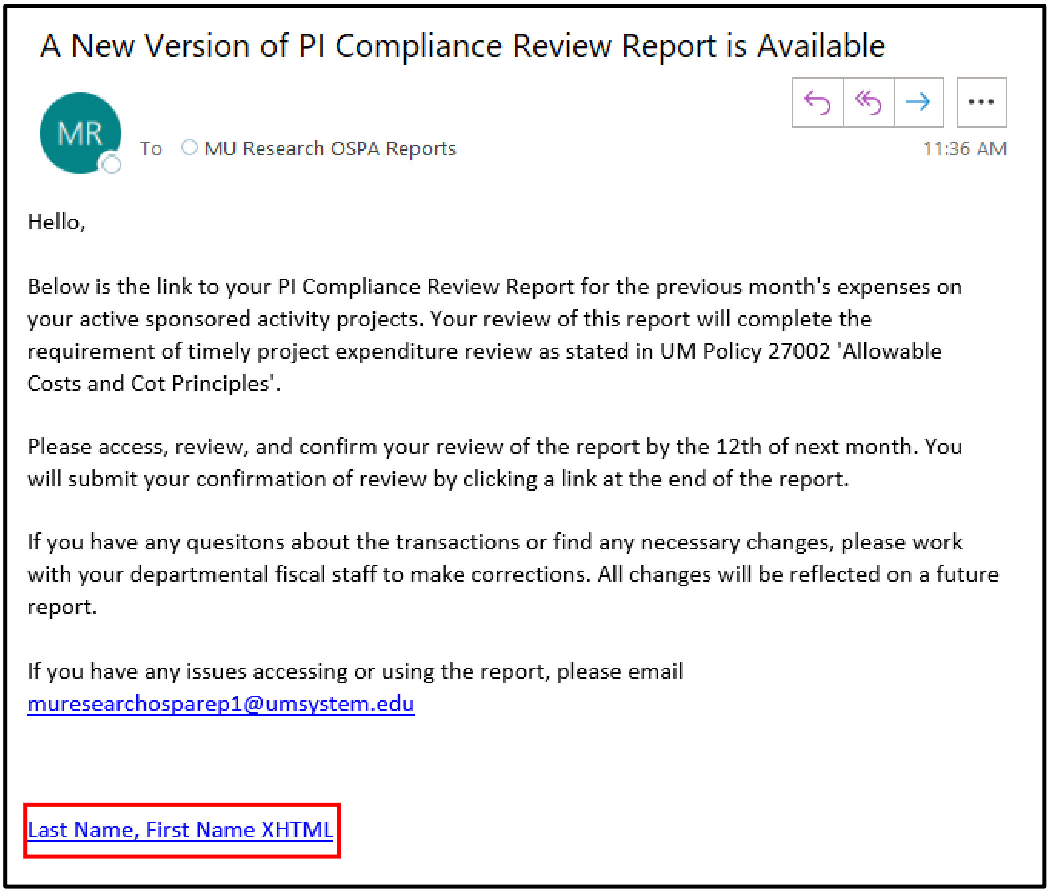
PI Review Instructions

Each month you will receive an email, like the one below, that provides a link to a personalized report with information for the previous month's transactions for all your active projects. Completing the review of the information contained in the report is required by [UM Policy 27002: 'Allowable Costs and Cost Principles'](#).

*After you login to Cognos, please do not try to navigate around the website. Do not click "Refresh" or click the Home Icon. The only accurate way to access your information is through the link found in the email sent each month.

1. When you receive the email, click the link at the bottom of the email that contains your name.



A New Version of PI Compliance Review Report is Available

MR To MU Research OSPA Reports 11:36 AM

Hello,

Below is the link to your PI Compliance Review Report for the previous month's expenses on your active sponsored activity projects. Your review of this report will complete the requirement of timely project expenditure review as stated in UM Policy 27002 'Allowable Costs and Cot Principles'.

