SPONSORED PROJECT ADMINISTRATION (SPA)

PRESENTS

**PI Portal**

Your Gateway to PI Friendly Sponsored Project Expenditure Reports

**Web Based**

Intuitive-Quick-Easy

Visual Job Aid for use with the PI Portal

Version 1/1/2023
Specifically designed for Investigators and Research Administrators who need sponsored project fiscal information quickly and easily to answer questions such as:

- How much money do I have left to spend?
- Will I have Carryforward?
- Will I have funds available for a No Cost Extension?
- Who is being Paid from my Grant?

10 Great Features

1. Data Refreshed Nightly
2. Project Expenditure Detail
3. Payroll Expenditure by Person
4. Payroll Distributions by Person
5. Effort Commitment by Key Personnel
6. Non-Payroll Expenditure Detail
7. Cost Sharing Detail
8. Search Engine for Transactions
9. Email Notification
10. Download Results to Excel

The concept is simple; on-line banking for sponsored project funding
PI Portal: Login

1. Click PI Portal: Login
2. Click $ Financials
3. Login with your Net ID

or

PI/Project Manager Login

1. Click PI Portal: Login
2. Click $ Financials
3. Login with your Net ID

MyUVM

1. Click MyUVM
2. Click PS Financials
3. Login with your Net ID
4. Select UVM Employee
5. Click PI Portal Tile
PI Portal: Project Manager Landing Page

- Project Managers are PI eligible faculty.
- Display will include the following:
  - All Active Projects
  - Expired Projects (for 120 days post expiration date)

<table>
<thead>
<tr>
<th>Hyperlink</th>
<th>Project and Award Identifiers</th>
<th>Time</th>
<th>Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project ID</td>
<td>Project Manager</td>
<td>Project Title</td>
<td>Award ID</td>
</tr>
<tr>
<td>39118</td>
<td>Project Manager: DMREF/Collaborative Research</td>
<td>Award PI</td>
<td>Award PI</td>
</tr>
<tr>
<td>38187</td>
<td>Project Manager: AI Institute: Planning</td>
<td>Award PI</td>
<td>Award PI</td>
</tr>
<tr>
<td>500301</td>
<td>Project Manager: Molecular and Cellular Self Organization</td>
<td>Award PI</td>
<td>Award PI</td>
</tr>
<tr>
<td>35603</td>
<td>Project Manager: GR104715 (CON-80001519)</td>
<td>Award PI</td>
<td>Award PI</td>
</tr>
<tr>
<td>37888</td>
<td>Project Manager: REU Supplement: EFRI C3 SoRo</td>
<td>Award PI</td>
<td>Award PI</td>
</tr>
<tr>
<td></td>
<td>GRID TOTALS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PI Portal: Project Summary (Budget, Chartstring & Expenditures)

From the Project Manager Landing Page, Click the Project Hyperlink and the Project Summary Page Opens.

![Image of Project Summary Page]

- **Award Demographics**
  - PI Name
  - Award Title
  - Sponsor
  - Prime Award ID
  - Prime Sponsor

- **Billing Occurs at the Award Level**
  - Includes 90 Day Pre-award spending:

- **Spending Occurs at the Project Level**

- **Money**

<table>
<thead>
<tr>
<th>Account</th>
<th>Account Description</th>
<th>Budget</th>
<th>Open Encumbrances (Thru 6/30)</th>
<th>Expenditures</th>
<th>Remaining Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>F5000</td>
<td>Personal Salary</td>
<td>262432.00</td>
<td>27004.42</td>
<td>13836.74</td>
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<tr>
<td>2</td>
<td>F5900</td>
<td>Fringe Benefits</td>
<td>85300.00</td>
<td>6846.07</td>
<td>3993.72</td>
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<tr>
<td>3</td>
<td>F6000</td>
<td>Other Expenses and Services</td>
<td>57060.00</td>
<td>4393.90</td>
<td>4417.80</td>
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<tr>
<td>4</td>
<td>F6010</td>
<td>Publication Costs</td>
<td>2000.00</td>
<td>2000.00</td>
<td>2000.00</td>
</tr>
<tr>
<td>5</td>
<td>F601</td>
<td>Computer Devices</td>
<td>11000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>F6020</td>
<td>Domestic Travel</td>
<td>17220.00</td>
<td>2821.03</td>
<td>14368.97</td>
</tr>
</tbody>
</table>
Click on the Payroll Information Tab and the Payroll Expenses & Distributions Page Opens.

Review to ensure the correct people are being charged to the Project. Who is missing? Make corrections where needed.

Warning
There are distributions that go beyond the end date of the project, please correct.

Time to fix Distributions and Not wait for closeout

Need help? Click Notify and send email that includes a hyperlink to the Project Summary Page.
Click on the **Transaction Detail Tab** and you can find all transactions or search for particular cost items.

Run Searches by Budget Line Items and People

Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.
Click on the Financial Documents Tab and you can find reports and invoices submitted to the sponsor.

Click on the hyperlink and open the Invoice.pdf document.

Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.
Click on the **Personnel Commitments Tab** and review Key Personnel and Faculty Time Commitments devoted to the Project.

### Key Personnel Time Commitments

- **Calendar**
  - Academic: 50.00
  - Summer: 17.00
  - Direct Charge: 50.00
  - Cost Share: 30.00

### Personnel Commitments Table

<table>
<thead>
<tr>
<th>Empid</th>
<th>Name</th>
<th>Empl Class</th>
<th>Key Personnel</th>
<th>Role</th>
<th>Start Date</th>
<th>End Date</th>
<th>Academic</th>
<th>Academic Cost Share</th>
<th>Calendar</th>
<th>Summer</th>
<th>Calendar Cost Share</th>
<th>Direct Charge</th>
<th>Cost Share</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Person 1</td>
<td>12F</td>
<td>Y</td>
<td>Co-PI</td>
<td>08/01/2022</td>
<td>07/31/2023</td>
<td></td>
<td></td>
<td>50.00</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td>Person 2</td>
<td>06F</td>
<td>N</td>
<td>Faculty</td>
<td>08/01/2022</td>
<td>07/31/2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>17.00</td>
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<td></td>
</tr>
<tr>
<td>3</td>
<td>Person 3</td>
<td>12F</td>
<td>Y</td>
<td>Co-PI</td>
<td>08/01/2022</td>
<td>07/31/2023</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>30.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: Key personnel effort reduction of 25% or more requires prior approval from the sponsor.*

Need Help? Click Notify and send email, that includes a hyperlink to the Project Summary Page.
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**PI Portal: Search Window**

Search Window doubles as the Landing Page for Staff

**Search:**
For example, search by the PS Award ID. Results will display all active PS projects established under that PS Award ID.

**Default Search is set to Active:**
Toggle btw Active and All Projects (All = active, expired, closed)