

An Introduction to the PI Planning Tool

The PI Planning Tool provides an easy way to plan future spending on your project and determine its impact on your final budget. You can add people (salaries), travel, equipment, etc. and it will automatically calculate the benefits, F&A, and budget balances.

The PI Planning Tool starts with your Management Report (which calculates expenses that are past, current, or encumbered). The University 'owns' this data, and it can only be changed through formal processes by your administrative assistant. (This data is black or red.)

Then we added a forecasting tool where you can type in expenses you are planning, but are not yet encumbered. You can add salaries, equipment, travel, etc. Benefits and F&A are automatically calculated. Your forecast total shows you how much YOU are planning to spend. YOU 'own' this data, and can change it at any time. Save it to store for future reference.

From CIS.utah.edu

The screenshot displays a web browser window with the following content:

- Address Bar:** <https://gate.acs.utah.edu/psp/plpr/EMPLOYEE/EMPL/h/?tab=EMPLOYEE>
- Left Sidebar:**
 - University IT**
 - Planview - The project/portfolio information system.
 - NotifyIT - Sign up and receive notifications on IT topics vital to your operations.
 - Administer IRT
 - Research Administration**
 - eProposal
 - eAward Management
 - Cayuse424
 - PI Budget Planning Tool
 - Research Portal 2.0
 - Limited Submission and Intramural Funding
 - Research Administration Training Series
 - SciVal Funding
 - Campus Labs Baseline
 - Human Resource Management**
 - Payroll Reporters**
 - KRONOS Payroll Reporter/Manager
 - Employee Distributions
 - Department Job Summary (D-JOBS)
 - Effort Distribution Report (EDR)
 - ABA (Annualized Base Amount) Computations
 - View PAF (Personnel Action Form)
 - Check Advice Roster
 - Human Resources Information Library
 - HR Department/Org Head Lookup
 - Financial & Business Services**
 - <https://student.apps.utah.edu/uofu/stu/GraduateTracking/>
- Main Content Area:**
 - [Graduate Tracking Faculty Approvals](#)
 - Grading**
 - Enter Grades
 - View Grades
 - Grant Security to Other Employees
 - Grade Check Off List/Status
 - Grading Instructions
 - E-grading Website
 - Student Financials**
 - [Secure department access to view student information](#)
 - Student Tuition History
 - Student Tuition Bills
 - Financial Aid Status
 - Financial Aid Award Letter
 - Graduate Tuition Benefit
 - Graduate Tuition Benefit Report
 - Print A Student's 1098T
 - Scholarship Administration
 - Staff Tuition Payment
 - Non-Matriculated Student Tuition Payment
 - Library Research Tools**
 - E-Reserves / Course Reserves**
 - Marriott Library Course Reserves
 - Find Articles**
 - Marriott Library Research Databases | Health/Medical Databases | Law Databases
 - Find Books, E-Books & Other Materials**
 - University of Utah Libraries Usearch Catalog

Enter Project and Submit

Project: Month: Year:

Business Unit **01** **Orgid- 00065** **Fund-5000**
 Begin Date: 15-Aug-13 End Date: 31-Jul-17 Agency Name: NATIONAL SCIENCE FOUNDATION
PROJECT: 58501832 TATOO ANTENNAS FOR IMPLANTABLE MEDICAL DEVICES
 Award Nbr: 1310642 F&A Rate: 49.00%
 Responsible Person: FURSE, CYNTHIA M **EOR** F&A Base: MTDC
 Awd ProposalID: 10030490 **COST REIMBURSABLE**
 Status: Open-Run Date: Jul 28 2016 03:28 PM

Budget Forecast												
Account Description	Budget	Monthly Rev/Exp	Fiscal Year To Date	Project To Date	Encumbered	Budget Balance	Fringe Rate	Forecasted Balance	2016	2017	20	
40100 CONTRACTS AND GRANTS-FEDERAL	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00			\$0.00	\$0.00	\$0.00	\$0	
**TOTAL Revenue	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0	