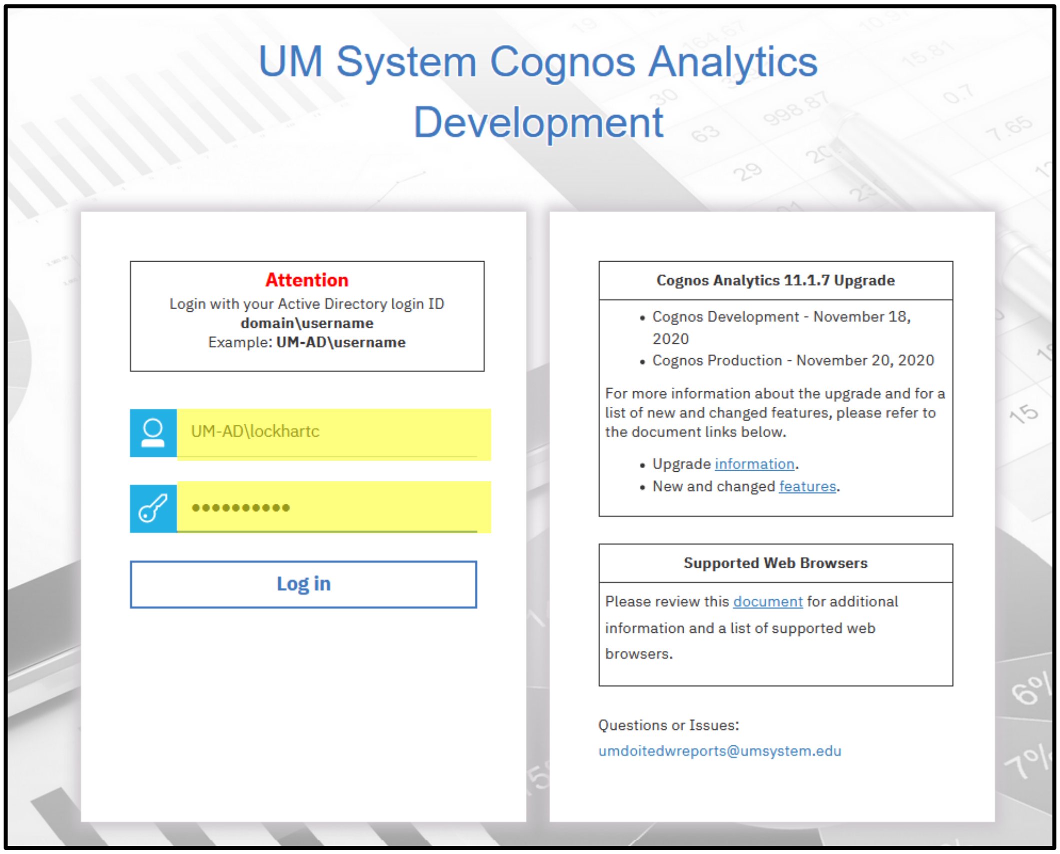
Please access, review, and confirm your review of the report by the 12th of next month. You will submit your confirmation of review by clicking a link at the end of the report.

If you have any quesitons about the transactions or find any necessary changes, please work with your departmental fiscal staff to make corrections. All changes will be reflected on a future report.

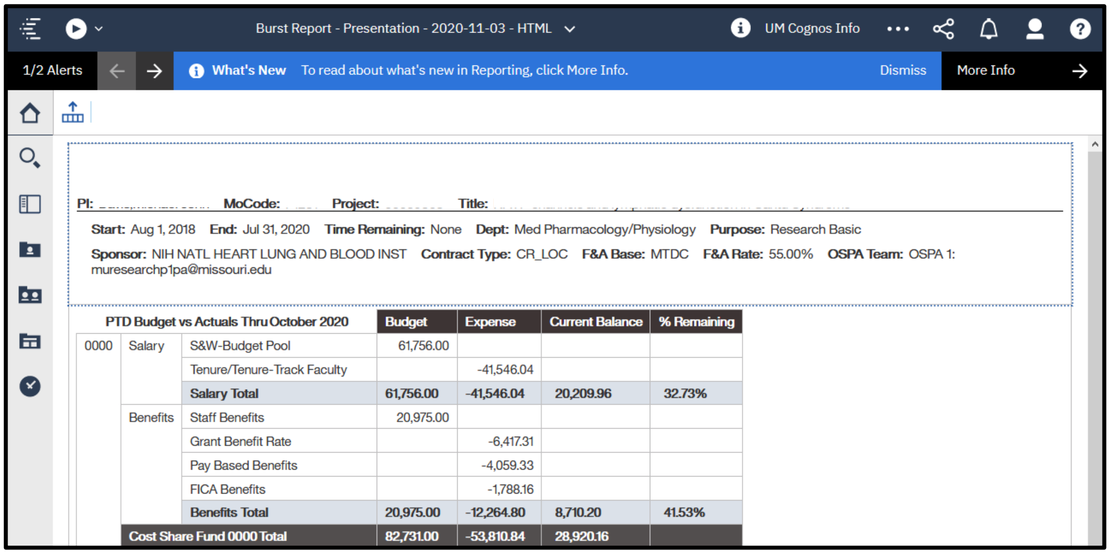
If you have any issues accessing or using the report, please email muresearchosparep1@umsystem.edu

