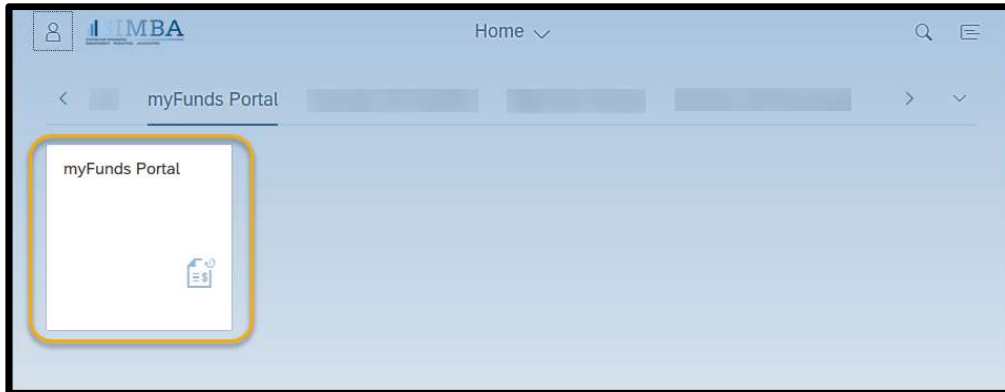# myFunds Portal: Accessing Grant Balances

Log In

1. Log in to SIMBA via the SIMBA website (www.simba.psu.edu) from a web browser. If you are not on a Penn State network, you must connect via the Penn State Virtual Private Network (VPN).
2. Navigate to the myFunds Portal group. Click the myFunds Portal tile.

Prompts

Each report has prompts that are used to filter information. The prompts will vary by report. Prompts with asterisks are required.

Posting Date Prompt

The **Posting Date** is the only **required** prompt. Any date can be entered for the posting date. The **recommendation** is to use the end of the **current fiscal year,** for this example 06/30/2021, along with the **less than or equal to** operator.

1. Select the **Posting Date** from the Prompts Summary.
2. Enter the **Posting Date** using the MM/DD/YYYY format, 06/30/2021. You also have the option to use the calendar icon to select the date.
3. Select the **less than or equal to** operator from the drop-down.
4. Click the **right facing arrow** to move this condition to the prompt area to the right.
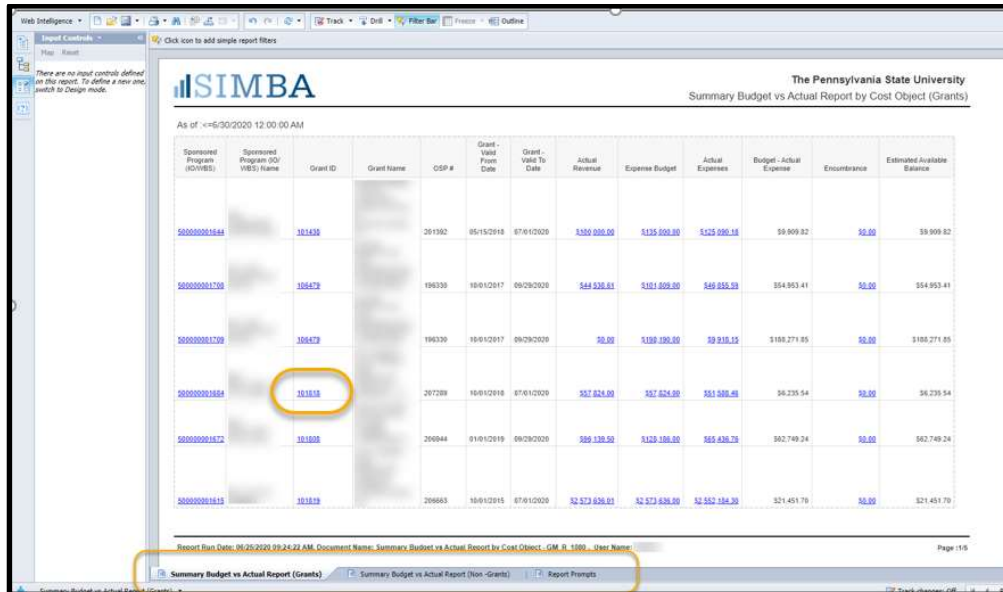5. Click **OK.**
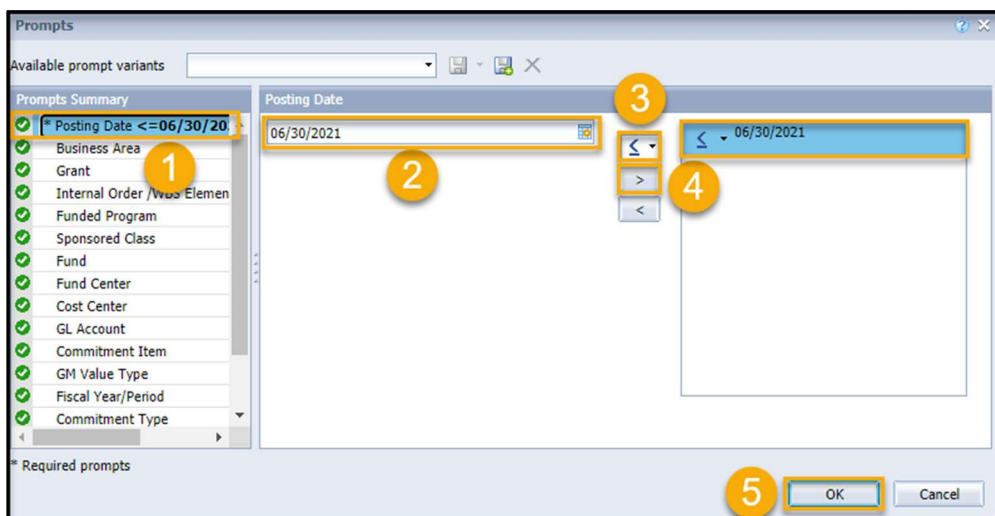
NOTE: The rest of the prompts are optional. The additional prompts can be used to further narrow the data which can be helpful when running reports. For example, you may want to enter a specific grant to look at just those items.

