## Question: How do I view my completed financial report in eGrants?

To view financial reports in eGrants:

- 1. Login to the <u>eGrants</u> portal using your UTSW username and password.
- 2. Navigate to the Awards tab

UT Sout	<b>hwester</b> edical Cent	<b>'n</b> eR er	esearch e	Grants		
My eGrants Home	Home	eGrants	Awards	elRB Studies	eAgreements	

3. Go to All Financial Reports tab for access to all your department's awards.

UT Southweste Medical Cer	rn eRese	arch eGrants						
My eGrants Home	Home	eGrants		Awards	eIRB Studies	eAgreements		
Awards			101			1.57 67		
	Awards							
	Active Awards	Awastis in Progress	Awards Closed	All Awards	All Deloverables	All Award Medifications	All Financial Reports	Awarded Budgets

- a. You can filter by Award ID, PI name, and other attributes.
- b. Enter the applicable text into the Search box, then click the Search icon.

Filter by 🔞	ID	Enter text to search • Add Filter × Clear All		1
ID	Name	PI Last PI First Owner Last First Last State Sponsor Start Date End Date Gra	Int Number FAIN Tote Modifie	ed

- 4. Select the appropriate award by clicking on the name.
- 5. Under the **Name** column, click on the report you want to view.

Active Awards	Awar	ls in Progress	Awards Closed	l All Awa	rds /	All Deliverables	All Fina	ncial Repor	ts		
Filter by 😮	ID	•	Enter text to search			Q + Add Filter	🗙 Clear All				¢
ID	▼ Name	Date Created	Date Modified State	Sponsor	Due Date	PI Last PI	First Owner Last	Owner I First I	Primary Budget	A B	warded udgets
	Quarterly Report	7/11/2016 10:44 AM	3/20/2017 Receipt 9:32 PM Confirmed	CANCER PREVENTION & RESEARCH INST OF TX	8/29/2016						

**Name** options are based on report cycle, and are only available for those report types which are currently in queue for completion:

- a. Monthly
- b. Quarterly
- c. Interim
- d. Internal
- e. Annual
- f. Annual-NCE
- g. Final-End of Segment
- h. Final
- 6. You will then be in the **Financial Report Workspace**. Users are able to see the following information:
  - 1. Current state of the financial report
  - 2. Award ID information

- 3. PI/Dept information
- 4. Sponsor information
- 5. Assigned SPA reporter
- 6. Award and Reporting start and end dates (may be different)
- 7. Financial Report/other documents

Current State	Annual		2 SPA000 FINRPT002 Financial Report Workspace
View Financial Report	PD/PI: Fellow:	3 Sebastian Winter	Award Start Date: 7/1/2018 Award End Date: 6/30/2023
Printer Version	Report Accountant: Dept Contact:	Jennifer DuGan 5 Raina Smith	Reporting Period Start Date: 7/1/2019 Reporting Period End Date: 6/30/2020
Email SPA Reporter	Sponsor: Prime Sponsor:	4 BURROUGHS WELLCOME FUND	Award Type: Grant Report Due Date: 8/1/2020
(Financial Report Template)	Submitting Dept/Center: Submitting Div (if applicable):	Microbiology MB-Lab Winter	Sponsor Award No.: 1017880 CFDA#:
	History Attachments 7		
	Activity	Author	✓ Activity Date
	Submit to Sponsor	DuGan, Jennifer D	7/15/2020 9:11 AM

- 7. Navigate to the **Current State** column on the left side of the screen.
- 8. Click View Financial Report

Current State	Annual		SPA000 -FINRPT002 Financial Report Workspace
View Financial Report	PD/PI: Fellow:	Sebastian Winter	Award Start Date: 7/1/2018   Award End Date: 6/30/2023
Printer Version	Report Accountant: Dept Contact:	Jennifer DuGan Raina Smith	Reporting Period Start Date: 7/1/2019   Reporting Period End Date: 6/30/2020
Email SPA Reporter	Sponsor: Prime Sponsor:	BURROUGHS WELLCOME FUND	Award Type: Grant Report Due Date: 8/1/2020
(Financial Report Template)	Submitting Dept/Center: Submitting Div (if applicable):	Microbiology MB-Lab Winter	Sponsor Award No.: 1017880 CFDA#:
	History Attachments		
	Activity	Author	✓ Activity Date
	Submit to Sponsor	DuGan, Jennifer D	7/15/2020 9:11 AM

9. Go to section 4.0, "Attachments".

UTSouthwestern Medical Center	eResearch eGrants						
	Reading: SPA000	INRPT002					
Report Information							
2.0 Department Contact Information	1.0 Financial Report Information						
	1.1 Program Director / Principal Investigator: Sebastian Winter						
3.0 Reporting Period Information	Fellow (if applicable):						
4.0 Attachments	Award Name: Metabolic Host-Microbe Interactions in the Intestinal Tract						
5.0 Einancial Report	Funding Award: SPA000						
SmartForm	NIH Award Reference ID	Sponsor Contract ID					
	Sponsor: BURROUGHS WELLCOME FUND Prime Sponsor (if applicable): Award Start Date: 7/1/2018 Award End Date: 6/30/2023 • 1.2 Financial Report Type: Annual • 1.2 Financial Report Description: Annual • 1.3 Financial Report Due Date: 8/1/2020 • 1.4 Is this a final financial report for a CPRIT M	o Sono MRA award? ○ Ye	25 💽 No				

10. Under section 4.4, **"FOR-Signed Financial Report PDF**" you will find the finalized financial report available for download. Options are:

- a. "FOR Signed" is the exact copy of the report
- b. "FSR Signed" is the PDF version of the report

≡ «		4 Go to forms menu  🖨 Print 🔻
1.0 Financial Report		Help
mornation	4.0 Attachments	
2.0 Department Contact Information	4.1 Drafted Financial Report: The attachments in this section (4.1) are in Draft form and is for SPA use only, please do not download.	
	Name	Version
3.0 Reporting Period Information	SPA0003430_REPORTS_10031182_MAY 2022_ANNUAL,	0.01
4.0 Attachments	SPA0003430_REPORTS_10031182_MAY 2022_ANNUAL	0.01
5.0 Financial Report	4.2 Unsigned Financial Report PDF:	
SmartForm	Name	Version
Complete	B SPA0003430_REPORTS_10031182_MAY 2022_ANNUAL	0.01
	4.3 PI-Signed Financial Report PDF:	
	Name	Version
	A 2020 0550 05 05 05 05 05 05 05 05 05 05 05	0.01
	4.4 FOR-Signed Financial Report PDF:	
(	Name	Version
	₫) FOR signed(0.01)	0.01
	4.5 Sponsor Receipt Confirmation:	
	Name Version	
	There are no items to display	
	4.6 Other Documents:	
	Name	Version
	2 11544 Welch Termination Form	0.01

- 11. To exit the financial report, choose the **Exit** option at the bottom of the screen.
- 12. To logout of eGrants, click **Logoff** in the drop-down menu next to your name.

## END OF INSTRUCTIONS