Proposals Pending

Expired/Overdraft Funds

Questions and Feedback ...

About This Dashboard

Go back

File Share Export Subscribe Set alert ...

Departmental Fund Reporting Metrics and Flags **Beta Version**

(Last Refreshed 11/22/2025)

NOV-25 Accounting Period

Principal Investigator Organization Division Department

All All All Multiple selections

486 Active Funds 162 PIs with Active Funds 11 Advance Accounts 152 Active Clinical Trials 4 Funds Pending FCOI

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Writeoffs Fiscal Year To Date

(\$990.34K) (\$0.86M) (\$0.13M) 2026

COST SHR TRFR (C...) COST SHR TRFR (U... Awarded Pending/Not Yet ...

Success Rate 100% (152 Active Clinical Trials)

Funds Due to Close

Detailed Report

Funds with Open Encumbrances -

Expired Enabled Funds 208

Surplus Remaining on Fund 113

Funds expiring in next 90 days 43

Expired Overdrafts 34

Active Funds

Detailed Report

Cash Received Exceeds PBIL 93

Funds with Negative Balance 271

Incorrect F&A Charges to CREF=0000 200

No Operating Budget Entered 143

PBIL/Operating Budget Mismatch 306

Other

Accounts receivable or more or > \$100,000

Delinquent Effort Reports 84

IRB/IACUC Expired 17

IRB/IACUC Unattached Protocol Doc 76

Navigate to other reports/pages via click through in reports
Or
By menu to the left

Active funds

Active Funds

NOV-25

Accounting Period

486 Active Funds (Resp Orgs)

162 PIs with Active Funds (Resp Orgs)

Active Funds

Principal Investigator

Organization

Division

Department

All

Toggle between tabs to get to sub reports about Active Funds.

32
Upenn - Research
Multiple Sites

14
Upenn - CTA
Single Site

8
Upenn - Fellows...
Training

6
Upenn - Other

2
Upenn - Confer...

Grants Managed in Your Orgs Grants Managed by Other Orgs

Right click on fund to see details by expense category.

Funds by Responsible Org

Resp Org	Primary PI	Fund	Sponsor	Desc	Acct Start	Curr Budget End	Acct End	Awarded	PBIL	Operating Budget PJTD	Expenses Total, Project to Date	Outstanding Encumbrances	Balance Available
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Active funds

Active Funds Active Funds Active Fund Flags Grant Expense Analysis Advance Accounts Account Continuations IRB/IACUC Protocols

NOV-25 Accounting Period

Principal Investigator Organization Division Department

All All All Anesthesiology and Critic...

19 Active Funds (Resp Orgs) 11 PIs with Active Funds (Resp Orgs) 2 Active Funds (Other Org)

Count of all Funds by Program Type

19
Upenn - Research
1
Upenn - CTA Multiple Sites
1
Upenn - Training

Grants Managed in Your Orgs Grants Managed by Other Orgs

Right click on fund to see details by expense category

Operating Budget PJTD Expenses Total, Project to Date Outstanding Encumbrances Balance Available

Toggle between funds of your faculty managed by your org and funds managed by other orgs

Resp Org	Primary PI	Fund	Sponsor	Des	Operating Budget PJTD	Expenses Total, Project to Date	Outstanding Encumbrances	Balance Available
202	CICHON, JOSEPH	501034	AMERICAN SOCIETY OF REGIONAL ANESTHESIA	ASRA PAST MEDICINE AWARD	\$700,000	\$128,729	\$122,441	\$119,127
202	CICHON, JOSEPH	588207	NATIONAL INSTITUTE OF GENERAL MEDICAL SCIENCES/NIH/DHHS	5-R35-G-151160-	\$5,258	\$5,121,258	\$368,211	\$831,245
202	CULLEY, DEBORAH	500197	BRIGHAM AND WOMEN'S HOSPITAL	GR01268 S01	\$403,632	\$0	\$0	\$280,034
202	CULLEY, DEBORAH	583359	NATIONAL INSTITUTE OF GENERAL MEDICAL SCIENCES/NIH/DHHS	5-R01-GM-132668-06	04/01/21	01/31/26	01/31/26	\$8,009,492
202	JOSEPH, THOMAS T	580979	NATIONAL INSTITUTE OF GENERAL MEDICAL SCIENCES/NIH/DHHS	5-K08-GM-139031-05	09/01/20	12/31/25	12/31/25	\$984,420
Total					\$17,463,130	\$69,876,660	\$68,466,348	\$5,179,625
							\$11,041,469	\$7,095,900

