Business Forum

Tuesday, August 2, 2016
10:00 AM – 12:00 PM
Baker 240
Business Forum

- Sign-In sheet on back table
Business Forum Agenda

Business Forum Agenda: Julie Allison

Partner Groups
• Facilities: Steve Wood, Kelly Broughton & Luanne Bowman
• Procure to Pay: Diane Cahill & Laura Nowicki
• Post Awards and Grants: Michael Finney, Mo Valentine & Cindy Perry
• Chart of Accounts: Rosanna Howard & Julie Allison

Key Announcements
• Self Service Benefits Qualifying Life Events: Greg Fialko
• Training: Amanda Davis
Facilities Partner Group

Steve Wood, Executive Director
Facilities Management

Kelly Broughton, Assistant Dean for Research & Education Services
University Libraries

Luanne Bowman, Chief Financial & Administrative Office
Russ College of Engineering
Agenda

• Charge
• Representation
• Accomplishments
• Items in Progress
• Future Items
Charge

The Facilities Partner Group is charged with developing solutions to improve processes and communications between planning units and the University’s Facilities Management. The partner group will gather, review, and assist in the prioritization of issues related to custodial, grounds, and building maintenance and operations.
Representation

Steve Mack, Facilities Management
Jay North, Facilities Management
Dan Harper, College of Fine Arts
John Gilliom, College of Arts and Sciences
Dean Dupler, Heritage College of Osteopathic Medicine
Jason Farmer, Intercollegiate Athletic
Robin Krivesti, University Libraries

Mark Ferguson, Campus Recreation
Dustin Kilgour, Student Affairs
Kevin Witham, Admissions
Beth Lydic, Patton College of Education
Peter Trentacoste, Residential Housing
Tina Payne, Business Service Center
Marjorie Mora, Business Service Center
Accomplishments

The group started monthly meetings last November

- Budget Growth in FY16
- Implementation of new service model for Custodial services
- Work Order Prioritization (Internal)
- Implementation of Automated Customer Satisfaction Survey
- Initiative to improve communications through “Tech comments” on Work Orders
- Discussed interaction of partner group with Academic Support Improvement Committee (ASIC)

Key Discussion Point – how can Facilities better communicate with the campus community?
Items in Progress – Service Level Agreements

Group members identified desire to have service level agreement(s) to:

• Communication improvements – address failings in providing information to customer; resolution of issues
• Baseline vs. billable over multiple venues/locations
• Communication and responsibilities for shared or public-like spaces
• Foundation of accountability
• Clarification of some tensions (e.g. not a baseline service; can’t do it ourselves; can’t hire someone to do it)

Solicited service level agreements from other institutions
• Obtained Committee reviewed multiple Service Level Agreements (SLAs) from other institutions

• Developing SLA for application to all departments/Colleges
  • Appendices will be functional specific
# Service Level Agreement(S)

<table>
<thead>
<tr>
<th>TASK</th>
<th>ENTRANCES, LOBBIES, CORRIDORS</th>
<th>CLASSROOMS, SEMINAR ROOMS</th>
<th>RESEARCH LABS</th>
<th>OFFICES</th>
<th>CONFERENCE ROOMS, LOUNGES</th>
<th>RESTROOMS</th>
<th>STAIRWELLS</th>
<th>ELEVATORS</th>
<th>KITCHENETTES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRIORITY COLOR CODING</strong></td>
<td>#1 PRIORITY</td>
<td>#2 PRIORITY</td>
<td>#3 PRIORITY</td>
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<tr>
<td><strong>GENERAL CLEANING</strong></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Empty trash/replace liner</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>3x/work week</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
</tr>
<tr>
<td>Remove recycling</td>
<td>daily</td>
<td>daily</td>
<td>3x/work week</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>3x/work week</td>
<td>daily</td>
</tr>
<tr>
<td>Dust horizontal surfaces/vents</td>
<td>daily</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>daily</td>
<td>daily</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
</tr>
<tr>
<td>Clean chalk/white boards</td>
<td>daily</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean classroom desktops</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>daily</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
</tr>
<tr>
<td>Clean glass/partitions</td>
<td>1x/work week or as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>daily</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
<td>as needed</td>
</tr>
<tr>
<td>Clean drinking fountains</td>
<td>daily</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td></td>
</tr>
<tr>
<td>Clean/disinfect all fixtures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td></td>
</tr>
<tr>
<td>Check/replenish dispensers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td></td>
</tr>
<tr>
<td>Spot clean walls/doors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td></td>
</tr>
<tr>
<td><strong>FLOOR CARE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacuum/sweep pedestrian traffic areas</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
<td>1x/work week</td>
<td>daily</td>
<td>daily</td>
<td>daily</td>
</tr>
<tr>
<td>Vacuum/sweep complete room/corridor</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>daily</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
</tr>
<tr>
<td>Autoscrub/mop</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>daily</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
<td>1x/work week</td>
</tr>
<tr>
<td>Extract carpet/scrub &amp; recoat floor</td>
<td>annual</td>
<td>annual</td>
<td>annual</td>
<td>upon vacancy</td>
<td>annual</td>
<td>annual</td>
<td>annual</td>
<td>annual</td>
<td></td>
</tr>
</tbody>
</table>

