Due date

Sept. 23, 2019 Send to campuses – post to website
• DRAFT Budget Construction processing schedule

Oct 3-4, 2019 Trustee meeting – IUPUI

Oct 24, 2019 Send to campuses 5 Year Budget Model

Oct. 28, 2019 Request from Andrea - University Institutional Research & Reporting:
• Fall Enrollment Study

Nov. 4, 2019 Request from Campuses Budget Reallocation and New Revenue Summary

Dec. 5-6, 2019 Trustee meeting – IU East

Dec. 9, 2019 Request from Risk Management
• Fire and casualty insurance usage and cost rates (due March 6, 2020)

Request from campuses:
• Identification of all base transfers anticipating any reorganization or reallocation plans (due Jan. 17, 2020)

Dec. 10, 2019 Receive from Campuses 5 Year Budget Model

Dec. 13, 2019 Receive from Campuses Budget Reallocation and New Revenue Summary

Request from Investment and Debt Management:
• Debt service obligations (due Mar. 6, 2020)

Receive from Andrea - University Institutional Research & Reporting:
• Fall Enrollment Study

Jan. 17, 2020 Receive from campuses:
• Identification of all base transfers anticipating any reorganization or reallocation plans

Feb. 3, 2020 Publish to Web/Open for access
• 2019-20 non-instructional fee income and other incidental income (INC INC) REVIEW – ONLY EXCEPTIONS TO BE UPDATED (close Application March 27, 2020)
• Credit Hour Projector available (due March 27, 2020)
Feb. 3, 2020  Send to campuses:  
  • Energy and Utilities Actuals for budget planning

Feb. 13-14, 2020  Trustee Meeting – IUPUI

Feb. 21, 2020  Send to campuses:  
  • Salary Policy and Benefit Rates

Mar. 6, 2020  Receive from Risk Management:  
  • 2020-21 Fire and casualty insurance rates

Receive from Investment and Debt Management:  
  • Debt service obligations

Mar. 9, 2020  Request from Office of Research Administration:  
  • Contracts & Grants expenditure projections (due April 10th)

Send to campuses:  
  • Fire and Casualty Insurance usage and costs estimates

Budget construction environment and tables created (“Genesis”)  
Org and account changes to Alicia for BC Updates

Mar. 23, 2020  ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier

Mar. 27, 2020  Receive from campuses:  
  • 2020-21 Close Credit Hour Projector  
  • EXCEPTION INC INC w/updates– close application

Week of Mar. 30, 2020  System freeze - base budget for detailed budget construction (base column of BA is grayed out)

Load INC INC  
Populate benefit rates/reason codes  
Budget pushed down to chart level/Detailed budget construction available

April 3, 2020  Send to campuses:  
  • University Fiscal Analysis Template  
  • Guidelines  
  • University Administration Targets (UA Units)

April 9-10, 2020  Trustee meeting – IU South Bend
April 10, 2020
Receive from Office of Research Administration:
• Contracts & Grants expenditure projections

May 13, 2020
Budgets at Campus Level – Regional Campus/UA Budgets at IU-UNIV
Union negotiations completed
Begin Budget Presentation materials for BOT meeting

May 20, 2020
Detailed Budget Construction ends; no changes without UBO approval
• Budgets pulled to IU-UNIV level – Snapshot taken
• No level changes
• Budget Narratives Due

Receive from Campuses:
• University Fiscal Analysis – Updated Uses of Reserves (Must Due Items)

May 28, 2020
Finalize Budget Presentation materials for BOT Meeting

June 2, 2020
Test Union Export

June 8, 2020
STG Refresh (needs verified)

June 9, 2020
Union Export – Union Import, rebalancing

June 10, 2020
Test payroll/BCAF load extract

June 11-12, 2020
Trustee meeting – IU Bloomington
Approval of 2020-21 Operating Budget

June 18, 2020
Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode,
Salary Load in Audit Mode

June 19, 2020
Budget and salary loads, Update Mode

Week of June 22, 2020
Departmental workpapers available

June 22, 2020
Budget pushed down to Campus level

June 23, 2020
July 1 Archive

Spring Break:
Blooming (BL) March 15-22 Kokomo (KO) March 15-22
East (EA) March 15-22 Northwest (NW) March 15-22
IUPUI (IN) March 15-22 South Bend (SB) March 15-22
Southeast (SE) March 15-22