

# Business Forum

February 9, 2017

10 AM -12 PM

HRTC 141-145



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# Benefits Advisory Council Update

- Guiding Principles
  - Eliminate structural deficits
  - Avoid Affordable Care Act Cadillac Plan Tax (required by state law)
  - Establish a maximum university contribution to the annual inflationary cost of benefits (no more than 5%)
- Previous recommendations include (but not limited to):
  - Three year (FY16, FY17, FY18) plan to mitigate costs (5% goal) and avoid Cadillac plan tax
  - Increase the percent of premiums paid by employees
  - Changing benefits eligibility or staff to positions with an FTE of 0.75 or greater and appointment length of 4 months or longer (included grandfathering)
  - Offer new vision and short term disability plans
  - Ensure benefit plans provide coverage for transgender health care needs
  - Funding for HealthyOhio, specifically the VirginPulse wellness program web site



# Budget Projections and Cost Savings Needed to Maintain 5% Goal

|   | FY17 (Update)              | FY18                       | FY19                       | FY20                       |
|---|----------------------------|----------------------------|----------------------------|----------------------------|
| <b>Medical Claims</b>                   | 43,557,000                 | 45,711,000                 | 48,402,000                 | 51,185,000                 |
| <b>Rx Claims</b>                        | 11,986,000                 | 13,264,000                 | 14,789,000                 | 16,490,000                 |
| <b>Dental Claims</b>                    | 2,190,000                  | 2,277,000                  | 2,369,000                  | 2,464,000                  |
| <b>Fees/Other Ins</b>                   | 7,043,525                  | 6,691,525                  | 6,990,525                  | 7,336,525                  |
| <b>Total</b>                            | <b>64,776,525</b>          | <b>68,003,525</b>          | <b>72,550,525</b>          | <b>77,475,525</b>          |
| <b>Premiums</b>                         | <b><u>(12,503,000)</u></b> | <b><u>(12,928,000)</u></b> | <b><u>(13,594,540)</u></b> | <b><u>(14,307,738)</u></b> |
| <b>Claims + Fees Net Premiums</b>       | <b>52,273,525</b>          | <b>55,075,525</b>          | <b>58,955,985</b>          | <b>63,167,787</b>          |
| <b>Percent Increase</b>                 |                            | 5.3%                       | 7%                         | 7%                         |
| <b>Savings needed to reach 5% goal</b>  |                            | 188,324                    | 1,126,684                  | 1,264,003                  |
| <b>Three year cost containment need</b> |                            |                            |                            | 2,579,0101                 |



# Benefits Advisory Council Recommendations

- Deductible and co-insurance changes from original 3 year plan (see chart)
- Employee premium percent increase from original 3 year plan (see chart)
  - the premium changes raise employee costs between 3%-9% depending on family size (single/family) or between \$2-\$4 (single) and \$20-\$40 (family) per month depending on salary level.
- Implement advanced utilization management programs to control/reduce prescription drug costs:
  - Step therapy
  - Prior authorization
  - Drug quantity management
- Conduct a dependent eligibility audit
- Cease offering Eastern Campus HMO plan
- Increase long term disability monthly benefit maximum from \$6,000 per month to \$20,000 per month



# Original 3 Year Plan FY16 – FY17- FY18

Deductibles, Coinsurance Maximum, and Premiums will be adjusted as previously announced.

| Options              | FY15            | FY16 (July 2015) | Current<br>FY17 (July 2016) | FY18 (July 2017) |
|----------------------|-----------------|------------------|-----------------------------|------------------|
|                      |                 | Plan Change      | Plan Change                 | Plan Change      |
| Deductible           | \$200/\$400     | \$400/\$800      | \$450/\$900                 | \$500/\$1000     |
| Co-Insurance Maximum | \$1000/\$2000   | \$1500/\$3000    | \$1750/\$3500               | \$2000/\$4000    |
| Co-Insurance %       | 90%             | 85%              | 80%                         | No change        |
| Office Visit Copays  | \$20            | \$25             | No change                   | No change        |
| Rx Retail Copays     | \$10/\$20/\$30  | \$20/\$30/\$40   | No change                   | No change        |
| Rx Mail Copays       | \$15/\$30/\$45  | \$25/\$35/\$55   | No change                   | No change        |
| Premium              | 15% - 15% - 15% | 15%-16%-17%      | 15% - 17% - 19%             | 15%-17.5%-20%    |



# Prescription Plan Changes

- Express Scripts Advanced Utilization Management
  - Drug Quantity Management\*: aligns the dispensed quantity of a prescription medication with the FSA-approved dosage guidelines.
    - Example: For migraine therapy, most individuals normally do not require daily medication so DQM may set a normalized quantity for a 30 day period.
    - Example: Proton pump inhibitors to treat peptic ulcer disease. Most ulcers are healed within an eight week duration of therapy. Certain conditions such as erosive esophagitis may require continued therapy.
  - Step Therapy\*: Promotes the use of clinically effective, therapeutically equivalent, and less costly alternatives where clinically available and appropriate.
    - Example: Non-steroid anti-inflammatory drugs (NSAIDs) for treatment of inflammation and arthritis pain. Traditional NSAIDs are available in generic form but can sometimes result in side effects such as stomach irritation. A newer NSAID may be appropriate for patients who have experienced side effects or already have a gastrointestinal condition.