This is like your Management Report Plus Forecasting

Management Report

Forecasting

File Edit View History ... Marks Tools Help

Campus Information ... Search Portal ... My Prop... PI Budget Planning Tool

https://finance.app... /index.html?projectId=58501832&n

Save

Budget Forecast

Account Description	Budget	Monthly Rev/Exp	Fiscal Year To Date	Project To Date	Encumbered	Budget Balance	Fringe Rate	Forecasted Balance	2016	2017	2018
40100 CONTRACTS AND GRANTS-FEDERAL	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00			\$0.00	\$0.00	\$0.00	\$0.00
**TOTAL Revenue	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0.00
***TOTAL Revenue & Transfers In	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0.00
50200 FACULTY SALARIES	\$0.00	\$848.84	\$848.84	\$43,702.00	\$2,546.50			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$848.84	\$0.00	\$0.00	\$2,546.50		27.3%	\$2,546.50	\$2,546.50	\$0.00	\$0.00
Faculty Salaries	\$43,875.00	\$848.84	\$848.84	\$43,702.00	\$2,546.50	-\$2,373.50	37.0%	\$15,895.00	\$15,895.00	\$0.00	\$0.00
Faculty Salaries								\$18,441.50	\$18,441.50	\$0.00	\$0.00
50800 OTHER SALARIES	\$0.00	\$0.00	\$0.00	\$35,997.45	\$0.00			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$20,085.00	\$7,725.00	\$12,360.00	\$0.00
53400 HOURLY UNDERGRAD - IC EXEMPT	\$0.00	\$200.00	\$200.00	\$1,175.00	\$420.00			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$200.00	\$0.00	\$0.00	\$420.00		10.3%	\$420.00	\$420.00	\$0.00	\$0.00
Other Salaries	\$64,968.00	\$200.00	\$200.00	\$37,172.45	\$420.00	\$27,375.55		\$420.00	\$420.00	\$0.00	\$0.00
59000 EMPLOYEE BENEFITS	\$0.00	\$249.62	\$249.62	\$15,433.22	\$739.01			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$229.08	\$0.00	\$0.00	\$695.89		27.3%	\$695.90	\$695.90	\$0.00	\$0.00
Names	\$0.00	\$20.54	\$0.00	\$0.00	\$43.12		10.3%	\$43.12	\$43.12	\$0.00	\$0.00
Names	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$180.70	\$69.50	\$111.20	\$0.00
Names	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		37.0%	\$5,881.15	\$5,881.15	\$0.00	\$0.00
Employee Benefits	\$24,922.00	\$249.62	\$249.62	\$15,433.22	\$739.01	\$8,749.77		\$6,800.87	\$6,689.67	\$111.20	\$0.00
*TOTAL Personal Services	\$133,765.00	\$1,298.46	\$1,298.46	\$96,307.67	\$3,705.51	\$33,751.82		\$45,747.37	\$33,276.17	\$12,471.20	\$0.00
60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	\$2,068.52	\$0.00			\$4,500.00	\$4,500.00	\$0.00	\$0.00
Travel-Domestic	\$14,500.00	\$0.00	\$0.00	\$2,068.52	\$0.00	\$12,431.48		\$4,500.00	\$4,500.00	\$0.00	\$0.00

Encumbrances show up in both Management Report and Forecast

File Edit View History Bookmarks Tools Help

Campus Information Services ... | Research Portal | My Prop... | PI Budget Planning Tool | EOR

https://finance.apps.utah.edu/uofu/fin/piplanning/index.html?projectId=58501832&nr

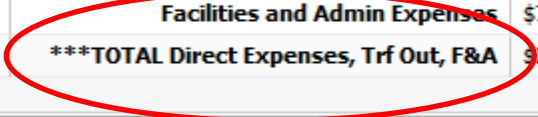
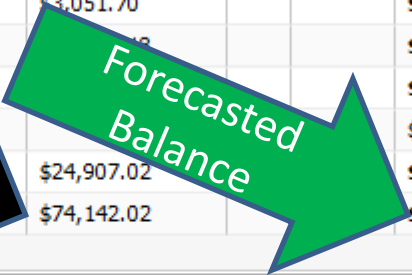
Save

