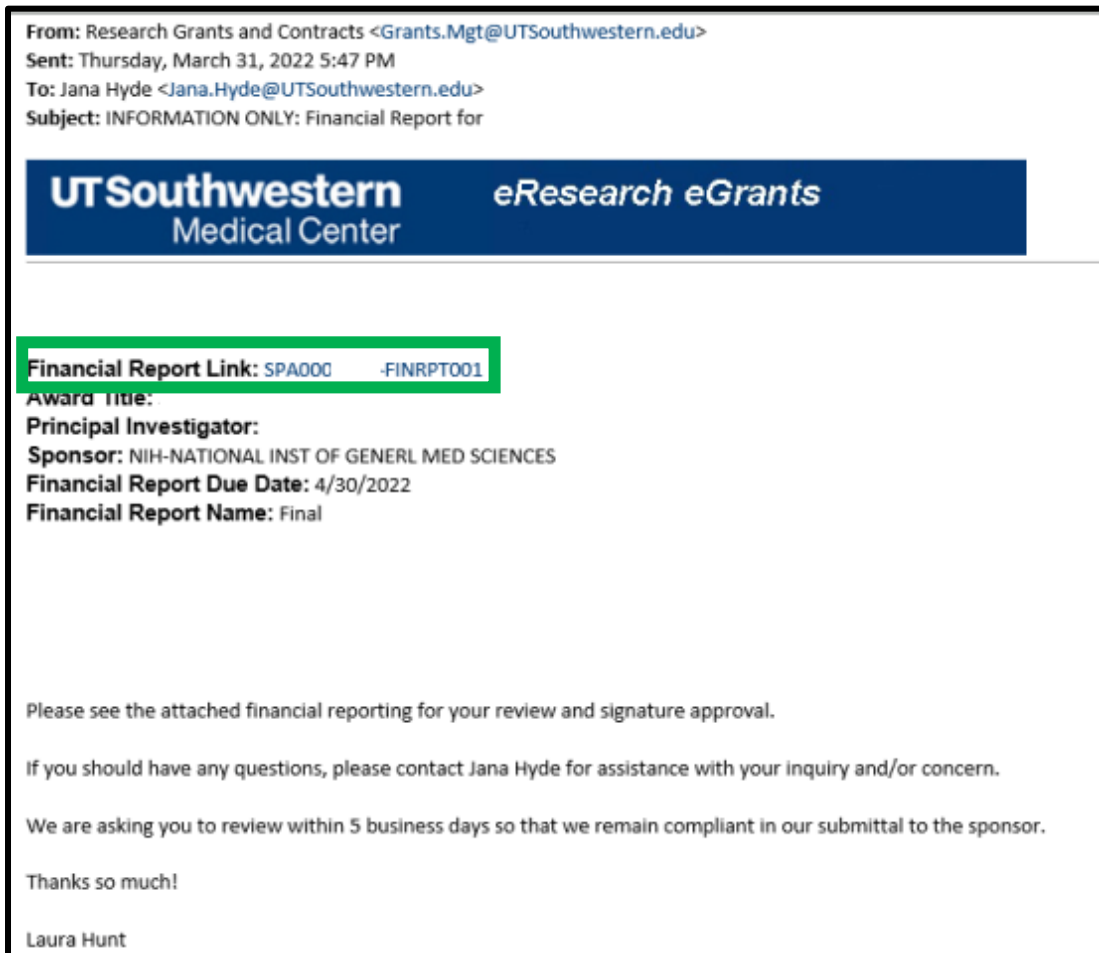


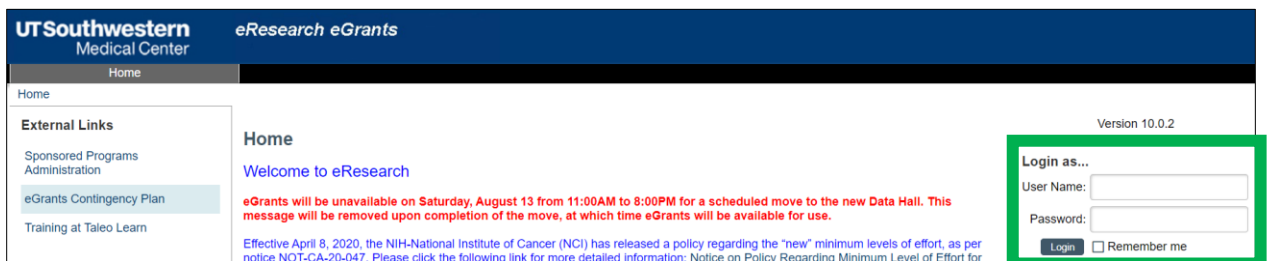
## Question 2: How does the PI access, upload signed financial report, and complete PI Assurance?

