Business Forum

Wednesday, May 10, 2017
10 a.m. - 12 p.m.
Baker University Center 240
Agenda

• Partner Group Updates
• Compensation Partner Group
• Payroll Partner Group
• Employee Service Center Partner Group
• Budget Partner Group
• Key Announcements
Original Structure

RC Strategy Group
Co-Chairs: Deb Shaffer & Heather Krugman

RC Administrative Technical Group
Co-Chairs: Julie Allison, Emily Chapman & Rosanna Howard

New Business Forum
Administrative Lead: Deb Shaffer

Human Resources Manager Meeting
Administrative Lead: Colleen Bendl
New Additions

• Partner Groups
  • Permanent groups created to increase communication and better understand operations between academic and non-academic parts of campuses. Generally, partner groups are created around a service or university entity that academic partners use as a provider/vendor.
    • Partner groups are co-chaired by non-academic unit lead and an RC-S strategy member. RC-S co-chair is appointed by RC-S chairs.
    • Membership on partner groups is encouraged, but there are limited number of seats per committee. Not every academic unit is represented on every partner group, but academic units in general are represented on each group. Membership rotates. Requests for membership should go to Heather Krugman.
  • Partner Groups include: Compensation, Budget, Employee Services, Payroll, Facilities, Post Awards & Grants, Procure to Pay, Hospitality*, Accounts Receivable*

  * Denotes new or renewed partner groups
Partner groups and work groups

Pros

• More people involved
• More opportunity for staff development and also to affect change
• Better understanding of areas: fostering an environment for collaboration
• Action items in many groups getting acted on immediately
• Increased communication
• Better understanding of cause and effect

Cons

• Some groups may not yet be functioning at full capacity
• Time to sit on committees is always a challenge
• Does everyone feel included?
• Need better definition of deliverables and/or scope of work per group
New Additions Continued

• Work Groups
  • Work groups may come out of a need by partner groups, RC-Strategy, or other centralized working teams. Works groups are designed to work on finite projects with some expected end date (even if it’s a long work-period).
    • Work groups do not need to be co-chaired by academic personnel, but may, depending on the circumstance.
    • Existing work groups include: Performance Management, Budget Tools and Templates, P2P Business Processes, P2P Travel, P2P International, P2P Affordability and Efficiency, Chart of Accounts, Salary Crosswalk, Regression Analysis

• Advisory Groups
  • Generally, these groups are reserved for President or Provost Appointed groups
    • Examples include: Benefits Advisory, Budget Planning Council

• Business Forum Expanded
How it functionally works: an example

- RC-S
  - Compensation Partner Group
    - Performance management workgroup
      - Pilot Group
      - Subgroup
So what does that mean for us?

RC Strategy Group
Co-Chairs: Deb Shaffer & Heather Krugman

RC Administrative Technical Group
Co-Chairs: Julie Allison, Emily Chapman & Rosanna Howard

Partner Group

New Business Forum
Administrative Lead: Deb Shaffer

Human Resources Manager Meeting
Administrative Lead: Colleen Bendl
So what does that mean for us?

RC Strategy Group
Co-Chairs: Deb Shaffer & Heather Krugman

RC Administrative Technical Group
Co-Chairs: Julie Nelson, Emily Chapman & Rosanna Howard

Partner Group

New Business Forum
Administrative Lead: Deb Shaffer

Human Resources Manager Meeting
Administrative Lead: Colleen Bendl

IT’S A MESS!!
Business Forums will expand to every other month. Agendas will include budget and HR and other operational issues.
Affordability and Efficiency Work Group

• Ohio Task Force on Affordability and Efficiency requires compliance to maintain high quality education while decreasing institutional costs

• Timeline:
  • 0-3 months – office supplies, computer supplies, janitorial supplies and services
  • 6-12 months – travel, printing and copier supplies and services, web supplies and services, graphic design, and videography services
  • 12-18 months – specialized research supplies, facilities management, safety supplies, and international procurement

• An Affordability and Efficiency Work Group has been established to work through the initiatives in the mandate

• For more information, refer to the April 20 Compass Points article: Affordability and Efficiency Purchasing Work Group established
Partner Group
Compensation

Co-Chairs
Colleen Bendl: Chief Human Resources Officer
Heather Krugman: Deputy Director of Academic Budget Planning, Provost Office
Agenda

• FY18 Reappointment
• Early Retiree and Position Numbers
• Additional Compensation (Overload) Policy
Compensation Partner Group Update

Reappointment FY18

• EMS for Summer Contracts Only

• Spreadsheets will capture reappointment information, faculty promotion and tenure, HCOM faculty comp increases, additional elements. API (application program interface) will be used to make changes in Oracle.