Budget Forecast

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***TOTAL Revenue & Transfers In	\$0.00	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0.00
50200 FACULTY SALARIES	\$0.00	\$848.84	\$848.84	\$2,546.50			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$848.84	\$0.00	\$2,546.50			\$0.00	\$2,546.50	\$0.00	\$0.00
Faculty Salaries	\$43,875.00	\$848.84	\$43,702.00	\$2,546.50	-\$2,373.50	37.0%	\$18,441.50	\$18,441.50	\$0.00	\$0.00
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53400 HOURLY UNDERGRAD - IC EXEMPT	\$0.00	\$200.00	\$200.00	\$420.00			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$200.00	\$0.00	\$420.00		10.3%	\$420.00	\$420.00	\$0.00	\$0.00
Other Salaries	\$64,968.00	\$200.00	\$37,172.45	\$420.00	\$27,375.55		\$420.00	\$420.00	\$0.00	\$0.00
59000 EMPLOYEE BENEFITS	\$0.00	\$249.62	\$249.62	\$739.01			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$229.08	\$0.00	\$695.89		27.3%	\$695.90	\$695.90	\$0.00	\$0.00
Names	\$0.00	\$20.54	\$0.00	\$43.12		10.3%	\$43.12	\$43.12	\$0.00	\$0.00
Names	\$0.00	\$0.00	\$0.00	\$0.00			\$180.70	\$69.50	\$111.20	\$0.00
Names	\$0.00	\$0.00	\$0.00	\$0.00		37.0%	\$5,881.15	\$5,881.15	\$0.00	\$0.00
Employee Benefits	\$24,922.00	\$249.62	\$15,433.22	\$739.01	\$8,749.77		\$6,800.87	\$6,689.67	\$111.20	\$0.00
*TOTAL Personal Services	\$133,765.00	\$1,298.46	\$96,307.67	\$3,705.51	\$33,751.82		\$45,747.37	\$33,276.17	\$12,471.20	\$0.00
60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	\$0.00			\$4,500.00	\$4,500.00	\$0.00	\$0.00
Travel-Domestic	\$14,500.00	\$0.00	\$0.00	\$0.00	\$12,431.48		\$4,500.00	\$4,500.00	\$0.00	\$0.00

Scroll Down to see Totals. Black Numbers in the Balances Mean You have \$ to Spend.

Budget Forecast										
Account Description	Budget	Monthly Rev/Exp	Fiscal Year To Date	Project To Date	Encumbered	Budget Balance	Fringe Rate	Forecasted Balance		
*TOTAL Personal Services	\$133,765.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$96,307.67</u>	\$3,705.51	\$33,751.82		\$45,747.37		
+ 60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	<u>\$2,068.52</u>	<u>\$0.00</u>			\$4,500.00		
Travel-Domestic	\$14,500.00	\$0.00	\$0.00	<u>\$2,068.52</u>	\$0.00	\$12,431.48		\$4,500.00		
+ 62600 LAB AND TECHNICAL SUPPLIES	\$0.00	\$0.00	\$0.00	<u>\$409.30</u>	<u>\$0.00</u>			\$0.00		
Lab and Technical Supplies	\$3,461.00	\$0.00	\$0.00	<u>\$409.30</u>	\$0.00	\$3,051.70		\$0.00		
*TOTAL NonPersonal Services	\$17,961.00	\$0.00	\$0.00	<u>\$2,477.82</u>	\$0.00			\$4,500.00		
**TOTAL Direct Expenses	\$151,726.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$146,614.57</u>	\$3,705.51			\$50,247.37		
+ 89900 FAC. & ADMIN. COSTS-FUND 5000	\$0.00	<u>\$538.24</u>	<u>\$538.24</u>	<u>\$47,614.57</u>				\$0.00		
Facilities and Admin Expenses	\$74,346.00	<u>\$538.24</u>	<u>\$538.24</u>	<u>\$47,614.57</u>		\$24,907.02		\$24,415.41		
***TOTAL Direct Expenses, Trf Out, F&A	\$226,072.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$146,614.57</u>		\$74,142.02		\$74,662.78		

