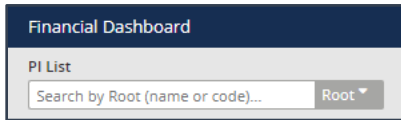


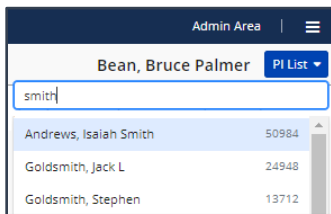
Navigate to Account Card Personnel Encumbrances

Go to the page for the Principal Investigator (PI)

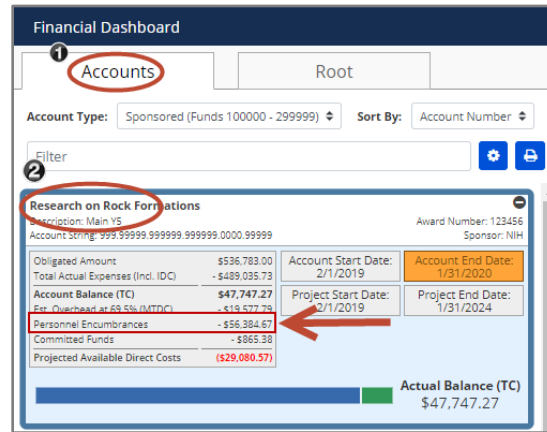
From the landing page:
search or select the PI's name



Or, from another root:
click the PI list button and search or select the PI's name



Click **Accounts** tab, select the account card you want to view (click the plus on the upper right hand corner to expand the card to see the Personnel Encumbrance line)



Account Card Personnel Encumbrances

Explanation of Calculations

The account card in general is a to-date view of Obligated amount and expenses. The Personnel Encumbrances are also a to-date view using the person's current costing distribution and salary from PeopleSoft projected to the account end date. Sponsored accounts use the GMAS account end date. Non-sponsored accounts use either the HU Fiscal Year End (this date doesn't appear on the account card) or the manually entered date (this date does appear on the account card).

In order to get a to-date picture:

- We back out from the current month's projection any salary that has hit the GL, and fully project the salary for future months.
 - 6140 and 6440 are monthly salaries which hit the GL at the beginning of the month so those object codes are excluded for the current month's calculation. The object codes are included in future projected months though.
 - If a weekly or biweekly salary has hit the GL for the current month we only include the remaining pay periods in the calculation. The full pay periods are used for future projected months.
- We include both salary and associated fringe.

Please Note

- The Personnel Encumbrances are a to-date view using current costing distribution and salary from PeopleSoft, which is not the same as the Account or Root reports which use costing from the last closed month and incorporate user entered projections to project personnel expenses.
- The PI Dashboard doesn't know about a person's termination date in advance, the application will only stop projecting a person once their termination date is the current date.
- After the account end date has passed, there will be no projections (even if people are still costed to the account).
- The projection doesn't include 6040 supplemental salary.