Fiscal Year 2023 BTA Instructions

General Information:

- BTA information can be accessed [here](http://sites.udel.edu/budget/home/staff-and-contacts/).
- FY2023 Budget Turnaround (BTA) screens must be submitted to the Budget Office by the College/Unit’s final approver by **August 31st, 2022**.
- Below are the BTA-supported browsers

![Desktop access requirements](image1.png)

- FY2023 has been pre-populated with prior fiscal year (FY2022) budget information.
- Actuals information includes FY2020, FY2021, and FY2022 as of the May 31st month-end close.
- FY2023 all-funds BTA budgets should be developed at the department level
  - All department level plan files, both Labor & Budget must be approved by College/Unit’s final approver
  - Salary categories (Professional, Faculty, S-Contracts, Salaried Staff, Graduate Stipend, Wages,...) are budgeted using the “Labor Planning” section
  - Revenue and Other expense categories are budgeted using the “Budgeting” section

![Mobile access requirements](image2.png)

- Be sure to budget in a way that is reflective of actual activity.
- Transfers, Allocations, and Debt Service must be budgeted using the appropriate account.

General assumptions:

- Tuition Increase ( Resident & Non-Resident) 3.0%

<table>
<thead>
<tr>
<th>Benefit Rates</th>
<th>Internal</th>
<th>External</th>
<th>Federal AG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty and Professionals - Exempt</td>
<td>42.7%</td>
<td>39.1%</td>
<td>31.4%</td>
</tr>
<tr>
<td>Staff – Non Exempt</td>
<td>70.3%</td>
<td>75.1%</td>
<td>56.0%</td>
</tr>
<tr>
<td>Graduate Students</td>
<td>9.0%</td>
<td>13.1%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Other</td>
<td>8.0%</td>
<td>7.9%</td>
<td>7.9%</td>
</tr>
</tbody>
</table>

- Position budgeting is based on salary information as of 5/31/2022 and includes 3% general salary adjustments.
- Position salary distribution is based on current LAM distribution as of 5/31/2022.
- Salary Offload:
  - Salary offload is being automatically calculated through the salary distributions of position planning.
  - For units needing to budget additional salary offload at a summary level, please use 120298 (professional offload) or 121198 (faculty offload) in the S-Contract section of the “Other Labor” tab
  - 120298 – 121198 salary offload budgets should net to $0 across fund types.
- Refer to the [PS Account Budgeting Reference List](http://sites.udel.edu/budget/home/staff-and-contacts/) for recommended accounts to use.

If you have specific questions regarding your budgets, please email your Budget Analyst. Contact information is on our web site at: [http://sites.udel.edu/budget/home/staff-and-contacts/](http://sites.udel.edu/budget/home/staff-and-contacts/). If you encounter any technical problems with the BTA Online System, please contact [wf-budgetofficebta@udel.edu](mailto:wf-budgetofficebta@udel.edu). We need to be aware of any problems or concerns and welcome your questions.
Basic Budget (11 fund type)
• Budget by individual departments, and purpose codes
• Non-UBDM units: FY2023 central support (1SUPPT) amount has been pre-populated based on FY23 unit templates distributed to President, Provost and EVP
• UDBM Units: FY2017 predictable base and FY2023 UDBM incremental revenue budget information is being finalized and not pre-populated

Self-Supporting (21 fund type)
• Budget by individual departments, and purpose codes
• Individual self-supporting operations must net to $0 - use the appropriate year-end sweep account (199721 for intra-fund year-end sweep such as a 2-1 to a 1-7 reserve or 199821 for inter-fund year-end sweep such as a 2-1 to a 8-5 reserve) as a balancing tool.

Allocated (17 fund type)
• Each department has a unique budget holding purpose (eg DISA1777__)
• Includes summary historical information from individual 17 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool

Service Centers (18 fund type)
• Each department has a unique budget holding purpose (eg DBIO1877__)
• Includes summary historical information from individual 18 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool

Faculty Startup (19 fund type)
• Each department has a unique budget holding purpose (eg ENTO1977__)
• Includes summary historical information from individual 19 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool

Gifts (41 fund type)
• Each department has a unique budget holding purpose (eg MASC4177__)
• Includes summary historical information from individual 41,45 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool

Endowment (46 fund type)
• Each department has a unique budget holding purpose (eg SCHL4677__)
• Includes summary historical information from individual 46,47 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool

State Restricted (22 fund type)
• Budget by individual departments, and purpose codes
• Revenue and expense must net to $0 in each purpose code
• FY2023 state appropriation revenue amount has been carried over from FY2022 Budget and may need to be updated with updated FY2023 State budget changes.

Sponsored (31 fund type)
• Each department has a unique budget holding purpose (eg PHYS3177__ or AGRI3A77__)  
• Includes summary historical information from individual 3A, 31-37,42,43 purpose codes 
• Revenue and expense must net to $0 in each purpose code

Capital (85 fund type)
• Each department has a unique budget holding purpose (eg RNOV8577__)
• Includes summary historical information from individual BLDG,85 purpose codes
• Budget must net to $0 – use account 1MRGIN as a balancing tool