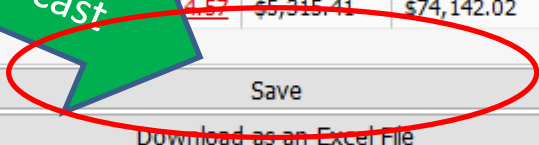
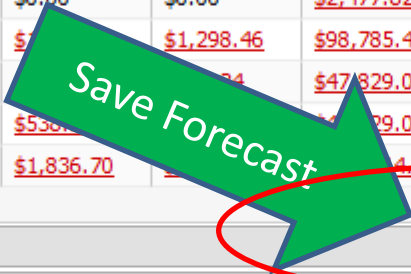


Save

Download as an Excel File

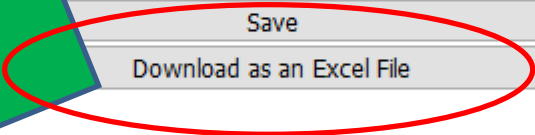
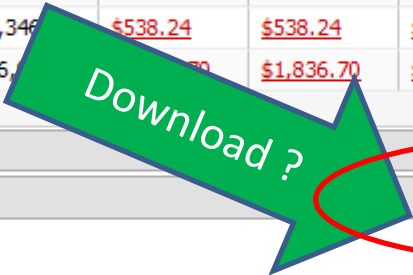
Forecast is not SAVED until you SAVE it

Budget Forecast										
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*TOTAL Personal Services	\$133,765.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$96,307.67</u>	\$3,705.51	\$33,751.82		\$45,747.37		
+ 60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	<u>\$2,068.52</u>	<u>\$0.00</u>			\$4,500.00		
Travel-Domestic	\$14,500.00	\$0.00	\$0.00	<u>\$2,068.52</u>	\$0.00	\$12,431.48		\$4,500.00		
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Lab and Technical Supplies	\$3,461.00	\$0.00	\$0.00	<u>\$409.30</u>	\$0.00	\$3,051.70		\$0.00		
*TOTAL NonPersonal Services	\$17,961.00	\$0.00	\$0.00	<u>\$2,477.82</u>	\$0.00	\$15,483.18		\$4,500.00		
**TOTAL Direct Expenses	\$151,726.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$98,785.49</u>	\$3,705.51	\$49,235.00		\$50,247.37		
+ 89900 FAC. & ADMIN. COSTS-FUND 5000	\$0.00	\$538.70	\$538.70	<u>\$47,829.08</u>	<u>\$1,609.90</u>			\$0.00		
Facilities and Admin Expenses	\$74,346.00	<u>\$538.70</u>	<u>\$538.70</u>	<u>\$47,829.08</u>	\$1,609.90	\$24,907.02		\$24,415.41		
***TOTAL Direct Expenses, Trf Out, F&A	\$226,072.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$146,614.57</u>	\$5,315.41	\$74,142.02		\$74,662.78		
Save										
Download as an Excel File										



You can Download it, just like Management Reports

Budget Forecast										
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Travel-Domestic	\$14,500.00	\$0.00	\$0.00	<u>\$2,068.52</u>	\$0.00	\$12,431.48			\$4,500.00	
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Save										
Download as an Excel File										



Add a New Employee

(Click +, choose existing or new person)

File Edit View History Bookmarks Tools Help

Campus Information Services ... | Research Portal | My Prop... | PI Budget Planning Tool | EOR

https://finance.apps.utah.edu/uofu/fin/piplanning/index.html?projectId=58501832&tr