The above services are provided during a Monday-Friday schedule in the frequencies indicated. Services will be performed only one-time per day on the scheduled days and frequencies indicated above unless otherwise noted. Additional service will be provided on a fee basis (all costs directly billed) and can be scheduled through the Facilities Management Work Center. Service delays may occur in cases of an emergency situation, such as a flood, as well as for snow removal.
Service Level Agreement(s)

• Efforts to date highlighted:
  • Balance between general and specific functions performed by Facilities Management
    • Heating, Ventilation, and Air Conditioning System versus Air Handling Unit
  • Gaps in funding and service level associated with transition to Responsibility Centered Management
    • Installed lab equipment
    • Users/Occupants should involve FM early in the design discussions, especially when planning any new or renovated facility that may include non-routine custodial or M/O obligations
      • Ascertain future Custodial, Grounds, Maintenance & Operations and budgetary implications of new work
Future Items

• Building Manager, or similar, program
• Mechanism for information sharing outside of direct customer
Questions?

Contact Steve Wood
Executive Director
Facilities Management
740-593-2726
Post Awards and Grants
Partner Group

Co-Chairs

Michael Finney: Chief Financial and Administrative Officer, Voinovich School
Cindy Perry: Director, Grants Accounting
Mo Valentine: Assistant Vice President for Research, Research and Sponsored Programs
Agenda

• Equipment Inventory – Cindy Perry
• Sponsor Equipment – Cindy Perry
• Fixed Asset Dashboard – Mike Finney
• Procurement – Micro-purchases – Mike Finney
• Sub-recipient Review Process – Mo Valentine
• Office of Research and Sponsored Programs Reorganization – Mo Valentine
Equipment Inventory

- Equipment is moveable and not permanently fixed.
- Cost $5,000 or greater (includes gifts appraised value).
- Useful life of one year or more.

<table>
<thead>
<tr>
<th>University owns equipment (green tag on equipment)</th>
<th>Sponsor owns but University is in possession of equipment (red tag on equipment)</th>
<th>Sponsor owns and in possession of equipment or building a piece of equipment (see note below)</th>
</tr>
</thead>
<tbody>
<tr>
<td>941000</td>
<td>948000</td>
<td>965000</td>
</tr>
<tr>
<td>942000</td>
<td>950000</td>
<td></td>
</tr>
<tr>
<td>943000</td>
<td>951000</td>
<td></td>
</tr>
<tr>
<td>944000</td>
<td>952000</td>
<td></td>
</tr>
<tr>
<td>945000</td>
<td>961000</td>
<td>960000</td>
</tr>
<tr>
<td>946000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Equipment being built from items less than $5,000 and once built will be $5,000 or greater must be tagged if the University is in possession of the equipment. Contact finance.equipmentinventory@ohio.edu once the item is built so it may be tagged.
Sponsor Equipment

• Ohio University’s Oracle Business Intelligence (OBI) system for the Finance Fixed Assets Dashboard now provides Sponsor Equipment (red tag).

• The Fixed Assets Dashboard provides the ability to display asset(s) by Contractor or Government Acquired, Asset Name, Date in Service, Cost, Department, Building, Room, Tag Number, Part Number, Grant/Contract Number, Employee and Sponsor.

