Faculty Financial Summary: Content Overview

The purpose of this document is to provide an overview of the content available in the Faculty Financial Summary. For additional information related to the use of the Faculty Financial Summary, please see the EBI website related to faculty reporting at: http://ebi.emory.edu/faculty.html

General Content Notes

- EBI reporting is always 1 day behind the Compass production data
- Date/time displayed at the top of the dashboard indicates the warehouse last refresh date/time
- Performance tiles all drill to details related to the number displayed on the tile

Grants and Contracts

Performance Tiles:

- ***Projects Ending in the Next 90 Days*** – Count of all sponsored projects for which you have been assigned responsibility as the Award PI or Project PI, that have a Project End Date within the next 90 days
- ***Employees Paid by Projects Ending in the Next 90 Days*** – Count of all employees paid from sponsored projects for which you have been assigned responsibility as the Award PI or Project PI, where the Project End Date occurs within the next 90 days.
- ***Active Projects with Direct Balance Available*** – Count of all active sponsored projects (projects where the Project End Date has not passed) where the Direct Expense Balance is greater than $0.00.
- ***Active Projects with Deficit Balanc**e* – Count of all active sponsored projects (projects where the Project End Date has not passed) where the Total Available Balance is less than $0.00.

Tabular Reports:

- ***Available balance on active awards for which you have been identified as the Award PI*** – A table which displays all projects on all active awards (awards where the Award End Date has not passed) to which you have been assigned as the Award PI, and provides details related to the award and project information.
    - Details include:
        - Award Number and Description
        - Agency Name
        - Award Department
        - Award Begin Date
        - Award End Date
        - Award PI
        - Project ID and Description
        - F&A Rate
        - Project Department
        - Total Budget
        - Direct Budget
        - Total Expenses
        - Direct Expenses
        - Total Encumbrance
        - Total Available Balance

- Direct Available Balance
    - o Drill capability is possible on the Award Number and Description and the Project ID and Description and takes users to the Sponsored Trend Report.
    - o Available views in the View Selector:
        - Award Summary
        - Award/Project Summary
        - Award Summary Direct Costs Only
        - Award/Project Summary Direct Costs Only
- ***Available balance on active awards for which you have been identified as the Project PI***– A table which displays the projects on active awards (awards where the Award End Date has not passed) to which you have been assigned as the Project PI, and provides details related to the award and project information.
    - o Details include:
        - Project ID and Description
        - Project Begin Date
        - Project End Date
        - F&A Rate
        - Award Number and Description
        - Award PI
        - Award Begin Date
        - Award End Date
        - Total Budget
        - Direct Budget
        - Total Expenses
        - Direct Expenses
        - Total Encumbrance
        - Total Available Balance
        - Direct Available Balance
    - o Drill capability is possible on the Project ID and Description and takes users to the Sponsored Trend Report.
    - o Available views in the View Selector:
        - Project Summary
        - Project Summary Direct Costs Only

Effort Reporting and Labor

Performance Tiles:

- ***# of Forms Pending Certification Past Due*** – Count of Effort forms that have been pre-reviewed, are pending certification by the faculty member for whom the report has run, and are past due.
- ***Proposed Effort on Active Projects*** – Percentage of effort committed at the time of proposal submission by the faculty member for whom the report has run, on sponsored projects where the Project End Date has not passed.
- ***Employees with Effort in Previous Effort Reporting Period*** – Count of employees who certified effort in the prior effort reporting period on all sponsored projects to which the faculty member prompted has been assigned responsibility.
- ***Employees Paid on All Projects in the Prior 6 Months*** – Count of employees paid on all projects (sponsored and non-sponsored) in the prior 6 months for projects to which the faculty member prompted has been assigned responsibility.

Tabular Reports:
- ***Effort Details for Effort Reporting Period Ending: XX/XX/XXXX*** – This table provides the effort details for the prompted faculty member as of the effort reporting period ending on the date displayed.
  - o During the window of time in which the effort reporting period is being certified, the most recent effort reporting period, and the prior effort reporting period are displayed.
  - o When the certification due date has passed, only the most recent effort period is displayed.
  - o Details provided in this report include:
    - ▪ Employee ID and Name
    - ▪ Type of Funding (Non-Sponsored Projects, Sponsored Projects, Unrestricted Operating Budgets)
    - ▪ Sponsor Name (if applicable)
    - ▪ Charged Project ID and Description (if applicable)
    - ▪ Salary Cap Indicator
    - ▪ Proposed Effort (%)
    - ▪ Certified Amount (%)
    - ▪ Payroll Amount (%)
  - o Please note that payroll dollars are not provided, and therefore labor security is not applied

Proposals
Performance Tiles:
- ***Pending Proposals Under 12 Months from Submit Date*** – Count of proposals still in pending status (not awarded) where the proposal submission date is less than 12 months ago.
- ***Pending Proposals Over 12 Months from Submit Date*** – Count of proposals still in pending status (not awarded) where the proposal submission date is greater than 12 months ago.

Tabular Report:
- ***Pending Proposals Under 12 Months from Submit Date*** – A table that displays details for the proposals still in pending status (not awarded) where the proposal submission date is less than 12 months ago.
  - o Details include:
    - ▪ Proposal ID
    - ▪ Proposal Name
    - ▪ Agency Name
    - ▪ Award PI
    - ▪ Operating Unit
    - ▪ Division
    - ▪ Department
    - ▪ Total Budget
    - ▪ Direct Budget
    - ▪ Indirect Budget
    - ▪ Purpose Type
    - ▪ Proposal Type
    - ▪ Sponsor Type
    - ▪ Submit Date
    - ▪ Proposal Period

Non-Sponsored Projects

Performance Tiles:

- ***Employees Paid in the Prior Month*** – Count of employees paid in the prior month from non-sponsored projects for which the faculty member prompted has been assigned responsibility.
- ***Available Balance on All Non-Sponsored Projects*** – Sum total of the available balances for all of the non-sponsored projects for which the faculty member prompted has been assigned responsibility.
- ***Non-Sponsored Projects with Deficit Balances*** – Count of non-sponsored projects that have an available balance that is less than $0.00.

Tabular Reports:

- ***Available Balance for Non-Sponsored Projects*** – Provides a list of all non-sponsored projects for which the faculty member prompted has been assigned responsibility, including project information and financial information.
    - o Details Include:
        - ▪ Project ID and Description
        - ▪ Fund Code
        - ▪ Department
        - ▪ Budget
        - ▪ Current Month Expenses
        - ▪ Total Expenses
        - ▪ Encumbrance
        - ▪ Available Balance
    - o Drilling on the Project ID and Description will take the user to the non-sponsored trend report