• Costing Changes
  - Oracle Assignment Costing Module: Ability to make assignment costing changes at any time
Compensation Partner Group Update

Chart of Accounts Object Code Review

• Roll up configuration and element review
• Change requests sent to FSE team on April 25, 2017
Compensation Partner Group Update

Additional Compensation (Overload)

• Policy review and update
• Define elements and for what employee types
• Map out approval workflow
• Implementation of Individual Compensation Distribution (ICD)
Compensation Partner Group Update

Early Retiree and Position Numbers

• Position Numbers added to all ERs
• Ease of tracking and reporting
• Position Number format: PNERXXXX
Questions?

Contact:
Heather Krugman at krugman@ohio.edu
or
Colleen Bendl at bendl@ohio.edu
Payroll Partner Group

Co-Chairs:

**Tia Barrett:** Chief Financial and Administrative Office, College of Health Sciences and Professions

**Bridget Driggs:** Payroll Operations Manager, Human Resources
Agenda

• Manager Self Service Costing
• OGA Summer Pay Date Change
• Remaining FY17 Personal Days – Administrators and Classified Staff
• Personal Days for FY18
• Final FY17 Payroll Accounting Corrections
Manager Self Service Base Salary Assignment Costing
View employees you supervise, as well as any employees they may supervise

<table>
<thead>
<tr>
<th>Focus Name</th>
<th>Email</th>
<th>Assignment Number</th>
<th>Job</th>
<th>Department</th>
<th>Action</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diggins, Bridget</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bobcat, Rufus</td>
<td></td>
<td>186391</td>
<td>ADMIN[IC 4]FTNBUSDATAANLYS</td>
<td>20060 HUMAN RESOURCES</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Or search by name

<table>
<thead>
<tr>
<th>Focus Name</th>
<th>Email</th>
<th>Assignment Number</th>
<th>Job</th>
<th>Department</th>
<th>Action</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driggs, Bridget</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bobcat, Rufus</td>
<td></td>
<td>186391</td>
<td>ADMINIC 41 FINBUSDATAANLYS</td>
<td>20060 HUMAN RESOURCES</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Assignment Costing: People

**Select Person:** Bobcat

<table>
<thead>
<tr>
<th>Select</th>
<th>Name</th>
<th>Assignment Number</th>
<th>Job</th>
<th>Department</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bobcat, Rufus</td>
<td>186391</td>
<td>ADMIN</td>
<td>IC</td>
<td>FINBUSDATAANLYS</td>
</tr>
</tbody>
</table>

**Return to People in Hierarchy**
View employee details

<table>
<thead>
<tr>
<th>Name</th>
<th>Assignment Number</th>
<th>Job</th>
<th>Department</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bobcat, Rufus</td>
<td>186391</td>
<td>ADMIN</td>
<td>IC 4</td>
<td>FINBUSDATAANLYS</td>
</tr>
</tbody>
</table>

Return to People in Hierarchy
### Employment History

The following section displays the summary as of the effective date.

**Effective Date**: 28-Apr-2017

<table>
<thead>
<tr>
<th>Details</th>
<th>Assignment Number</th>
<th>Assignment Start Date</th>
<th>Assignment End Date</th>
<th>Primary Assignment</th>
<th>Job</th>
<th>Grade</th>
<th>Agreement Grade</th>
<th>Department</th>
<th>Location</th>
<th>Assignment Category</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self-Service</td>
<td>186391</td>
<td>01-Jan-2017</td>
<td></td>
<td>Yes</td>
<td>ADMIN</td>
<td>IC 4</td>
<td>FINBUSDATAANLYS</td>
<td>20060 HUMAN RESOURCES</td>
<td>HR OU ATHENS</td>
<td>Full Time Regular</td>
<td></td>
</tr>
</tbody>
</table>