# Prescription Plan Changes

- Prior Authorization\*: Requires pre-approval from Express Scripts in order for a medication to qualify for coverage under the plan.
- Prior Authorization parameters are developed by Express Scripts' pharmacists and medical experts, and take into consideration the desired outcome for the patient, manufacturers prescribing guidelines, instances where compelling evidence in medical compendia indicate the drug works for a particular condition, and the value to the university benefit plan.
- Approximately 900 university employees and/or family members current receive a prescription impacted by prior authorization.
- Beginning 45-60 days ahead of July 1, 2017 go-live date, Express Scripts will distribute letters to impacted individuals detailing the program and need for their physician to contact Express Scripts.
- If a prescription does not meet the prior authorization guidelines, the plan will not cover the prescription. The employee can continue the prescription by paying the full cost, or work with the physician to find an alternative therapy/drug.
- Express Scripts has indicated they expect more than 50% of current prescriptions to pass the prior authorization request.
- Prior Authorization is already in place at other Express Scripts clients such as OPERS, STRS, and Ohio State.

\* Source: Some material from AMCP – Concepts in Managed Care Pharmacy, April 2012



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Further details regarding all changes, including prescription plan changes will be made available in the coming weeks.





# Healthy Ohio

1. Currently Under Way on Athens Campus  
Regional Campus screenings scheduled in March
2. Benefits Eligible Staff and spouses can participate
3. Two Step Process
  - Step 1: Receive a free health screening with results review
  - Step 2: Activate Virgin Pulse account and complete the health assessment
4. \$120 Participation Reward  
Will be changing to a one-time payment and not a per-pay reward
5. Virgin Pulse Web Site
  1. Wellworks and HR are partnering with Virgin Pulse to provide an easy to use online portal and/or mobile app for faculty and staff to track wellness and participate in wellness activities
6. Visit <https://www.ohio.edu/wellworks/events/healthy-ohio.cfm> for more details.



# Facilities Partner Group

Steve Wood, Associate Vice President  
Facilities Management & Safety

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

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



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# Agenda

- Charge
- Representation
- Service Level Agreements
- APPA FPI
- 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 & Safety

Jay North, Facilities Management  
& Safety

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



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# Items in Progress – Service Level Agreements

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

- 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**



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# Service Level Agreement(S)

| Ohio University<br>Facilities Management - University Custodial Services<br>Cleaning Service Levels  |                                     |                                 |                              |              |                                 |           |              |              |              |
|--|-------------------------------------|---------------------------------|------------------------------|--------------|---------------------------------|-----------|--------------|--------------|--------------|
| TASK   | ENTRANCES,<br>LOBBIES,<br>CORRIDORS | CLASSROOMS,<br>SEMINAR<br>ROOMS | RESEARCH<br>LABS             | OFFICES      | CONFERENCE<br>ROOMS,<br>LOUNGES | RESTROOMS | STAIRWELLS   | ELEVATORS    | KITCHENETTES |
| PRIORITIZATION COLOR CODING  | #1 PRIORITY                         |                                 |                              | #2 PRIORITY  |                                 |           | #3 PRIORITY  |              |              |
| GENERAL CLEANING   |                                     |                                 |                              |              |                                 |           |              |              |              |
| Empty trash/replace liner  | daily                               | daily                           | daily                        | 3x/work week | daily                           | daily     |              |              | daily        |
| Remove recycling   | daily                               | daily                           | 3x/work week                 | 3x/work week | daily                           |           |              |              | 3x/work week |
| Dust horizontal surfaces/vents   | daily                               | 1x/work week                    | 1x/work week<br>or as needed | 1x/work week | 1x/work week                    | daily     | 1x/work week | 1x/work week | 1x/work week |
| Clean chalk/white boards   |                                     | daily                           |                              |              | as needed                       |           |              |              |              |
| Clean classroom desktops   | as needed                           | as needed                       | as needed                    | as needed    | as needed                       |           |              |              |              |
| Clean glass/partitions   | 1x/work week<br>or as needed        | as needed                       | as needed                    | as needed    | as needed                       | daily     | as needed    |              | as needed    |
| Clean drinking fountains   | daily                               |                                 |                              |              | daily                           |           |              |              | daily        |
| Clean/disinfect all fixtures   |                                     |                                 |                              |              |                                 | daily     |              |              |              |
| Check/replenish dispensers   |                                     |                                 |                              |              |                                 | daily     |              |              |              |
| Spot clean walls/doors   |                                     |                                 |                              |              |                                 | daily     |              |              |              |
| FLOOR CARE   |                                     |                                 |                              |              |                                 |           |              |              |              |
| Vacuum/sweep pedestrian traffic areas  | daily                               | daily                           | daily                        | daily        | daily                           |           | 1x/work week | daily        | daily        |
| Vacuum/sweep complete room/corridor  | 1x/work week                        | 1x/work week                    | 1x/work week                 | 1x/work week | 1x/work week                    | daily     | 1x/work week | 1x/work week | 1x/work week |
| Autoscrub/mop  | 1x/work week                        | 1x/work week                    | 1x/work week                 | 1x/work week | 1x/work week                    | daily     | 1x/work week | 1x/work week | 1x/work week |
| Extract carpet/scrub & recoat floor  | annual                              | annual                          | annual                       | upon vacancy | annual                          |           |              | annual       | annual       |
| 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. |                                     |                                 |                              |              |                                 |           |              |              |              |