• Contractor Acquired – purchased on grant using natural account 965000. Ohio University is using the equipment that is vested with sponsor.

• Government Acquired – sponsor provided equipment to Ohio University that is vested with sponsor.
Fixed Assets Dashboard

• Log in to OBI using: https://obiprd.oit.ohio.edu/ with OHIO ID and password

• Click Dashboards and navigate to Finance and Administration Dashboards and click on Finance and Administration.
Procurement – Micro-purchases

• Uniform Guidance Procurement standards 2 CFR 200.320(a), *Procurement by micro-purchases* was extended to July 1, 2017 by Office of Management and Budget (OMB) and requires three quotes for purchasing items $3,500 or more.

• Council on Governmental Relations (COGR) has advocated to OMB an increase in the micro-purchase threshold from $3,500 to $10,000 and extend the implementation of this standard to July 1, 2018.

• COGR has also requested that State institutions have the opportunity to request an exemption in accordance with 2 CFR Part 200.317-326 as afforded to States.

• Federal Register expected in September/October 2016 timeline.
Sub-recipient Review Process

• Uniform Guide requirements (2 CFR 200.330-332)
  • Sub-recipient and contractor determinations
  • Requirements for pass-through entities
    • Risk Assessment
    • FFATA Reporting
    • Monitoring Activities
  • Fixed amount Sub-awards
    • Allowed under certain circumstances (§200.201)
ORSP Reorganization

• Cradle to Grave Service

• New Service Center
  • orsp@ohio.edu or 740-597-ORSP (6777)

• Core Competency Training Program

• Announcement of Manager Assignments Planned for August 1

• Open House Planned for September
Questions?

Cindy Perry (perryc@ohio.edu)
Michael Finney (finney@ohio.edu)
Mo Valentine (valentip@ohio.edu)
Partner Group
Chart of Accounts

Co-Chairs

Rosanna Howard: Director of Operations & Budget, Regional Campus

Julie Allison: Assistant Vice President, Finance
Agenda

• Financial System Enhancements
• Chart of Accounts (COA) & Grants Accounting
  Project Updates
• Change Management Activities
  • Change Network
  • Awareness Sessions
  • Training Approach
  • User Impact Analysis
  • Communication Strategy
Financial System Enhancements (FSE)

• What are “Financial System Enhancements”?

• Leveraging change management to support strategic projects
Financial System Enhancements

to empower you

**Increased Consistency**
Robust accounting structure that gives you the flexibility to use consistently defined segments for improved data integrity while supporting user-defined needs

**Enhanced Reporting**
Reporting that allows you to sort, drill down and roll up accounting data at various levels through hierarchies and relationships

**Informed Decision-Making**
System capabilities that allow you to aggregate data to view historic trends, analyze current state and forecast for optimal financial efficiency across the University

OHIO UNIVERSITY

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Project Update
Chart of Accounts
Grants Accounting
Mapping Update

• Mapping activities have been occurring since June with Planning Unit representatives

• Focus is on General Ledger Account Strings and Identification of Project-Task-Award Combinations that Units would like to use in Grants

• Every existing combination (account string) has to be mapped to a new account string.
  
  A. Existing Fund Type-Fund-Org-Project will map to:
  • GL: Entity.Source.Org.Activity.Function or
  • Grants: Project-Task-Award

  B. Existing Natural Accounts will map to:
  • GL: Object Code or
  • Grants: Expenditure Type

• Mapping is iterative as we add new values in existing chart
Mapping Timelines for Grants

<table>
<thead>
<tr>
<th>Mapping</th>
<th>Mapping Period</th>
<th>Updates</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Projects</td>
<td>Fall 2016</td>
<td>Refresh through go live</td>
<td>Grants team</td>
</tr>
<tr>
<td>Capital Projects</td>
<td>Fall 2016</td>
<td>Refresh through go live</td>
<td>Capital Projects team</td>
</tr>
<tr>
<td>GL combos to map to Grants</td>
<td>Winter 2016</td>
<td></td>
<td>PU/Internal Award team</td>
</tr>
</tbody>
</table>
Segment Values Update

• Object Codes
  • 1st First Draft Object Codes – August
  • COA Partner Group Review
  • Distribution to Campus for Review

• Functions
  • Published – August
  • COA Partner Group Review
  • Distribution to Campus
COA Project Update