**Performance Rating**: 0.32

**Total Training Days**: 0

**Salary**: 60000

**Department Manager**: Driggs, Bridget
Salary history

<table>
<thead>
<tr>
<th>Assignment Number</th>
<th>Change Date</th>
<th>Proposal Reason</th>
<th>Annualized Salary</th>
<th>Currency</th>
<th>Primary Assignment</th>
<th>Grade</th>
<th>Salary Rate</th>
<th>Salary Basis</th>
<th>Increase Amount</th>
<th>Next Review Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>186391</td>
<td>01-Jan-2017</td>
<td>New Hire</td>
<td>60,000.00</td>
<td>US Dollar</td>
<td>Yes</td>
<td></td>
<td>60,000.00</td>
<td>Salaried</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Choose “Action” arrow box to initiate costing change
Choose effective date of change. Please note that all costing changes will be effective the 1st or 16th of each month, dependent on the date you choose here.
Current costing will display and you can make changes. You can add a line for split costing, delete, or change percentages.
You can type, copy and paste, or use the search boxes to find costing strings.
In the below example, the costing is changing from 100% to 50/50. This is your chance to review before submitting.

**Assignment Costing**

Effective Date 01-May-2017

<table>
<thead>
<tr>
<th>Mode</th>
<th>Current Proportion (%)</th>
<th>Proposed Proportion (%)</th>
<th>Current Cost Codes</th>
<th>Proposed Cost Codes</th>
<th>Start Date</th>
<th>Current End Date</th>
<th>Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update</td>
<td>100</td>
<td>50</td>
<td>010-0000-20060-119000-UN2103664</td>
<td>010-0000-20060-119000-UN2103664</td>
<td>01-Jan-2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**New Cost Codes**

<table>
<thead>
<tr>
<th>Proportion (%)</th>
<th>Cost Codes</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 010-0000-20015-119000-0000000000</td>
<td>01-May-2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Confirmation that your changes were made.
The system will not let you make changes if payroll has already ran for that date. In the example below, payroll has already run for 4/16/17 - 4/30/17.

Effective Date 28-Apr-2017
Employee Name: Bobcat, Rufus
Organization Email Address: Driggs, Bridget

Effective date needs to be the first date of the pay period, please select the 1st or 15th of the month. Enter the date on which the changes should take effect, and press the Continue button.
Error message after attempting to change costing after payroll has already run
MSS Assignment Costing: Next Steps

• HR will be requesting a list of the individuals within your Planning Unit that will need to have access to change assignment costing within the new Oracle module: Assignment Costing.

• Individuals that you identify will have access to base salary/costing information across the University, and have the ability to change the costing information as needed.

• An email communication will go out soon.

• Go-live dates will be communicated soon.
Graduate Student Summer Pay Cycle Change

The Graduate Student pay schedule change will begin this month. This change will more closely align the graduate pay schedule with the academic calendar, and with when work is being performed. As a result of this change, Summer I pay dates will be paid in the appropriate fiscal year.

New Summer Graduate Pay Schedule

<table>
<thead>
<tr>
<th>Summer I</th>
<th>Summer II</th>
<th>Fall Semester</th>
<th>Spring Semester</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 31</td>
<td>July 15</td>
<td>September 15 &amp; 30</td>
<td>January 31</td>
</tr>
<tr>
<td>June 15</td>
<td>July 31</td>
<td>October 15 &amp; 31</td>
<td>February 15 &amp; 28 (29)</td>
</tr>
<tr>
<td>June 30</td>
<td>August 15</td>
<td>November 15 &amp; 30</td>
<td>March 15 &amp; 31</td>
</tr>
<tr>
<td></td>
<td></td>
<td>December 15 &amp; 31</td>
<td>April 15 &amp; 30</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>May 15</td>
</tr>
</tbody>
</table>
End of fiscal year reconciliation of leave usage

- As the end of FY17 approaches, faculty and staff are reminded to record all planned and/or confirmed absences through June 30 in the appropriate system to ensure that leave balances are appropriately reflected and carried over into FY18.

- Salaried Faculty & Administrators should refer to Absence Management in My Personal Information (MPI) to obtain current leave balances and should report all vacation and sick leave usage in Absence Management.

- Classified and administrative hourly staff using WorkForce time entry can view up-to-date usage and balance information through WorkForce as data is entered and submitted each pay period.

<table>
<thead>
<tr>
<th>Last day to use Personal Days for FY2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Classified Staff</td>
</tr>
<tr>
<td>Hourly Administrative Staff</td>
</tr>
<tr>
<td>Salaried Administrative Staff</td>
</tr>
</tbody>
</table>
Personal Days for FY18

• On July 1, personal days for FY18 will be established.