To access and sign financial report and complete PI assurances in eGrants:

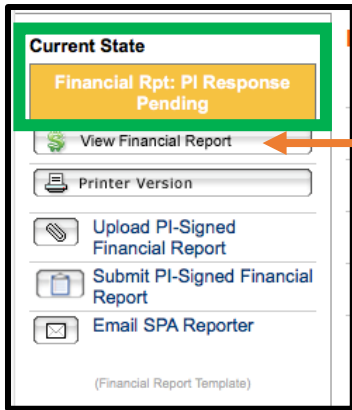
1. The SPA Financial Analysis Manager will submit report for PI review in eGrants.
2. The PI receives an eGrants-generated email with a link to the financial report.
3. Click the link to the financial report, then log in to eGrants when prompted.



4. Log in to the eGrants portal using your UTSW username and password.



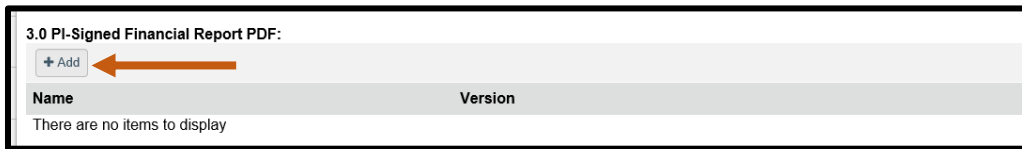
5. Navigate to the **Current State** column on the left side of the screen.
6. Current State is **Financial Rpt: PI Response Pending**



7. Click **View Financial Report**
8. On the next screen refer to the section titled “**Unsigned Financial Report PDF.**” There you will find the unsigned financial report.

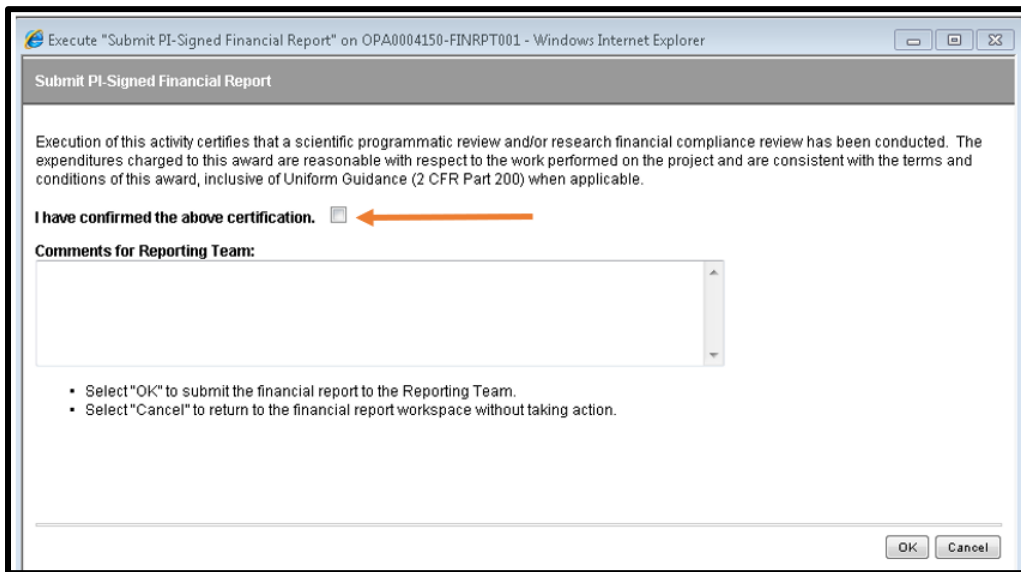


9. Open file, review, and sign report. Electronic signatures are acceptable.
10. **PI-Signed Financial Report PDF** of the Financial Reporting Workspace:



- a. Click **Add**, then upload the signed Financial Report.
- b. **Submit PI-Signed Financial Report** to complete the “Execute ‘Submit PI-Signed Financial Report’”. The status will not change unless the PI-signed report is uploaded in PI-Signed Financial Reporting workspace.
11. Click the “I have confirmed the above certification” radio button/box. **Note: Only the PI can complete this task** Comments or questions for your SPA Financial Reporter can be

added in the comments box. Click OK.



The screenshot shows a web browser window with the title "Execute 'Submit PI-Signed Financial Report' on OPA0004150-FINRPT001 - Windows Internet Explorer". The main content area is titled "Submit PI-Signed Financial Report" and contains the following text: "Execution of this activity certifies that a scientific programmatic review and/or research financial compliance review has been conducted. The expenditures charged to this award are reasonable with respect to the work performed on the project and are consistent with the terms and conditions of this award, inclusive of Uniform Guidance (2 CFR Part 200) when applicable." Below this text is a checkbox labeled "I have confirmed the above certification." with an orange arrow pointing to it. Underneath is a text area labeled "Comments for Reporting Team:". At the bottom of the form are two buttons: "OK" and "Cancel".

12. The financial report will now route to the SPA financial officer for approval and submission to sponsor.
13. To log out of eGrants, click **Logoff** in the drop-down menu next to your name.

**END OF INSTRUCTIONS**