• General Ledger (GL) Prototype
  • Phase I – July
  • Phase II – August

• GL Conversion – based on mapping results – August
Grants Project Update

- Identifying processes and values
  - Sponsored
  - Capital
  - Internal Awards

- Conference Room Pilots (CRP) – August
  - Proof of Concept
  - Assessment of Options

- Grants Demo Sessions
  - RC Strategy, RC Technical, Post Award Partner Group
Reporting Strategy

• OBI Dashboards are central to our reporting strategy
• Each Dashboard can have multiple tabs for various inquiries and reports
• Dashboards will go live with new COA and Grants Accounting Module
• Campus Partner Groups – Developing and Reviewing Proposed Dashboards
Change Network
To assist you in this process we have created a Change Network

Each member can assist you by:

1. Pointing you to resources on COA Website.
2. Supporting you in one on one training.
3. Cascading important communications.
4. Informing you about important changes and upcoming events.
5. Represent your feedback/interests to the Core Project Team
# Change Network Members

<table>
<thead>
<tr>
<th>Planning Unit</th>
<th>Representative(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement</td>
<td>Mark Willis</td>
</tr>
<tr>
<td>Arts &amp; Sciences</td>
<td>April Ritchie Diane Lucas</td>
</tr>
<tr>
<td>Athletics</td>
<td>Tim Knavel</td>
</tr>
<tr>
<td>College of Business</td>
<td>Evelyn Blake Jill Nice Phillip Taylor</td>
</tr>
<tr>
<td>College of Communication</td>
<td>Emily Chapman Sue Cyran</td>
</tr>
<tr>
<td>College of Education</td>
<td>Beth Lydic</td>
</tr>
<tr>
<td>College of Fine Arts</td>
<td>Elizabeth Braun</td>
</tr>
<tr>
<td>College of Engineering</td>
<td>Becky Maccombs</td>
</tr>
<tr>
<td>Research &amp; Graduate College</td>
<td>Keith Leffler</td>
</tr>
<tr>
<td>College of Medicine (HCOM)</td>
<td>Kelly Coates Kelly Gorscak</td>
</tr>
<tr>
<td>Health Sciences &amp; Professions</td>
<td>Beth Tragert Erin Fraunfelter</td>
</tr>
<tr>
<td>Honors Tutorial</td>
<td>Kathy White</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning Unit</th>
<th>Representative(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructional Innovation</td>
<td>Sheila Schultz</td>
</tr>
<tr>
<td>Global Affairs &amp; International Studies</td>
<td>Kell Morton</td>
</tr>
<tr>
<td>President and Provost Office</td>
<td>Claire Carson Sheila Schultz</td>
</tr>
<tr>
<td>Regional Campuses</td>
<td>Rosanna Howard</td>
</tr>
<tr>
<td>Student Affairs</td>
<td>April Crabtree</td>
</tr>
<tr>
<td>University College</td>
<td>Wendy Merb-Brown</td>
</tr>
<tr>
<td>University Libraries</td>
<td>Deborah Daniels</td>
</tr>
<tr>
<td>Voinovich School</td>
<td>Gina Johntony Mike Finney</td>
</tr>
<tr>
<td>VPFA: Custodial, Design &amp; Construction, Facilities, Grounds, Maintenance, Risk Management, Real Estate</td>
<td>Marjorie Mora</td>
</tr>
<tr>
<td>VPFA: Airport, Culinary, Logistics, Printing, Regional Retail, &amp; OUPD</td>
<td>Mindy Colburn</td>
</tr>
<tr>
<td>VPFA: Parking &amp; Transportation, Human Resources, &amp; OIT</td>
<td>Moriah Hudspeth</td>
</tr>
<tr>
<td>VPFA Non-Finance</td>
<td>Tina Payne</td>
</tr>
<tr>
<td>VPFA: Budget, Bursar, Capital Projects, Controller, FAST, Foundation, Grants, Internal Audit, Payroll, P2P, Tax, Treasury</td>
<td>Leigh Casal</td>
</tr>
</tbody>
</table>

This is available on the Campus Involvement page of the COA website. [www.ohio.edu/finance/coa](http://www.ohio.edu/finance/coa)
Regional Change Network Members