• For employees assigned eight-hour shifts with a sick leave balance of at least 120 hours (15 days), 24 hours of time will be converted.

• For classified employees assigned 10-hour shifts with a sick leave balance of at least 150 hours (15 days), 30 hours of time will be converted.

• All permanent and provisional full-time and part-time classified employees and administrators, who have a sick leave balance in excess of the amounts noted above as of the dates listed below, will have three days of sick leave time converted to personal leave for FY2018.
  • Classified and administrative hourly staff may use their newly accrued personal hours on or after July 1, 2017. Please note that accrual totals will not be visible in WorkForce until July 3.
  • Salaried administrative staff may use their newly accrued personal hours on or after the pay period beginning July 1, 2017
FINAL FY17 Payroll Accounting Corrections

• Final FY17 Payroll Expense Accounting Correction Forms are due no later than Friday, July 14.

• Any corrections received after this date may not be processed. Payroll only has until Thursday, July 20 to process them.
Questions?

Payroll Partner Group Co-chairs
Tia Barrett: barrettt@ohio.edu
Bridget Driggs: driggsb@ohio.edu

Group Members:
Eileen Theodore-Shusta
Carlotta Hensler
Janice Bailey-Magill
Lisa Poston
Teresa Hansbarger
Valerie Denney
Employee Service Center Partner Group

Co-Chairs:

Nick Wortman: Director of HR Services, Human Resources
Rosanna Howard: Director of Operations and Budget, Regional Campuses
Agenda

• Search Committee Training Offering
• Website Updates
• Update on RFP for Temporary Staffing Services
• Faculty Contract start dates AY17-18
Search Committee Training

• Partnership with the Office of Equity and Civil Rights Compliance and the Office of Diversity and Inclusion

• Informed by pilots in College of Arts and Sciences and Patton College of Education over the course of a year

• Two modules piloted last month. Pilot participants included faculty, administrative, and classified staff from a variety of departments.
Search Committee Training

• Overview of best practices in recruitment with a focus on inclusivity; identifying and combatting unconscious bias

• Module 1:
  • Geared towards search committee chairs and focused on establishing a search committee, writing inclusive job descriptions, and creating inclusive recruiting plans

• Module 2:
  • Geared towards search committee members (including chairs) and/or anyone involved in the search process and focused on inclusive candidate evaluation and selection practices
Search Committee Training

• Participants will receive:
  • Access to tools and resources
  • Monthly newsletter with more resources regarding “hot topics”
  • Invitations to monthly Lunch and Learns to further discussions, share success stories, and build better skills in recruitment
Search Committee Training

• Modules will be offered centrally at least once per month.

• Register at: https://calendar.ohio.edu
  • Keyword Search: Search Committee

• Spots Still Available for
  • Module 1: 5/9/17 8:30-10:30 HRTC 141
  • Module 2: 5/12/17 1:00-3:00 HRTC 141
  • Refer to the Calendar of University Events for a full listing of dates offered.

• Interested in scheduling sessions for your team or department? Contact your HR Liaisons.
Updates to HR Website
www.ohio.edu/hr

- Hiring Process Overview
- Requesting a Waiver of Posting
- Creating a Pool Posting
- Creating a Requisition
- Pre-Interview Process
- Extending an Offer of Employment
- Troubleshooting
Updates to HR Website

www.ohio.edu/hr

Guide to Terminations, Resignations, Retirements

• Mass termination scheduled and lookback periods for GIII, Students Employees, Program Employees, etc.

• Process for terminating TERM and TEMPORARY Employees

• Where to route Resignation and Retirement Notices

• What systems are “severed” when an employee is terminated from Oracle
Update on RFP for Staffing Services

• 18 firms submitted proposals
• Currently engaged in review/selection
• Anticipated campus rollout in July
Faculty Contract Start Dates

• Fall: August 16, 2017
• Spring: January 1, 2018
Questions, Suggestions?

