BTA Budget Target Explanation for Group, Calculated, & New Perm Budget Totals

Expense Group Summary Screen:

Group Budget Target – the next fiscal year’s budget target for the entire unit

New Perm Budget Total

- Before any changes are made to the purpose detail screens, this amount will be the current year’s total permanent budget
- After changes are made to the purpose detail screens, this amount will reflect those changes
- The ‘New Perm Budget Total’ should EQUAL the ‘Group Budget Target’ when BTA is completed and before it is sent back to the Budget Office

Purpose Summary Screen:

Group Budget Target – the next fiscal year’s budget target for the entire unit

Calculated Budget Target – Initially equals the current year’s total permanent budget

- This field can be adjusted by purpose or by department if the owner of the unit would like to distribute a portion of the group budget target to their departments
- The owner can send those purposes with the new calculated budget targets to those departments for them to budget each purpose
- When a calculated budget target is entered for a department or a purpose, it will update the ‘Calculated Budget Target Total’ located on the top right portion of the screen
- If the ‘Calculated Budget Target’ was not updated on the purpose summary screen before sending to the department, the department will see their current year’s budget as the budget target for the next fiscal year
- After all department changes are made and sent back to the appropriate approver, the ‘Calculated Budget Target Total’ should EQUAL the ‘New Perm Budget Total’

New Perm Budget Total – Initially equals the current year’s total permanent budget

- As changes are made to the ‘new perm budget’ on the purpose detail screens, the ‘New Perm Budget Total’ located on the top right portion of the screen is updated
- After all changes are made, the ‘New Perm Budget Total’ should EQUAL the ‘Group Budget Target’

Only if the owner decides to update the Calculated Budget Targets to send to departments will the ‘Calculated Budget Target Total’ located on the top right portion of the screen change and equal both the ‘Group Budget Target’ and the ‘New Perm Budget Total’.

Otherwise, only the ‘Group Budget Target’ and the ‘New Perm Budget Total’ will need to be EQUAL before approving and sending back to the Budget Office.