School of Medicine Research Dashboard Guidance and Procedures

Access to the PI and RA Dashboards

PI’s with active grant indexes should already have access to the Dashboard. Other access to the Research Dashboard is given on an as-needed basis. Requests for access should be emailed to SOMRESADMIN@vcu.edu. Any potential Dashboard user who does not already have Banner Finance access will be required to take and pass the online Blackboard course “PAA001: Banner Basic Navigation & System/Data Security.”

Each PI with active grants should have their own PI Dashboard. Department administrators will be able to view the Dashboards for all PIs in their department as well as the RA (Research Administrator) Dashboard. The RA Dashboard aggregates PI and grant information at the department/division level.

Maintenance of Data Displaying in Research Dashboard

Source data for the Research Dashboard is held in the University’s Banner Finance, Banner HR, and VCUeRA systems. Primary responsibility for maintaining the data displayed in the Research Dashboard lies with the Department. Incorrect data in the Dashboard is a result of incorrect data in one of the University’s source systems (Banner, VCUeRA). Department administrators are expected to perform data verification in the PI and RA Dashboards on a regular basis, particularly at award set-up and award continuation. Requests to update source data in Banner and VCUeRA systems should be directed to Office of Sponsored Programs and Grants & Contracts Accounting as applicable.

Guidance documents for administrators can be found on the SOM Research Administration website.

Research Dashboard Training

The School of Medicine Dean’s Office provides multiple trainings each year geared towards both the PI and the Department administrator audiences. Dean’s Office staff members are available to assist with one-on-one instruction for individual PIs and research administrators.

- Upcoming SOM Research Administration training opportunities

Monthly Expense Report Review and Certification

PIs with active grants or internal subaccounts are required to log in to the PI Dashboard on a monthly basis to review and certify Monthly Expense Reports (MERs).
The review of MERs must be certified within 30 days of the report’s release. Department Chairs are notified via email of all investigators in their Department with MERs between 30 and 60 days past due.

PI’s with any monthly expense report certifications greater than 60 days past due run the risk of their new incoming awards not being processed until the review of all outstanding MERs has been certified in the PI Dashboard.

The Dean’s Office issues a bi-annual memo to both Department Chairs and the Dean notifying them of all investigators with MERs more than 60 days past due.

Primary responsibility for assisting PIs with the review and certification of their MERs lies with the Department and should be an integral part of the required monthly reconciliation process.

**PIs in a Terminated Status**

When a terminated employee is still listed as PI on a grant index and has Monthly Expense Reports that are past due, the School of Medicine will contact the employee’s department and ask that an approver sign-off on PDF copies of the uncertified MERs. Once SOM has a copy of the department-approved expense reports, the electronic copies of the reports will be removed from the Dashboard and will no longer appear as past due.

Departments should work to ensure that no terminated employees are listed as PI on active grant indexes after they have left the University. Please refer to existing faculty exit and grant transfer checklists.

If you already know a terminated employee in your department has uncertified monthly expense reports, please have a department representative certify their review (via signature on PDF copies of expense reports) and email them to SOMRESADMIN@vcu.edu. SOM will then work with the VCU Controller’s Office to have these reports manually dropped from the system.

For more information, please visit our website at the following link:
http://www.medschool.vcu.edu/about/finance/researchadmin/using/