• Rosanna Howard, Co-Chair stclairr@ohio.edu
• Nick Wortman, Co-Chair wortmann@ohio.edu
• Kim Hayden, hayden@ohio.edu
• Lisa Poston, postonl@ohio.edu
• Angela Spangler, spangle@ohio.edu
• Megan Vogel, vogelm@ohio.edu
Agenda

• Budget Partner Group Charge & Representation
• Areas of Focus
• Future Topics
Budget Partner Group Charge

• The Budget Partner Group is charged with developing solutions to improve the University budget process in conformance with the planning goals determined by University leadership. Areas of focus for improvement will include:
  • Communication
  • Budget and forecasting process
  • User needs and challenges
  • Professional development
  • Technology and tools
  • Change management
Representation

• The Budget Partner Group is co-chaired by the Director of Budget Planning & Analysis and a member of the RC Strategy Group, as selected by the RC Strategy Chair. The RC Strategy Group Co-chair will serve a two-year term.

• All campus Planning Units will have one member on the committee. Planning Units are defined below:

<table>
<thead>
<tr>
<th>Colleges</th>
<th>Academic Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Sciences</td>
<td>President’s Office</td>
</tr>
<tr>
<td>Business</td>
<td>Provost Office</td>
</tr>
<tr>
<td>Communication</td>
<td>Graduate College</td>
</tr>
<tr>
<td>Education</td>
<td>VP Research</td>
</tr>
<tr>
<td>Engineering</td>
<td>Library</td>
</tr>
<tr>
<td>Fine Arts</td>
<td>Student Affairs</td>
</tr>
<tr>
<td>Health Sciences &amp; Professions</td>
<td>Intercollegiate Athletics</td>
</tr>
<tr>
<td>Voinovich School</td>
<td>Finance &amp; Administration</td>
</tr>
<tr>
<td>Honors Tutorial</td>
<td>Advancement</td>
</tr>
<tr>
<td>International Studies</td>
<td></td>
</tr>
<tr>
<td>University College</td>
<td></td>
</tr>
<tr>
<td>College Of Medicine</td>
<td></td>
</tr>
<tr>
<td>Regional Campuses</td>
<td></td>
</tr>
</tbody>
</table>
Areas of Focus

• Communication
• Budget and forecasting process
• User needs and challenges
• Professional development
• Technology and tools
• Change management

• Assignment of New Budget
Contacts: Summer 2017
• Budget Process Timeline
• Overview of changing budget processes
• Facilitating Best Practices and FAQs
Areas of Focus

- Communication
- Budget and forecasting process
- User needs and challenges
- Professional development
- Technology and tools
- Change management
- Timing of Budget submissions, given dynamic planning assumptions
Areas of Focus

- Communication
- Budget and forecasting process
- User needs and challenges
- Professional development
- Technology and tools
- Change management

- Budget Packet Training – March training complete, new sessions planned in late May
Areas of Focus

• Communication
• Budget and forecasting process
• User needs and challenges
• Professional development
• **Technology and tools**
• Change management

  • Tools and Templates Workgroup
    • Budget Packet Redesign
    • Salary & Reconciliation Tools
  • User reporting needs
Areas of Focus

• Communication
• Budget and forecasting process
• User needs and challenges
• Professional development
• Technology and tools
• Change management

• Budget Packet Reconciliation Training
• Repair & Replacement Reserves
• Budgeting with the new Chart of Accounts
Questions?

April Ritchie - ritchiea@ohio.edu
Katie Hensel - hensel@ohio.edu
Benefits Update

1. Open Enrollment Closed Friday, May 5
   1. Benefit elections are effective July 1, 2017
   2. If you took no action, your current enrollment choices will remain in place excepting a flexible spending account

2. Express Scripts Advanced Utilization Management – First letters were mailed to impacted employee homes last week
   1. An additional mailing will be distributed in June
   2. Certain medications will require authorization/approval from Express Scripts in order to be covered
   3. Starts for prescriptions filled on or after July 1, 2017
   4. If you take no action regarding a letter received, your prescription will not be covered on or after July 1, 2017
   5. Detailed information is available on the HR/Benefits web site under the Prescription Drug Coverage page, including a list of medications impacted

3. Healthy Ohio participation reward is scheduled to be paid in the May 15 Semi-monthly and the May 24 bi-weekly pay
P2P Improvements Project

• Progress to Date:
  • New Non-PO payments process
    • Simplified entry of new suppliers and payments
  • Replace OHIO Sub-W9 with IRS Standard W9 form and New Supplier Information Form
  • Streamlined requisition workflow – elimination of many approval steps
  • Decisions on Signature Subdelegation related to COA rollout

• What we are working on:
  • COA remediation which will incorporate the signature subdelegation changes

