

Annual Reporting

**e-TRAC
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**Line item
Identification
and eligibility**

Forecast Plus

RSO Review

- PI/RSO
- Purchasing documents
- Construction cost update
- Deadline first Friday in May

- Review expenditures to date
- Forecast remaining amount
- end date extensions
- variances
- new items

- Annual summary
- Confirm Lab Space
- Review Document Retention Policy
- Provide Outcomes Report

- CFI financial report submitted
- Internal deadline May 31, 2018

- CFI financial report online
- CFI financial report sent to PI

Financial Summary spreadsheet

- Summarizes the project's financial status
- The format mimics the CFI report
- Researchers can request an updated version at anytime