Save

Budget Forecast

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**TOTAL Revenue	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0.00
***TOTAL Revenue & Transfers In	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00	-\$146,614.57		\$0.00	\$0.00	\$0.00	\$0.00
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Names		\$848.84	\$0.00	\$0.00	\$2,546.50		27.3%	\$2,546.50	\$2,546.50	\$0.00	\$0.00
Faculty Salaries	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		37.0%	\$15,895.00	\$15,895.00	\$0.00	\$0.00
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	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$20,085.00	\$7,725.00	\$12,360.00	\$0.00
New Employee					\$420.00			\$0.00	\$0.00	\$0.00	\$0.00
					\$420.00			\$420.00	\$420.00	\$0.00	\$0.00
					\$420.00	\$27,375.55		\$420.00	\$420.00	\$0.00	\$0.00
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Choose one to continue:

Add row for employee on project

Add row for new employee

Continue

Add a New Employee

Choose a NAME and benefit rate

File Edit View History Bookmarks Tools Help

Campus Information Services ... | Research Portal | My Prop... | PI Budget Planning Tool | EOR

https://finance.apps.utah.edu/uofu/fin/piplanning/index.html?projectId=58501832&tr

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50200 FACULTY SALARIES	\$0.00	\$848.84	\$848.84	\$43,702.00	\$0.00			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	\$848.84	\$0.00	\$0.00	\$0.00		27.3%	\$2,546.50	\$2,546.50	\$0.00	\$0.00
Faculty Salaries	\$43,875.00	\$848.84	\$848.84	\$43,702.00	\$0.00		37.0%	\$15,895.00	\$15,895.00	\$0.00	\$0.00
50800 OTHER SALARIES	\$0.00	\$0.00	\$0.00	\$35,997.45	\$0.00			\$0.00	\$0.00	\$0.00	\$0.00
New Employee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$20,085.00	\$7,725.00	\$12,360.00	\$0.00
Employee: New Graduate Student					\$420.00			\$0.00	\$0.00	\$0.00	\$0.00
Fringe Rate:					\$420.00	\$27,375.55		\$420.00	\$420.00	\$0.00	\$0.00
<input checked="" type="checkbox"/> Insert New Em					\$739.01			\$0.00	\$0.00	\$0.00	\$0.00
FULL TIME FACULTY - 37.00%					\$695.89		27.3%	\$695.90	\$695.90	\$0.00	\$0.00
FULL TIME STAFF - 62.00%					\$43.12		10.3%	\$43.12	\$43.12	\$0.00	\$0.00
POST-DOC W/RETIREMENT - 52.00%					\$0.00			\$180.70	\$69.50	\$111.20	\$0.00
POST-DOC W/NO RETIREMENT - 38.00%					\$739.01	\$8,749.77		\$5,881.15	\$5,881.15	\$0.00	\$0.00
PART TIME NON BENEFITTED - 8.00%					\$3,705.51	\$33,751.82		\$6,800.87	\$6,689.67	\$111.20	\$0.00
60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	\$2,068.52	\$0.00			\$4,500.00	\$4,500.00	\$0.00	\$0.00
Travel-Domestic	\$14,500.00	\$0.00	\$0.00	\$2,068.52	\$0.00	\$12,431.48		\$4,500.00	\$4,500.00	\$0.00	\$0.00

Add a note?

Enter Salary & Name.