Last Name, First Name XHTML

2. After clicking the link, you will be redirected to your web browser and prompted to login to Cognos.
    a. You should already have access to Cognos and the ability to view all necessary information
    b. Input UM-AD\ then your Username & Password OR username@umsystem.edu & Password



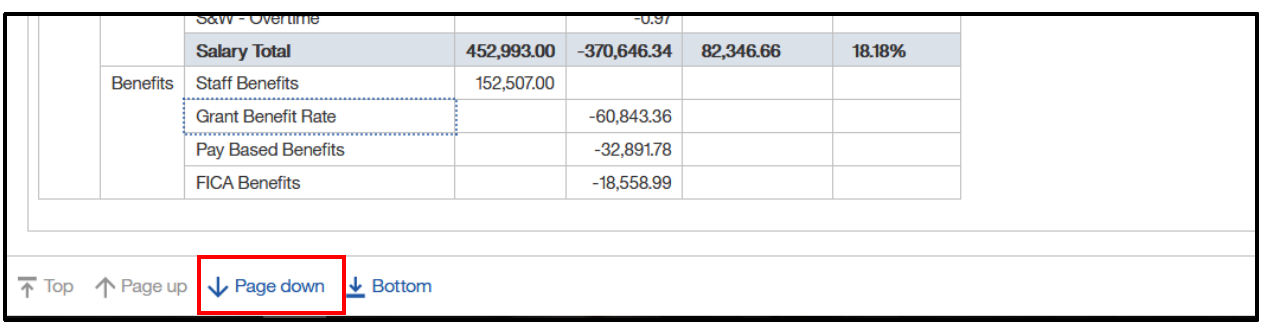
3. Your report will appear
    a. Each report will contain information for all your projects, separated by project



PTD Budget vs Actuals Thru October 2020			Budget	Expense	Current Balance	% Remaining
0000	Salary	S&W-Budget Pool	61,756.00			
		Tenure/Tenure-Track Faculty		-41,546.04		
		Salary Total	**61,756.00**	**-41,546.04**	**20,209.96**	**32.73%**
	Benefits	Staff Benefits	20,975.00			
		Grant Benefit Rate		-6,417.31		
		Pay Based Benefits		-4,059.33		
		FICA Benefits		-1,788.16		
		Benefits Total	**20,975.00**	**-12,264.80**	**8,710.20**	**41.53%**
	Cost Share Fund 0000 Total		**82,731.00**	**-53,810.84**	**28,920.16**	

4. Each project will contain the following information:
    a. Budget vs Actuals breakdown as of the end the previous month
    b. Payroll transactions posted the previous month with a % of salary for that employee
    c. Benefit expenses posted to the project, related to the salary
    d. Expenses that were charged to the project through the T&E module in PeopleSoft
    e. All other expenses posted to the project the previous month

5. Once you have reviewed all the information on the screen click, Page down at the bottom
    a. You can use all of the buttons on the very bottom of a page to navigate through the report



	Salary Total	**452,993.00**	**-370,646.34**	**82,346.66**	**18.18%**
Benefits	Staff Benefits	152,507.00			
	Grant Benefit Rate		-60,843.36		
	Pay Based Benefits		-32,891.78		
	FICA Benefits		-18,558.99		

