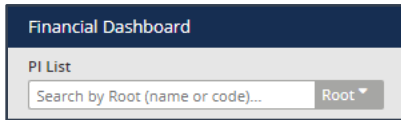


## Navigate to Account Summary Stats

Go to the page for the Principal Investigator (PI)

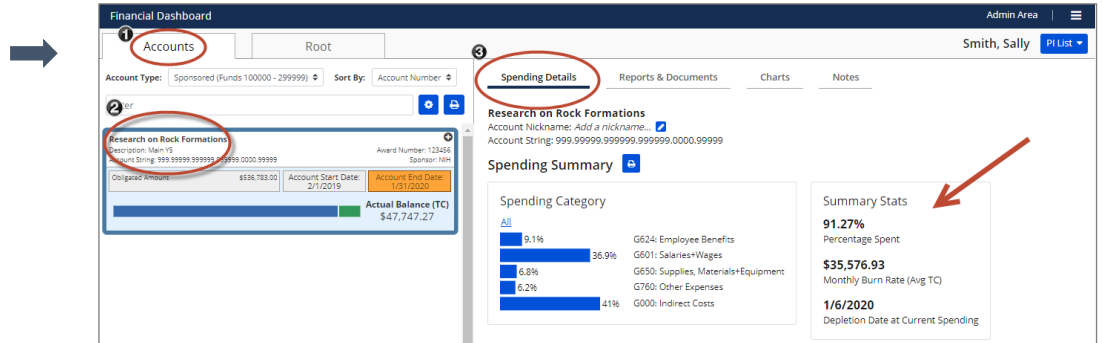
From the landing page:  
search or select the PI's name



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, **Spending Details** will be selected by default



## Account Summary Stats Calculations

This document details the formulas for calculating the Summary Stats in the PI Dashboard. The Summary Stats includes:

- Percentage Spent
- Monthly Burn Rate (Avg. TC)
- Depletion Date at Current Spending

## Account Summary Stats Calculations

### Percentage Spent

This is the percentage spent on the account to-date. Below are the formula's used in the calculations.

#### Sponsored Accounts

Formula 
$$\frac{\text{Total Actual Expenses (incl. IDC) + Committed Funds}}{\text{Obligated Amount}}$$

Numbers found  
on  
account card

|                                   |                |
|-----------------------------------|----------------|
| Obligated Amount                  | \$369,971.00   |
| Total Actual Expenses (Incl. IDC) | - \$334,681.70 |
| Committed Funds                   | - \$1,547.13   |

Example 
$$\frac{\$334,681.70 + \$1,547.13}{\$369,971} = 90.88\%$$

Summary Stats

**90.88%**  
Percentage Spent

#### Non-Sponsored Accounts

Formula 
$$\frac{\text{Total Actual Expenses (incl. IDC)}}{\text{Balance Forward + Income + Non Operating}}$$

Numbers found  
on  
account card

|                 |               |
|-----------------|---------------|
| Balance Forward | \$100,000.00  |
| Income          | + \$50,000.00 |
| Expense         | - \$5,494.04  |
| Non-Operating   | + \$0.00      |

Example 
$$\frac{\$5,494.04}{\$100,000 + \$50,000 + \$0} = 3.66\%$$

Summary Stats

**3.66%**  
Percentage Spent

## Account Summary Stats Calculations

### Monthly Burn Rate (Avg. TC)

This is the account's monthly average spending from the date expenses were first charged to today (since the formula uses the current date there will always be a burn rate displayed even if there are no current expenses on the account). Please note the burn rate used on the Account and Root reports are not calculated in the same way as the Summary Stats, so they should not be compared.

The PI Dashboard uses milliseconds for the date comparison in this formula, which is complicated to calculate, so we'll be using days in our example below (which gets you very close).

Helpful tip: To calculate the number of days between two dates you can enter the dates in excel and subtract them.