Benefits, F&A & Total Autofill

Budget Forecast

Account	Budget	Monthly Rev/Exp	Fiscal Year To Date	Project To Date	Encumbered	Budget Balance	Fringe Rate	Forecasted Balance	2016
40100	\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00			\$0.00	\$0.00
**TOTAL Revenue		\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00		\$0.00	\$0.00
TOTAL Revenue & Transfers In		\$0.00	\$1,836.70	\$1,836.70	\$146,614.57	\$0.00		\$0.00	\$0.00
50200	\$0.00	\$848.84	\$848.84	\$43,702.00	\$2,546.50			\$0.00	\$0.00
	\$0.00	\$848.84	\$0.00	\$0.00	\$2,546.50			\$2,546.50	\$2,546.50
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$15,895.00	\$15,895.00
Faculty Salaries		\$43,875.00	\$848.84	\$848.84	\$43,702.00	\$2,546.50		-\$2,373.50	\$18,441.50
50800	\$0.00	\$0.00	\$0.00	\$35,997.45	\$0.00			\$0.00	\$0.00
New Graduate Student		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	8.0%	\$0.00	\$5,000.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$20,085.00	\$7,725.00
Names		\$0.00	\$200.00	\$200.00	\$1,175.00	\$420.00		\$0.00	\$0.00
	\$0.00	\$200.00	\$0.00	\$0.00	\$420.00			\$420.00	\$420.00
Other Salaries		\$64,968.00	\$200.00	\$200.00	\$37,172.45	\$420.00		\$27,375.55	\$420.00
59000	\$0.00	\$0.00	\$249.62	\$15,433.22	\$739.01			\$0.00	\$0.00
Employee Benefits		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	8.0%	\$0.00	\$400.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$695.89		27.3%	\$695.90	\$695.90
	\$0.00	\$0.00	\$0.00	\$0.00	\$43.12		10.3%	\$43.12	\$43.12
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			\$111.20	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		37.0%	\$5,881.15	\$5,881.15
Employee Benefits		\$24,922.00	\$249.62	\$249.62	\$15,433.22	\$739.01		\$7,131.37	\$7,020.17
*TOTAL Personal Services		\$133,765.00	\$1,298.46	\$1,298.46	\$96,307.45	\$1,175.00		\$51,077.87	\$38,606.67
60000	\$0.00	\$0.00	\$0.00	\$2,068.52	\$0.00			\$4,500.00	\$4,500.00
Travel-Domestic		\$14,500.00	\$0.00	\$0.00	\$2,068.52	\$0.00		\$4,500.00	\$4,500.00
62600	\$0.00	\$0.00	\$0.00	\$409.30	\$0.00			\$0.00	\$0.00
Lab and Technical Supplies		\$3,461.00	\$0.00	\$0.00	\$409.30	\$0.00		\$0.00	\$0.00

Enter Name

Enter New Salary

Benefits Autocalculate

Scroll Down for New Forecast Total. (F&A also autocalculates, shows up below)

Need Another Forecast Year? (e.g., no cost extension year...)

Project Month Year

Expand

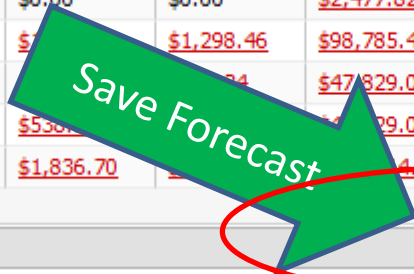
Business Unit **01** [Orgid- 00065](#) [Fund-5000](#) **PROJECT: 58501832 TATOO ANTENNAS FOR IMPLANTABLE MEDICAL DEVICES** Responsible Person **FURSE, CYNTHIA** Awd Proposal **III** **90**

Begin Date **15-Aug-13** End Date **31-Jul-17** Agency Name **NATIONAL SCIENCE FOUNDATION** Award Nbr **1310642** F&A Rate **49.00%** F&A Base- **MTDC** **COST REIMBURSABLE** Status **Open-Run** Date **Jul 28 2016 03:28 PM**

Prefer Month-by-Month? SAVE YOUR DATA FIRST!!!