Funds due to close

Expiring/Expired Funds

NOV-25 Accounting Period

Principal Investigator Organization Division Department

All All All 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

Choose among tabs to get lists of grants that have or will expire

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

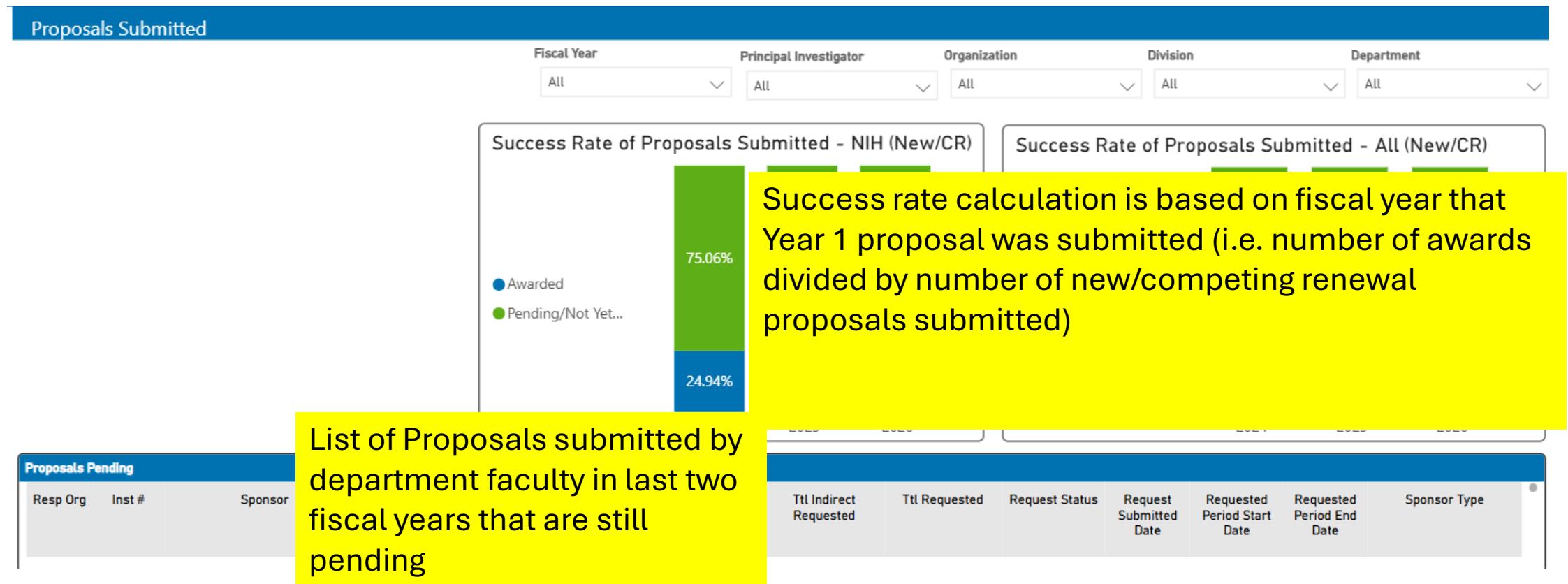
Accounts Receivable

Reports of all current Accounts Receivable (billing)

Accounts Receivable					
JAN-26	Fund	Principal Investigator	Organization	Division	Department
Accounting Period	All	All	All	All	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

Delinquent effort reports are updated quarterly.

Delinquent Effort Forms

Pending Administrative Review	Pending Faculty Certification	Total Delinquent
150	320	470

Delinquent Effort Reports by Resp Org

Org	Employee Name	Pending Status	Reporting Period	Reviewer	Quarterly Update Date

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

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.

PSOM Fund Reporting

File Share Export Subscribe Set alert ...

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Writeoffs Fiscal Year To Date

(\$990.34K) (\$0.86M) (\$0.13M) 2026

Success Rate of Proposals Submitted - All (New/CR)

Year	Awarded	Pending/Not Yet ...
2024	69.37%	30.63%
2025	78.96%	21.04%
2026	92.54%	

Funds Due to Close

Category	Count
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Other

Category	Count
Accounts receivable overdue by 90 days or more or > \$100,000	0
Delinquent Effort Reports	84
IRB/IACUC Expired	17
IRB/IACUC Unattached Protocol Doc	76

Fund Reporting (PI View) **Portfolio Overview** Fund Summary Active Lab Personnel Proposals Pending Expired/Overdraft Funds Questions and Feedback ... About This Dashboard

Go back

137%

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, titled 'PSOM Fund Reporting', lists navigation options: 'PI Fund Reporting', 'Portfolio Overview' (which is selected and highlighted in blue), 'Fund Summary', 'Active Lab Personnel', 'Proposals Pending', 'Expired/Overdraft Funds', and 'Questions and Feedback...'. Below these is a 'Go back' button. 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 yellow box covers the list of active funds. At the bottom, there are two charts: 'Total Awarded by Sponsor Type' (a donut chart) and 'Expenses Plus Encumbrances and Balance Available by Fund Desc' (a horizontal bar chart).