#### Sponsored Accounts

Formula 
$$\frac{\text{Total Actual Expenses (incl. IDC)}}{\text{Number of months (from account start date to today)}}$$

Numbers found  
on  
account card

|                                   |                |                     |           |
|-----------------------------------|----------------|---------------------|-----------|
| Total Actual Expenses (Incl. IDC) | - \$334,681.70 | Account Start Date: | 12/3/2015 |
|-----------------------------------|----------------|---------------------|-----------|

$$\frac{\$334,681.70}{48.5*} = \$6,900.65^{**}$$

Example \*Nov 27, 2019 – Dec 3, 2015 = 1455 days / 30 days per month = 48.5 months  
 \*\* As noted above since we are using days in our example and PI Dashboard uses milliseconds, the calculations will be close but not exact.

Summary Stats

**\$6,899.50**

Monthly Burn Rate (Avg TC)

#### Non-Sponsored Accounts

Formula 
$$\frac{\text{Total Actual Expenses (incl. IDC)}}{\text{Number of months (July 1 of current HU FY to today)}}$$

Numbers found  
on  
account card

|         |               |
|---------|---------------|
| Expense | - \$40,542.58 |
|---------|---------------|

$$\frac{\$40,542.58}{3.0666667*} = \$13,220.41^{**}$$

Example \*Oct 1, 2020 - July 1, 2020 = 92 days / 30 days per month = 3.066667 months

Summary Stats

**\$13,220.41**

Monthly Burn Rate (Avg TC)

## Account Summary Stats Calculations

### Depletion Date at Current Spending

This is the date the account balance will be spent down to \$0, using the monthly burn rate average since the account's start date.

#### Sponsored Accounts

Formula 
$$\text{Account start date} + \frac{\text{Obligated Amount}}{\text{Monthly Burn Rate Avg. (TC)}} \times 30 \text{ days}$$

Numbers found on account card & Summary Stats

|                  |              |                     |          |
|------------------|--------------|---------------------|----------|
| Obligated Amount | \$686,731.00 | Account Start Date: | 7/1/2016 |
|------------------|--------------|---------------------|----------|

|                            |
|----------------------------|
| Summary Stats              |
| <b>\$8,025.05</b>          |
| Monthly Burn Rate (Avg TC) |

Example 
$$\text{July 1, 2016} + \left( \frac{\$686,731}{\$8,025.05} \times 30 \text{ days} \right) = \text{July 12, 2023} *$$

\* Using excel can be helpful here  $(686,731/8,025.05) \times 30 = 2,567.02$  adding that number to the date 7/1/2016 in excel gives you 7/12/2023

|                                    |
|------------------------------------|
| Summary Stats                      |
| <b>7/12/2023</b>                   |
| Depletion Date at Current Spending |

#### Non-Sponsored Accounts

Formula 
$$\text{July 1 current HU FY} + \frac{\text{Balance Forward} + \text{Income} + \text{NonOperating}}{\text{Monthly Burn Rate Avg. (TC)}} \times 30 \text{ days}$$

Numbers found on account card & Summary Stats

|                 |                |
|-----------------|----------------|
| Balance Forward | \$592,342.13   |
| Income          | + \$119,462.03 |
| Non-Operating   | + \$0.00       |

|                            |
|----------------------------|
| Summary Stats              |
| <b>\$13,220.41</b>         |
| Monthly Burn Rate (Avg TC) |

Example 
$$\text{July 1, 2020} + \left( \frac{\$592,342.13 + \$119,462.03 + \$0.00}{\$13,220.41} \right) \times 30 \text{ days} = \text{Dec 2, 2024} *$$

\* Using excel can be helpful here  $(592,342.13+119,462.03)/13,220.41 \times 30 \text{ days} = 1615.24$  adding that number to the date 7/1/2020 in excel gives you 12/2/2024.

|                                    |
|------------------------------------|
| Summary Stats                      |
| <b>12/2/2024</b>                   |
| Depletion Date at Current Spending |