Using the PI Budget Planning Tool for Projecting Future COVID-19 Related Expenses

The PI Budget Planning Tool, which is accessed through Campus Information Systems (CIS), allows University of Utah researchers to input data about projected losses on their projects due to disruption caused by COVID-19 and the related University shutdown.

The budget data is pre-populated with sponsored project data such as project payroll and other expenses. For each project, the researcher can indicate the anticipated costs that may include, but are not limited to, the following:

- Purchase of personal protective equipment (PPE)
- Reestablishing experiments or project progress
- Enrolling and retaining patients or participants
- Difficulty or inability maintaining lab activity and/or maintaining animals
- Cancellation of meetings and conferences and/or travel restriction
- Equipment or other costs associated with working remotely
- Personnel incapacitated due to illness, unable to access lab/facilities, or other challenges
- Other financial, human subject, animal related impacts or unusual expenses

Gauging financial impact for each grant gives researchers the information to better respond to federal agencies’ specific questions. The tool can also support researchers in requesting project extensions and supplement funding.

For questions about this guide or the Planning Tool, please contact askosp@osp.utah.edu
Follow these simple steps to use the PI Budget Planning Tool:

1. Login to Campus Information Systems (CIS)

2. Search for and select the PI Budget Planning Tool, as shown below.
3. Enter the project number, month and year. Hit the ‘Submit’ button.
   Note: Access to project information is based on existing Management Report security.

4. Select an existing expense line and click on the out year to add projected additional expenses.
5. To add an additional expense (not related to personnel), click on the green + button on the left-hand side to add a field. The new row will be created and you will be able to add expenses.

6. To add new personnel, click on the green + button on the left-hand side. A dialog box will appear giving you the option to either: 1) Add a row for an existing employee on the project, or; 2) Add a row for a new employee.
For this example, we have selected ‘Add a row for a new employee’ who we are calling Sasha Lake. Once selected, this dialog box will appear and prompt you to fill-in information about the new employee including their fringe benefit rate.

After you click ‘Continue’, you will see your new employee rows have been added.
7. After scrolling to the bottom of the Planning Tool, you will see your new projected cost totals.

As you make changes, the PI Budget Planning Tool will instantaneously update your projected budget. You can immediately see your new projected budget for the selected year.

But to save these projections, you will want to SAVE in the Planning Tool for future reference. Please note that you can only save one forecast per project in the Planning Tool.

If you’d like further analysis, you can click the ‘Download to Excel File’ button to import your data in Microsoft Excel.