<table>
<thead>
<tr>
<th>Planning Unit</th>
<th>Representative(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central – RHE Executive Dean’s Office</td>
<td>Rosanna Howard, Kim Hayden</td>
</tr>
<tr>
<td>Eastern, Zanesville &amp; Cambridge</td>
<td>Angela Richcreek</td>
</tr>
<tr>
<td>Lancaster</td>
<td>Gwen Whitehead, Janet Becker</td>
</tr>
<tr>
<td>Southern</td>
<td>Kim Addis</td>
</tr>
<tr>
<td>Chillicothe</td>
<td>Jonna Depugh</td>
</tr>
</tbody>
</table>

This is available on the Campus Involvement page of the COA website. www.ohio.edu/finance/coa
Awareness Sessions

• August 1 – August 18: 20 sessions
  • 2 via OULN for Regionals, 3 streamed via AdobeConnect for satellite campuses

• Compass, Business Matters, Direct Email

• Agenda
  • Financial System Enhancements
  • Chart of Accounts Structure
  • Grants Accounting Module
  • System Impacts
  • Training Overview
  • Communication Strategy
  • Intro of Change Network
  • Project Timeline
Training Approach

• Awareness: August
• Central Finance Readiness: September & December
• Leader Readiness: September
• User Readiness: October/November

• High Level Training Plan: January - March
  • Fundamentals
    • Excel, COA, Report, OBI, Grants Accounting
  • Series of Advanced Reporting Courses
• Grants Accounting Advanced
• Financial Approvers
User Impact Analysis

• Will begin in August with all Planning Units CFAO & Change Network Member

• End Result: Map users to training courses & identify training gaps
Communication strategy

Change Management

- User Impact Analysis
- Change Network
- Awareness & Readiness Sessions
- Pulse Surveys

Communication

- Business Forum, RC Strategy, Partner Groups, Awareness & Readiness
- Direct Email to Impacted Users
- Monthly articles in Compass Points & Business Matters
- COA Website (ohio.edu/finance/coa) Financial Systems Website (upcoming)
- Alternative Communication Vehicles
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

Any questions?
  • Email COA@ohio.edu
Procure to Pay Partner Group

Co-Chairs: Laura Nowicki, Director, Procurement Services and Diane Cahill, Director of Operations, Office of Global Affairs and International Studies

Presenting: Diana McGrew, Assistant Director, Procurement Services
Agenda

- Policy Updates
- P2P Business Manual
- Proposed New Direct Payment List
- P2P Paper Forms review
Policy Updates

• Procurement Policy
  • Complete
  • In final review with Legal, Internal Audit, and final reviewers
  • Impact: No major impact. Process removed and tied to regulatory requirements.

• PCard Policy
  • Complete
  • In final review with Legal, Internal Audit, and final reviewers

• Next Steps
  • Final review/approval by ESPC
  • Release to campus for comment and final approval
Policy Updates

• Travel Policy
  • Subcommittee to convene in September
  • Begin work based on new Procurement and PCard policies
P2P Business Manual

• Reflects process removed from policy
• Additions include all aspects of P2P operations
  • Accounts Payable
  • Contract Services
  • Finance Customer Care (PCard, supplier entry, etc.)
  • Procurement
  • Travel
• Updated Purchasing Grid
Direct Payment Policy

• Direct Payment Policy
  • Folded in with other policies into the updated Procurement Policy.

• The Need
  • Move away from after the fact payments in areas that are not regulated or benefit from Terms and Conditions, insurance, etc. that must be in place prior to the order and/or service.
# Direct Payment Modifications

