## 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.

From: Research Grants and Contracts <grants.mgt@utsouthwestern.edu> Sent: Thursday, March 31, 2022 5:47 PM To: Jana Hyde <jana.hyde@utsouthwestern.edu> Subject: INFORMATION ONLY: Financial Report for</jana.hyde@utsouthwestern.edu></grants.mgt@utsouthwestern.edu>
UT Southwestern Medical Center eResearch eGrants
Financial Report Link: SPA000 -FINRPT001 Award Title: Principal Investigator: Sponsor: NIH-NATIONAL INST OF GENERL MED SCIENCES Financial Report Due Date: 4/30/2022 Financial Report Name: Final
Please see the attached financial reporting for your review and signature approval.
If you should have any questions, please contact Jana Hyde for assistance with your inquiry and/or concern.
We are asking you to review within 5 business days so that we remain compliant in our submittal to the sponsor.
Thanks so much!
Laura Hunt

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

UT Southwestern Medical Center	eResearch eGrants	
Home		
Home		
External Links	Home	Version 10.0.2
Sponsored Programs Administration	Welcome to eResearch	Login as
eGrants Contingency Plan	eGrants will be unavailable on Saturday, August 13 from 11:00AM to 8:00PM for a scheduled move to the new Data Hall. This	User Name:
Training at Taleo Learn	message will be removed upon completion of the move, at which time egrants will be available for use. Effective April 8, 2020, the NIH-National institute of Cancer (NCI) has released a policy regarding the "new" minimum levels of effort, as per notice NOT-CA-20-047 Plaese click the following link for more detailed information: Notice on Policy Reparting Minimum Level of Effort for	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.

		-		
	~	3.0 Reporting Period Information	Go to forms	menu 🔒 Print 🕶
1.0 Financial Report Information		* 3.1 Report Period Start Date: 6/1/2022		
2.0 Department Contact Information		* 3.2 Report Period End Date: 1/31/2023		
3.0 Reporting Period Information				Help
4.0 Attachments		4.0 Attachments		
		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.		
5 0 Financial Report SmartForm Complete		Name	v	/ersion
		SPA_Refund Request Form-SPA0002834.pdf(0.01)	0	0.01
		SPA0002834_REPORTS_10016760_Seemann_Weich Final xisx(0.01)	0	0.01
		SPA0002834_REPORTS_10016760_Seemann_Weich Final xisx(0.01) approved(0.01)	0	0.01
		4.2 Unsigned Financial Report PDF:		
		Name	Ve	rsion
		B SPA0002834_REPORTS_10016760_Seemann_Welch Final.xlsx(0.01)(0.01)	0.0	01

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

3.0 PI-Signed Financial Report PDF:					
+ Add					
Name	Version				
There are no items to display					

- 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.

缓 Execute "Submit PI-Signed Financial Report" on OPA0004150-FINRPT001 - Windows Internet Explorer
Submit PI-Signed Financial Report
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.
I have confirmed the above certification. 🔲
Comments for Reporting Team:
×
<ul> <li>Select "OK" to submit the financial report to the Reporting Team.</li> <li>Select "Cancel" to return to the financial report workspace without taking action.</li> </ul>
OK 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