Reporting Tabs

Displayed is the Summary Budget vs Actual Report by Cost Object report. There are three tabs at the bottom left side of the screen; the first is the Summary Budget vs Actual Report for Grants, the second tab is the Summary Budget vs Actual Report for Non-Grants, the third is Report Prompts.
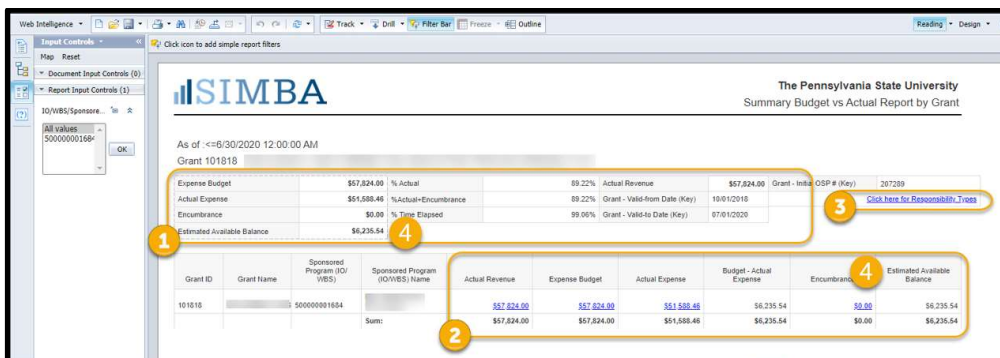
1. Click the **Grant ID** number to view the grant details.

Report Navigation

The report will open in a new browser tab once you click on the Grant ID to view the details.

1. Summary of the Budget vs Actual.
2. Detailed information of Actual Revenue, Expense Budget, Actual Expenses, Budget minus Actual Expenses, Encumbrances, and Estimated Available Balance. Underlined fields are hyperlinks and clicking them will provide detailed information.
3. Responsibility tab which provides detail on the principal and co-principal investigator.
4. Estimated Available Balance.