Lab and Technical Supplies	\$3,461.00	\$0.00	\$0.00	\$409.30	\$0.00	\$3,051.70		\$0.00	\$0.00
*TOTAL NonPersonal Services	\$17,961.00	\$0.00	\$0.00	\$2,477.82	\$0.00	\$15,483.18		\$4,500.00	\$4,500.00
**TOTAL Direct Expenses	\$151,726.00	\$1,298.46	\$1,298.46	\$98,785.49	\$3,705.51	\$49,235.00		\$50,247.37	\$37,776.00
89900 FAC. & ADMIN. COSTS-FUND 5000	\$0.00	\$0.00	\$0.00	\$47,829.08	\$1,609.90			\$0.00	\$0.00
Facilities and Admin Expenses	\$74,346.00	\$5,306.70	\$5,306.70	\$47,829.08	\$1,609.90	\$24,907.02		\$24,415.41	\$18,304.00
***TOTAL Direct Expenses, Trf Out, F&A	\$226,072.00	\$1,836.70	\$1,836.70	\$146,614.57	\$5,315.41	\$74,142.02		\$74,662.78	\$56,080.00

Save



Expand the Year

PeopleSoft session expired | Research Portal | My Prop... | PI Budget Planning Tool | EOR

https://finance.apps.utah.edu/uofu/fin/piplanning/index.html?projectId=58501832&month=7&year=

Project: 58501832 Month: 7 Year: 2016 Submit

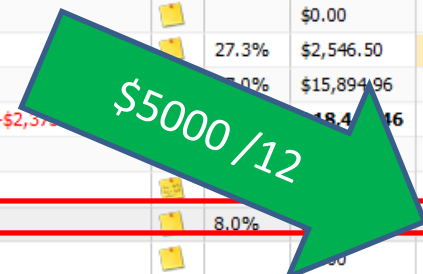
Expand: [Dropdown: 2016 selected] Add Year

Business Unit 01 | Orqid- 00065 | Fund-5000 | PROJECT: 58501832 TATOO ANTENNAS FOR IMPLANTABLE MEDICAL DEVICES | Responsible Person FURSE, CYNTHIA | Award Proposal ID: 90 | COST REIMBURSABLE

Begin Date: 15-Aug-13 | End Date: 31-Jul-17 | Agency Name: NATIONAL SCIENCE FOUNDATION | Award Nbr: 1310642 | F&A Rate: 49.00% | F&A Base: MTDC | Status: Open-Run Date: Jul 28 2016 03:28 PM

Expanded Year has 12 months.

Account Description	Budget	Monthly Rev/Exp	Fiscal Year To Date	Project To Date	Encumbered	Budget Balance	Fringe Rate	Forecasted Balance	2016 (Jan)	2016 (Feb)	2016 (Mar)
40100 CONTRACTS AND GRANTS-FEDERAL	\$0.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$146,614.57</u>	<u>\$0.00</u>			\$0.00	\$0.00	\$0.00	\$0.00
**TOTAL Revenue	\$0.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$146,614.57</u>	<u>\$0.00</u>	<u>-\$146,614.57</u>		\$0.00	\$0.00	\$0.00	\$0.00
***TOTAL Revenue & Transfers In	\$0.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$146,614.57</u>	<u>\$0.00</u>	<u>-\$146,614.57</u>		\$0.00	\$0.00	\$0.00	\$0.00
50200 FACULTY SALARIES	\$0.00	<u>\$848.84</u>	<u>\$848.84</u>	<u>\$43,702.00</u>	<u>\$2,546.50</u>			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	<u>\$848.84</u>	\$0.00	\$0.00	<u>\$2,546.50</u>			\$0.00	\$0.00	\$0.00	\$0.00
Faculty Salaries	\$43,875.00	<u>\$848.84</u>	<u>\$848.84</u>	<u>\$43,702.00</u>	<u>\$2,546.50</u>	<u>-\$2,546.50</u>	27.3%	\$2,546.50	\$0.00	\$0.00	\$0.00
50800 OTHER SALARIES	\$0.00	\$0.00	\$0.00	<u>\$35,997.45</u>	<u>\$0.00</u>			\$15,894.96	\$1,324.58	\$1,324.58	\$1,324.58
Names	\$0.00	\$0.00	\$0.00	\$0.00	<u>\$0.00</u>			\$18,416.16	\$1,324.58	\$1,324.58	\$1,324.58
New Graduate Student	\$0.00	\$0.00	\$0.00	\$0.00	<u>\$0.00</u>		8.0%	\$0.00	\$416.67	\$416.67	\$416.67
53400 HOURLY UNDERGRAD - IC EXEMPT	\$0.00	<u>\$200.00</u>	<u>\$200.00</u>	<u>\$1,175.00</u>	<u>\$420.00</u>			\$0.00	\$0.00	\$0.00	\$0.00
Names	\$0.00	<u>\$200.00</u>	\$0.00	\$0.00	<u>\$420.00</u>		10.3%	\$420.00	\$0.00	\$0.00	\$0.00
Other Salaries	\$64,968.00	<u>\$200.00</u>	<u>\$200.00</u>	<u>\$37,172.45</u>	<u>\$420.00</u>	\$27,375.55		\$420.00	\$0.00	\$0.00	\$0.00
59000 EMPLOYEE BENEFITS	\$0.00	<u>\$249.62</u>	<u>\$249.62</u>	<u>\$15,433.22</u>	<u>\$739.01</u>			\$0.00	\$0.00	\$0.00	\$0.00