• What we will be working on:
  • Help Desk restructuring and expansion
  • Continued process improvements for requisitions and payments
  • Supplier onboarding improvements
  • How To Guides and Job Aids
  • Template contracts
Financial System Enhancements

Julie Allison: Assistant Vice President, Finance
Leigh Casal: Change Management Associate, Finance & Administration
Agenda

• Updated COA materials
• Conversion Tools – COMING SOON!
• Viewing “draft” converted GL Data
• Grants Accounting Update
• Change Management Update
  • Human Resources Dashboard Release
  • Communication & Training Updates
• Questions
Updated Chart of Accounts (COA) Materials

• Updated materials posted to the COA website in Campus Involvement Section
  • COA Mapping Introduction Presentation
  • Quick Reference Guide – brief one page list of commonly used values for the segments of the GL COA
  • COA Master Segment Values List – detailed list of values for the GL segments (all but object codes)
  • Object Code List – various listings of proposed object codes
Conversion Tools

• OBI Dashboards are in development to assist in COA conversion
  • Conversion Crosswalk tool
    • Enter select segments in today’s chart...tool will return converted values that fit criteria
    • Can also work for natural accounts to object codes
  • Object Code lookup
    • Enter object code # or portion of description, will return all matching values along with any detailed descriptions
Viewing Converted GL Data

• Project team converts data approximately every 4-6 weeks
  • Data will be available for viewing through OBI dashboards
  • Team is currently developing dashboards to aid in viewing data

• Data will be available to Planning Unit mappers in June
  • After conversion has been reviewed/updated, subsequent data will be available to broader audience.
Viewing Converted GL Data (continued)

• Training sessions about viewing data will be scheduled in June and July
  • Week of June 5
  • Week of June 19
  • Week of July 4

• Sessions will focus on:
  • Refreshing mappers on mapping results, concepts
  • Instruction on using dashboards to view data and utilize parent hierarchy values.
Grants Accounting

• Sponsored projects
  • Have been mapped centrally and we are testing conversion programs

• Capital projects
  • currently testing setup process and assumptions
  • Working on mapping files and developing/testing conversion programs

• Internal Awards
  • Working with FSE Partner Group to review setup decisions and assumptions during May/June.
  • Will also work with group on mapping approach.
Change Management Agenda

• Training & Communication Updates
• Human Resources Dashboard Release
Training & Communication

• Budgeting for the new COA optional training in May
  • Budget Partner Group, RC Strategy & FSE Change Network

• Training Schedule
  • Round 2 of User Impact Analysis underway
  • Training Schedule to be published in June

• Monthly FSE feature highlight in Business Matters & Compass
  • Entity Segment: April
  • Source Segment: May
  • Org Segment: June
Human Resources Dashboard Release

• Dashboard will include:
  • Employee Look up
  • Absence Management
  • Appointment Information & Costing
  • Base Salary Listing

• Available to Planning Units in June
  • Access determined by CFAOs

• Training: Videos & Reference guide
Human Resources Dashboard Pilot

Pilot Group Participants:

• Janice Bailey-Magill - Engineering
• Sheila Shultz – President & Provost
• Diane Lucas & Carrie Horvath – Arts & Sciences
• Megan Vogel & April Crabtree – Student Affairs
• Kelly Coates - HCOM
• Kim Hayden – Regionals & University Outreach
• Rich Schmaltz – Human Resources
• Tia Barret - CHSP
COA Resources

COA Website:
https://www.ohio.edu/finance/coa/

All COA information posted on website
  • Utilize site to check on COA project news and updates.
  • FAQs
  • Change Network

Any questions?
  • Email COA@ohio.edu
Website Redesign Project
Finance/Finance and Administration

Leigh Casal: Change Management Associate, Finance & Administration
Finance Website Redesign

• Bursar website redesigned
  • Launched April 28
  • New URL: www.ohio.edu/bursar

• Finance Website
  • Go live in mid-late June
  • Improve *Business Matters* process
## Finance Website – Change Management

<table>
<thead>
<tr>
<th>Method</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Interviews</td>
<td>January</td>
</tr>
<tr>
<td>Current Usage Assessment</td>
<td>February</td>
</tr>
<tr>
<td>Focus Group – Card Sort</td>
<td>February &amp; March</td>
</tr>
<tr>
<td>One-on-one Interviews – Tree Sort</td>
<td>March</td>
</tr>
<tr>
<td>Timely Communication</td>
<td>Throughout Project</td>
</tr>
<tr>
<td>Training (for editors)</td>
<td>June</td>
</tr>
<tr>
<td>Follow up Survey</td>
<td>Fall 2017</td>
</tr>
</tbody>
</table>
Finance and Administration Website Redesign