## New Direct Payment List - Proposed

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Airport charges - Payments to airports for landing, parking, and refueling of University-owned aircraft</td>
</tr>
<tr>
<td>2</td>
<td>Awards and Prizes to non-university employees</td>
</tr>
<tr>
<td>3</td>
<td>Certification - Required certification, inspection, and/or licensing fees*</td>
</tr>
<tr>
<td>4</td>
<td>Exhibit-fees without a contract</td>
</tr>
<tr>
<td>5</td>
<td>Government - All payments to county, state and federal government agencies without a contract</td>
</tr>
<tr>
<td>6</td>
<td>INS Fees/Visas</td>
</tr>
<tr>
<td>7</td>
<td>License and Inspection Fees (non-software) that do not include a contract</td>
</tr>
<tr>
<td>8</td>
<td>Legal settlements and associated costs (authorized for the Office of Legal Affairs, Legal Counsel, Special Legal Items, and VP for Finance area only)</td>
</tr>
<tr>
<td>9</td>
<td>Lists, including mailing lists/labels and Graduate Student Locator Service List</td>
</tr>
<tr>
<td>10</td>
<td>Memberships. (No personal memberships or donations)</td>
</tr>
<tr>
<td>11</td>
<td>Notary Public fees that do not include a contract</td>
</tr>
<tr>
<td>12</td>
<td>Postage - Payments made to the Postmaster for postage, stamps, metered mail, box rental, or stamped envelopes</td>
</tr>
<tr>
<td>13</td>
<td>Publication submission fees</td>
</tr>
<tr>
<td>14</td>
<td>Published materials - Books, texts, publications, periodicals, directories, and interlibrary loan fees</td>
</tr>
<tr>
<td>15</td>
<td>Refunds of monies previously paid to the University (including monies paid to grantors)</td>
</tr>
<tr>
<td>16</td>
<td>Research subjects and simulated patients unless recurring payments exist.</td>
</tr>
<tr>
<td>17</td>
<td>Stipends</td>
</tr>
<tr>
<td>18</td>
<td>For Reimbursement for non-OU employees only (examples: guest lecturer, job applicant): All travel, entertainment, and related expenses, including per diem</td>
</tr>
<tr>
<td>29</td>
<td>Gifts per approved polices (May be taxable under some circumstances and unallowable on certain funding sources)</td>
</tr>
<tr>
<td>30</td>
<td>Gasoline (OU vehicles)</td>
</tr>
</tbody>
</table>
P2P Paper Forms review

• Reviewing Opportunities to:
  
  • Review current paper forms for standardization
  • Review current paper forms and processes for technology enhancements
  • Streamline forms and processes
  • Remove unnecessary information fields
Questions?

• Please contact Finance Customer Care at:

  • financecustomercare@ohio.edu

  • 740-597-OHIO (6446)
BENEFITS – OAB2

Greg Fialko, Director – HR Benefits
Self-Service Benefits Project

• Convert from paper enrollment forms to using Oracle Self-Service Benefits for new hire and existing employee qualifying event benefit enrollments

• Goal: September 2016 implementation

• Self-Service Benefits is the system used for Open Enrollment

• Further information will be provided closer to implementation date
Questions?

University Human Resources
740-593-1636
Benefits@ohio.edu
Training

Amanda Davis, Director of Strategic Change Integration
Training Advisory Council

• **Co-Chairs:** Amanda Davis (VPFA Communication & Training) *and* Lewis Mangen (HR Organizational Development & Talent Development)

• Kick-off this fall

• Equal representation from Administrative Senate, Classified Senate, and RC Strategy

• Collaborative effort to identify and fulfill staff training needs

• Questions? Email Amanda Davis: [davisa6@ohio.edu](mailto:davisa6@ohio.edu)
Customer service training

Customer service was identified as one of the top campus training needs through various Training Needs Assessments conducted by UHR Organizational Development and VPFA Communication & Training departments.

• Creating a Customer Culture training will cover customer service basics and best practices at Ohio University

• Training consists of two two-hour sessions

• Training scheduled September 12-30

• Registration information will be available in the August Business Matters and Compass Points

• Questions? Email Jewell Barlow: barlowj1@ohio.edu
Microsoft Excel training

Based on an extensive research and vetting process, the following training plan addresses 90% of OHIO Employees’ Excel training needs.

Excel Training Topics:
- Basic Formulas
- Advanced Formulas
- General Formatting
- Conditional Formatting
- Pivot Tables
- Visual Presentation Skills
Microsoft Excel training cont.

• Each session lasts two hours and combined instructor-led training and open lab to allow real-time learning within the context of specific tasks

• Two training series were offered this year at Alden Library

• Both series ran at full capacity

• One final series will follow this fall and registration information will be available in Business Matters and Compass Points

• Questions? Email Adam Lewis: lewisa2@ohio.edu
Next Business Forum

Tuesday, November 8, 2016
2:00 pm - 4:00 pm
Baker University Center 240