Expanded Year has 12 months.

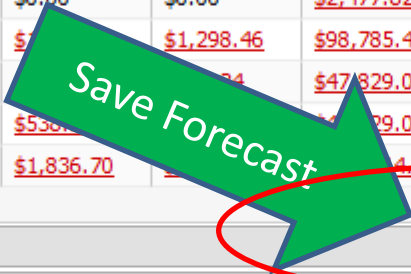
Previous Annual Expenses are Evenly Divided over 12 months.

Once expanded, sorry, we don't have a way to roll it back up yet.
You can add an annual expense on any single month.

You can edit or change anything in the forecast section, to play around and see how changes to your personnel management impact your budget.

Remember to SAVE your Forecast!

	*TOTAL Personal Services	\$133,765.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$96,307.67</u>	\$3,705.51	\$33,751.82			\$45,747.37
+	60000 TRAVEL-DOMESTIC, OUT-OF-STATE	\$0.00	\$0.00	\$0.00	<u>\$2,068.52</u>	<u>\$0.00</u>				\$4,500.00
	Travel-Domestic	\$14,500.00	\$0.00	\$0.00	<u>\$2,068.52</u>	\$0.00	\$12,431.48			\$4,500.00
+	62600 LAB AND TECHNICAL SUPPLIES	\$0.00	\$0.00	\$0.00	<u>\$409.30</u>	<u>\$0.00</u>				\$0.00
	Lab and Technical Supplies	\$3,461.00	\$0.00	\$0.00	<u>\$409.30</u>	\$0.00	\$3,051.70			\$0.00
	*TOTAL NonPersonal Services	\$17,961.00	\$0.00	\$0.00	<u>\$2,477.82</u>	\$0.00	\$15,483.18			\$4,500.00
	**TOTAL Direct Expenses	\$151,726.00	<u>\$1,298.46</u>	<u>\$1,298.46</u>	<u>\$98,785.49</u>	\$3,705.51	\$49,235.00			\$50,247.37
+	89900 FAC. & ADMIN. COSTS-FUND 5000	\$0.00	\$0.00	\$0.00	<u>\$47,829.08</u>	<u>\$1,609.90</u>				\$0.00
	Facilities and Admin Expenses	\$74,346.00	<u>\$538.44</u>	<u>\$538.44</u>	<u>\$47,829.08</u>	\$1,609.90	\$24,907.02			\$24,415.41
	***TOTAL Direct Expenses, Trf Out, F&A	\$226,072.00	<u>\$1,836.70</u>	<u>\$1,836.70</u>	<u>\$144,574.57</u>	\$5,315.41	\$74,142.02			\$74,662.78
Save										
Download as an Excel File										



Questions?

Please contact for assistance:

afs@utah.edu