6. After the Transactions Information, a new project will begin.

Transaction Information for October 2020

Grant Fund 2285

Expense Group	Journal Id	Journal Date	CS vs Grant	Account Descr	Line Descr	Monetary Amount
Dept Op	0013006276	Sep 25, 2020	Grant Fund 2285	Research animals expense	Research animals expense	348.40
	0013007288	Sep 28, 2020	Grant Fund 2285	Lab supplies	Davis CIC Billing - August 2020	263.40
			Dept Op - Total			**611.80**
SSF	0012976241	Sep 1, 2020	Grant Fund 2285	SSF-Animal Care	SSF-Animal Care	554.40
	0013006276	Sep 25, 2020	Grant Fund 2285	SSF-Animal Care	SSF-Animal Care	611.28
			SSF - Total			**1,165.68**
Grant Fund 2285 - Total						1,777.48
Overall - Total						**1,777.48**

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Start: Jan 1, 2020 **End:** Dec 31, 2020 **Time Remaining:** 1 Month **Dept:** Med Pharmacology/Physiology **Purpose:** Research Basic

Sponsor: NIH NATL HEART LUNG AND BLOOD INST **Contract Type:** CR_LOC **F&A Base:** MTDC **F&A Rate:** 55.00% **OSPA Team:** OSPA 1: muresearchp1pa@missouri.edu

PTD Budget vs Actuals Thru October 2020			Budget	Expense	Current Balance	% Remaining
0000	Salary	S&W-Budget Pool	24,813.00			

7. After you have reviewed all of the information for all your projects and you have reached the end of the report, there will be a box containing your name and Empl ID with a link.

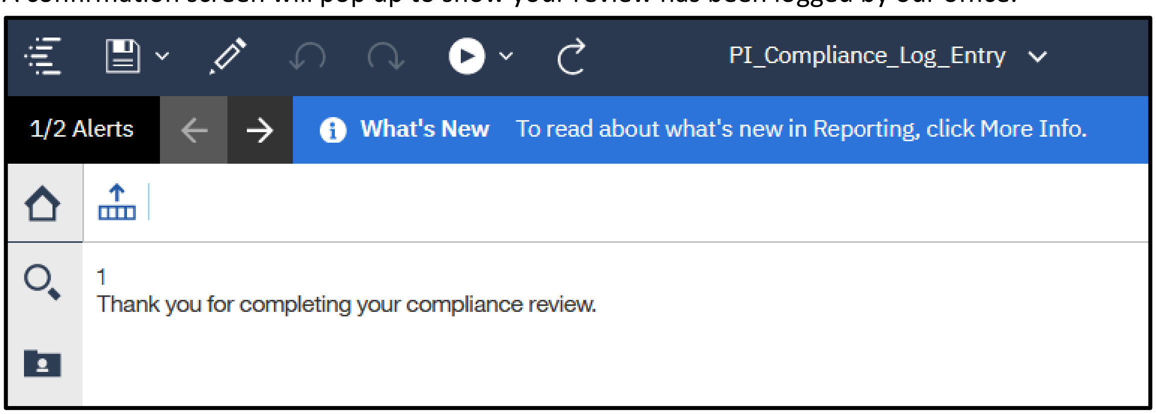
8. Click the link to submit your confirmation that you have Received and Reviewed the information

Thank you for completing your review of project transactions for October 2020

- By clicking the link below, you are confirming you have received and reviewed all the transactions posted in October 2020 to all the projects included in the report. This will complete the requirement of timely sponsored project expenditure review under UM Policy 27002 'Allowable Costs and Cost Principles'.
- If you found any expenses that need to be removed from or added to a project, please work with your departmental fiscal staff to make the corrections, which will be reflected in a future report.

Emplid	Name	October 2020
99999999	Last Name, First Name	Please Click to Complete Compliance Review for October 2020

9. A confirmation screen will pop up to show your review has been logged by our office.



10. We will send reminder emails to people who have not reviewed prior to the next report being sent

11. Note the link in the email will only take you to the current month's report
    a. If you look at the email you received 3 months ago and click the link contained, you will get an error message
    b. Reach out to your department staff to access a report received more than 1 month ago

12. Every 3 months, we will look at who has not completed a review of their report and reach out to department staff to ensure the report is reviewed.