



INDIANA UNIVERSITY

UNIVERSITY BUDGET OFFICE

2023-24 Draft Operating Budget Calendar

Due date

Sept. 26, 2022	Send to campuses – post to website <ul style="list-style-type: none">• DRAFT Budget Construction processing schedule
Dec. 1-2, 2022	Trustee meeting – IU Indianapolis
Dec. 5, 2022	5-year Budget Model Portal Opens (Closes – Feb. 1, 2023) Open Fee Portal/Non-Instructional Fee Request Application (Closes – Feb. 1, 2023) <ul style="list-style-type: none">▪ Fee portal adjustments pending President’s approval of Academic Tuition & Fee Task Force Recommendations
Dec. 12, 2022	Request from campuses: <ul style="list-style-type: none">• Identification of base transfers, anticipating reorgs (due Jan. 13, 2023) Request from Risk Management <ul style="list-style-type: none">• Fire and casualty insurance usage and cost rates (due March 3, 2023) Request from Investment and Debt Management: <ul style="list-style-type: none">• Debt service obligations (due Mar. 3, 2023)
Jan. 13, 2023	Receive from campuses: <ul style="list-style-type: none">• Identification of all base transfers anticipating any reorganization or reallocation plans
Feb. 1, 2023	5-year Budget Model Portal Closes & Narratives Due Close Fee Portal/Non-Instructional Fee Request Application
Feb. 2-3, 2023	Trustee Meeting – IU East
Feb. 6, 2023	Credit Hour Projector available (Close Application April 14, 2023) Open INC INC Application (Closes – April 14, 2023) Fee portal remains open for changes to GRAD/PROF/DE/Mandatory/Program Differential fees remain open for editing Send to campuses: <ul style="list-style-type: none">• Energy and Utilities Actuals for budget planning
Mar. 3, 2023	Receive from Risk management: <ul style="list-style-type: none">• 2023-24 Fire and Casualty Insurance Rates Receive from Investment and Debt Management: <ul style="list-style-type: none">• Debt service obligations
Mar. 13, 2023	Begin President’s Budget Conferences - end March 31 st



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- Mar. 20, 2023** Request from Office of Research Administration:
- **Contracts & Grants expenditure projections (due April 21st)**
- Mar. 20, 2023** Budget construction environment and tables created (“Genesis”)
Org and account changes to Alicia for BC Updates
- April 3, 2023** ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier
- April 14, 2023** Close Applications
- **2023-24 non-instructional fee income and other incidental (INC INC)**
 - **Credit Hour Projector**
- April 17, 2023** SYSTEM FREEZE - base budget for detailed budget construction (base column of BA is grayed out)
- **Any Outstanding Budget Adjustments will be cancelled**
 - **Populate Benefit Rates/Reason Codes**
 - **INC INC Loaded to Budget Construction**
- April 18, 2023** Budget pushed down to chart level/Detailed budget construction available
- Send to campuses:
- **DRAFT Guidelines – Official Salary Policy/University Assessments/Guidelines**
 - **DRAFT University Administration Targets (UA Units)**
 - **FY2024-25 Budget Templates Distributed**
- April 21, 2023** Receive from Office of Research Administration:
- **Contracts & Grants expenditure projections**
- May 5, 2023** Finalized Guidelines – Official Salary Policy/University Assessments/Guidelines
Finalized University Administration Targets (UA Units)
- May 26, 2023** Regional Campus/UA Budgets pulled to IU-UNIV
Campus Review of Budgets
- **Budget Narratives due**
 - **Union negotiations complete**
 - **FY2025 Budget Projections Due**
- May 30, 2023** Detailed Budget Construction ends; no changes without UBO approval
- **Budgets pulled to IU-UNIV level – Snapshot taken**
 - **No level changes**
 - **FY2025 Budget Projections Due**



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May 31, 2023	Test Union Export/Import
TBD	BOT Tuition Forum <ul style="list-style-type: none">• Tuition & Fee Rates for 2024-25 presented for approval
June 2, 2023	Pre-Test Payroll Load (edit check cleanup)
June 5, 2023	KFS/People Soft STG Refresh (early morning) Test payroll (6pm)
June 7, 2023	Production Union Export/Import
June 8-12, 2023	Production Union Rebalancing
June 15-16, 2023	Trustee meeting – IU Bloomington <ul style="list-style-type: none">• FY2024 Budget presented for BOT approval
June 15, 2023	Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode, Salary Load in Audit Mode
June 16, 2023	Budget and salary loads, Update Mode
June 19, 2023	Budget pushed down to Campus level
Week of June 19, 2023	Departmental work papers available
June 20, 2023	July 1 Archive