• Go Live Date: May 12
  • New URL: www.ohio.edu/finance-administration
  • Redirect will be in place for 6 months

• Communication: Business Matters, Compass, Internal Finance and Admin Newsletter Direct Email

• Links to departments within Finance and Administration

• Information about offices within the Division
  • Business Service Center
  • Change Management and Communication
  • Office of the Vice President

• Resources for campus
  • Signature Authority document
  • Finance and Administration Project Portfolio
  • Business Forum
Questions

• Jennifer Cochran
  740-593-9643
  cochrarj1@ohio.edu
End of FY Purchasing @ Bobcat Depot
Kim McClain, Manager Bobcat Depot

• Orders need to be placed in time for the items(s) to be processed and received at the University prior to the end of the fiscal year
• Items not in stock (ex. custom orders, large quantities, etc.) will need to be ordered and received by June 30 to bill FY17
• June 9 will be last day for order processing for items that are not in stock
• If the item(s) needed are in stock at Bobcat Depot, we can charge through end of business day, Friday, June 30.
• Questions: bobcatdepot@ohio.edu
OHIO Ready Staff Pilot Program Update

Purpose/Mission

• Create a pool of employees who can fill short term accounting/office staffing needs
• Limit training expense and downtime for departments
• Cover internal leaves (medical, maternity, disciplinary) and departmental “busy seasons”
• Backfill vacancies temporarily during posting and recruiting
• Create a pipeline of trained and tested talent for the University
Pilot and Staffing Update

- In month seven of pilot program with great success
- Four full-time Accounting Support Associates
- Training began April 17, 2017 for second cohort
- Staff availability will be Mid-May 2017 for part-time and full-time assignments
- The Pilot Staffing Strategy goal was to have a broad representation of units. These units so far have included: HCOM, Catering, Real Estate, VP for Student Affairs, Culinary Procurement, Procurement and Contract Services, Architecture, Design and Construction, Parking and Transportation, School of Applied Health Sciences and Wellness
- Hourly billing rate: $27.00
  Manager and Trainer cost absorbed within Finance and Administration
Notes and Observations

- Higher than expected demand for part-time assignments
- Higher than expected demand for longer term assignments
- Unable to meet demand
- Very good feedback from units regarding the quality of work, the ease of transition and the knowledge base of employees when arriving on site for assignments
- Two original new hires have already moved on to promotional opportunities
The skills you need, the people you want trained, ready to work.
Employees are available for full and part-time assignments (depending on availability).

When to use OHIO Ready Staff?
When you need temporary accounting/office assistance due to: vacation, sick leave, maternity/paternity leave, peak work times or coverage during the hiring process, etc. All staff are trained OHIO employees.

Employees Trained on:
- Bobcat Buy
- Concur
- Microsoft Office
- FMS
- Oracle
- Cashnet
- OnBase
- PeopleSoft
- Sequoia
- And More!

Services Offered:
- Travel Itineraries
- Calendar Management
- Finance, Business and Accounting Support
- Customer Service
- Procurement
- Clerical Duties
- Journal Entries
- And More!

Contact Us:
Mindy Colburn
740.597.3269
colburnm@ohio.edu
April Butterworth
740.597.3120
butterwa@ohio.edu
Questions and Feedback

Getting the word out?

Other training topic ideas?

Questions and Inquires:
Mindy Colburn 740-597-3269 or colburnm@ohio.edu
PO Closures

• What Procurement Closes
  • Any general PO that is 60 days old or older, and has a difference between encumbered amount and billed amount of +/- $5
  • Any fully-satisfied direct payment that is 30 days or older

• FY17 Yearend Only
  • Leaving all blankets and service agreements open through November
  • May need to add funds to cover additional six months
  • Can request multiple changes on one change order request

• To request PO closure use PO close request in BobcatBUY
  • Can request multiple closures on one PO close request

• Chart of Accounts Cutover
  • Pre-entry for blankets/service agreements in new chart will be determined as project develops
Q&A

Next Business Forum
August 7, 2017
10:00 AM - 12:00 PM
Baker University Center 240