Instructions for Completing Form 4

This Form is to be used for Institute/Center Annual Reports.

General Information
I/C Code: Leave blank. DCF staff will complete.
I/C Name: List the name of the Institute/Center as it appears in official documents.
Prepared By: Provide the name and title of the individual completing this form.
Date: List the date on which this form was prepared.
Telephone: List the telephone number of the individual preparing the form.

Actual Expenditures for the Institute/Center
➢ As part of the annual report, list the actual expenditures for the previous fiscal year. Include any funds that were expended out of other University or State University System units. Overhead should be reported only if it was an indirect cost expended directly out of the Institute/Center budget.
➢ Budgetary Unit: Specify if Institute/Center funds pertained to University E&G, UF’s IFAS, or UF’s Health Science Center. If funds came from more than one of these categories—e.g., IFAS and E&G—complete a separate form for each.
➢ Specify all actual expenditures (Salaries & Benefits, Other Personal Services, Expenses, Operating Capital Outlay, and Total Actual Expenditures) that came from each of the following budget categories:
➢ SUS Appropriated Funds
➢ Contracts & Grants
➢ Fees for Services (Auxiliary)
➢ Private & Other (Gifts, Donations, Endowments - Specify)

Salaries & Benefits: List actual expenditures reported under PeopleSoft accounts 600000 - 649999 (Faculty; TEAMS; University Support Personnel Services).

Other Personal Services: List actual expenditures reported under PeopleSoft accounts 650000 - 699999. Break out OPS expenditures as either OPS-Housestaff (applies to Medical Housestaff at UF), OPS-Graduate Assistants, or OPS-Other.

Expenses: List actual expenditures reported under PeopleSoft accounts 700000 - 749999.

Operating Capital Outlay: List actual expenditures reported under PeopleSoft accounts 780000 – 789999.

Total Actual Expenditures: Sum each column under each budget category.

Positions and Rate
➢ List all actual positions in personyears. To determine personyears, divide the number of months a position was contracted to work by 12 months and then multiply by the FTE. For example:
➢ One full-time 12-month position equals 1.00 personyear (12-month contract/12 months * 1.00 FTE = 1.00 personyear).
➢ One full-time 9-month position equals .75 personyear (9-month contract/12 months * 1.00 FTE = .75 personyear).
➢ One half-time 9-month position equals .375 personyear (9-month contract/12 months *.50 FTE = .375 personyear).

Faculty Positions: List the number of actual Faculty personyears allocated to the Institute/Center from each budget category (SUS Appropriations; Contracts & Grants; Fees for Services; Private & Other; and Total).

TEAMS and USPS Positions: List the number of actual Other non-OPS personyears allocated to the Institute/Center from each budget category.

Total Positions: List the total number of actual personyears allocated to the Institute/Center from each budget category.

Sum of Salary Rates Associated with Institute/Center Positions
➢ Rate is the base salary for a position on an annualized basis. Benefits are not included. Include rate for any vacant positions.

Sum of Salary Rates for These Faculty Positions: Sum the salary rates associated with all actual Faculty positions.

Sum of Salary Rates for These TEAMS and USPS Positions: Sum the salary rates associated with all actual TEAMS and USPS positions.

Sum of Salary Rates for Faculty, TEAMS, and USPS Positions: Total the sums from the previous two.