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**Grounds Maintenance to be addressed after  
Maintenance & Operations and Custodial Services**

# 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
- Moving forward with capturing customer specific requirements
  - Custodial and Event Services met and identified specific requirements.
    - Custodial will work with Campus Recreation next
  - Maintenance to work with Alden Library staff on customer specific requirements
  - Grounds Maintenance Draft SLA to be reviewed at next partner meeting





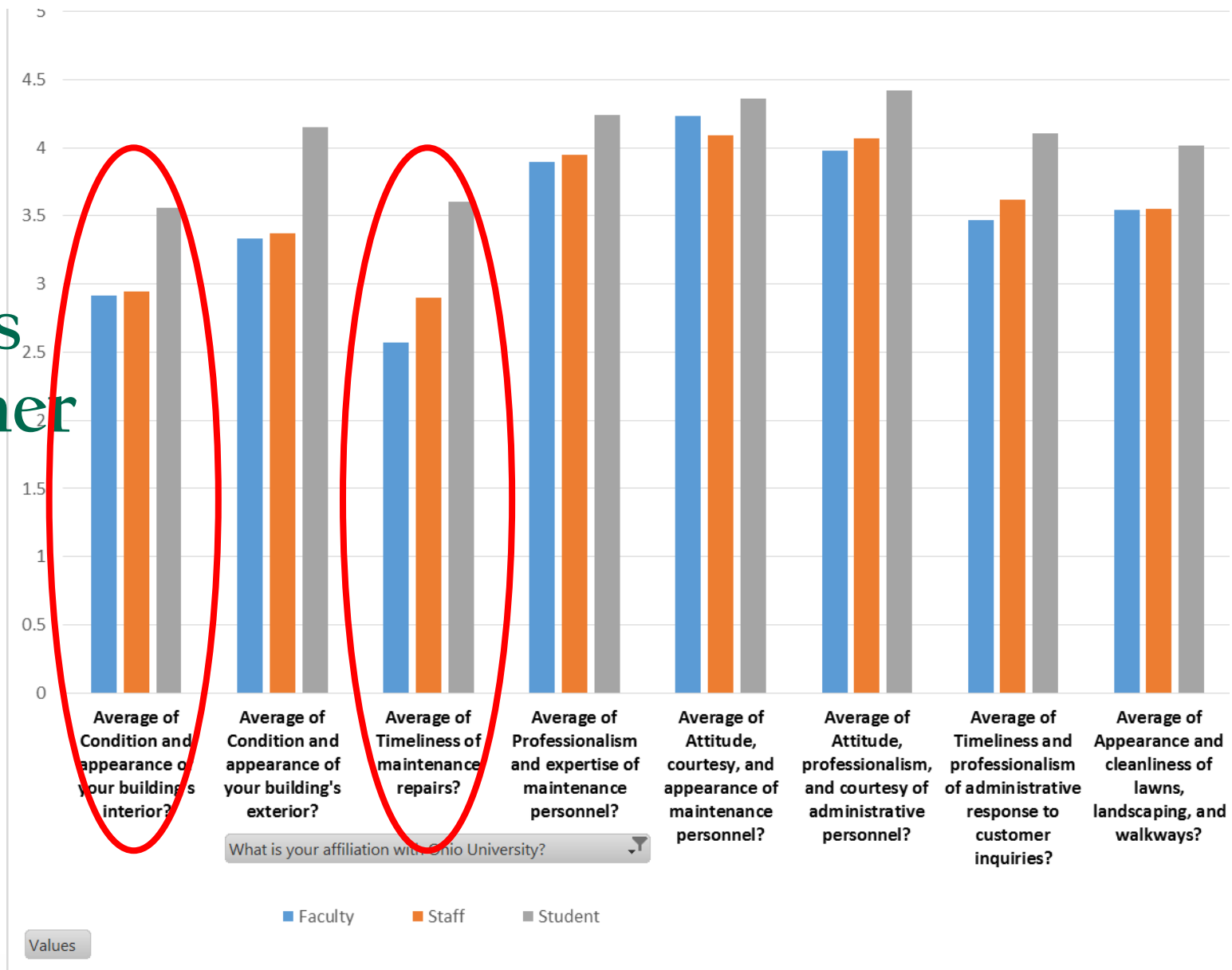
# APPA FPI



- Association of Physical Plant Administrators (APPA) perform an annual operational performance comparison for member institutions that volunteer to participate
  - Submission made in December 2016  
Results expected late summer 2017
  - Enables us to compare our performance in several areas to peer institutions
  - Data provided included recent customer and employee survey results



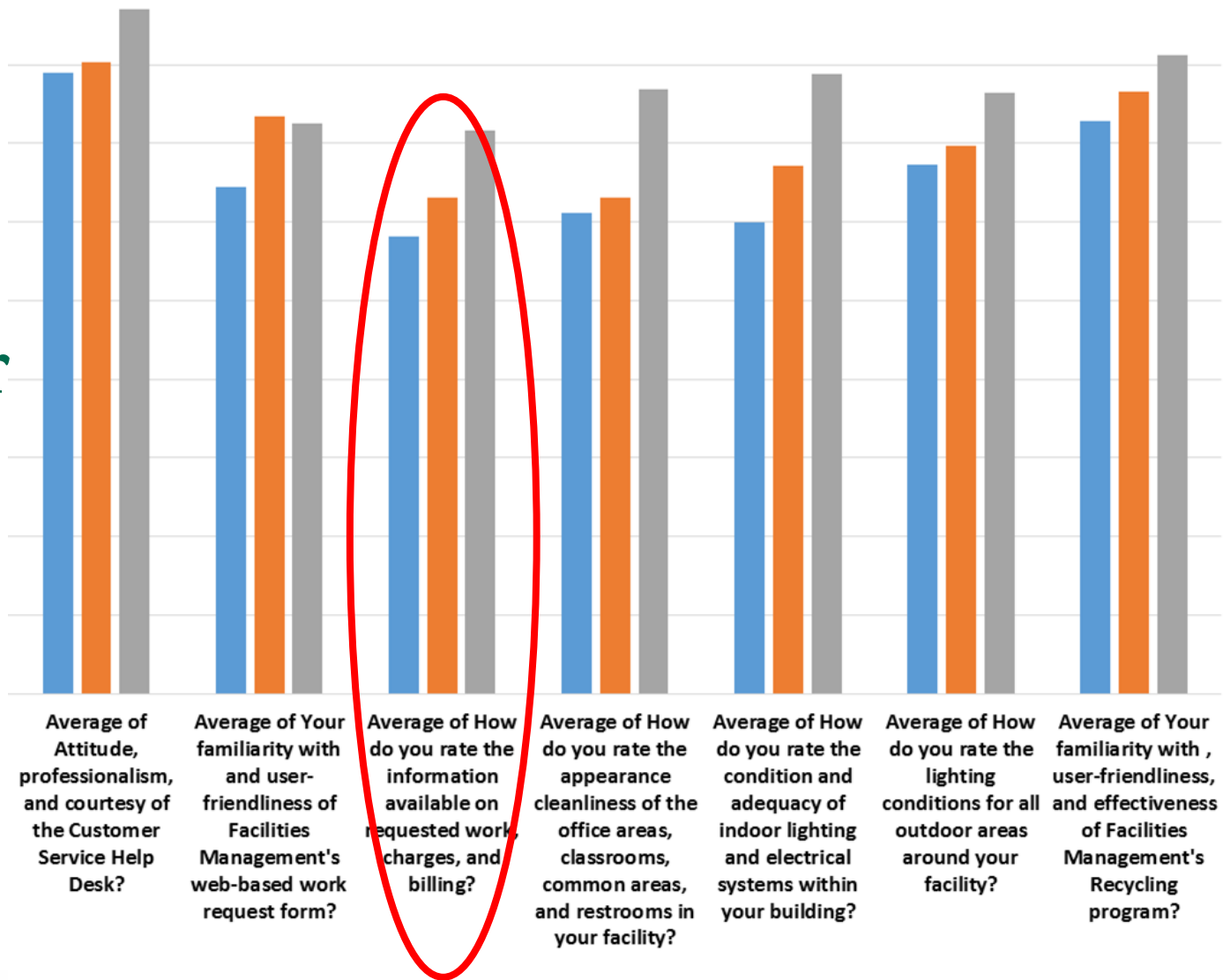
# Athens Campus Customer Survey Results



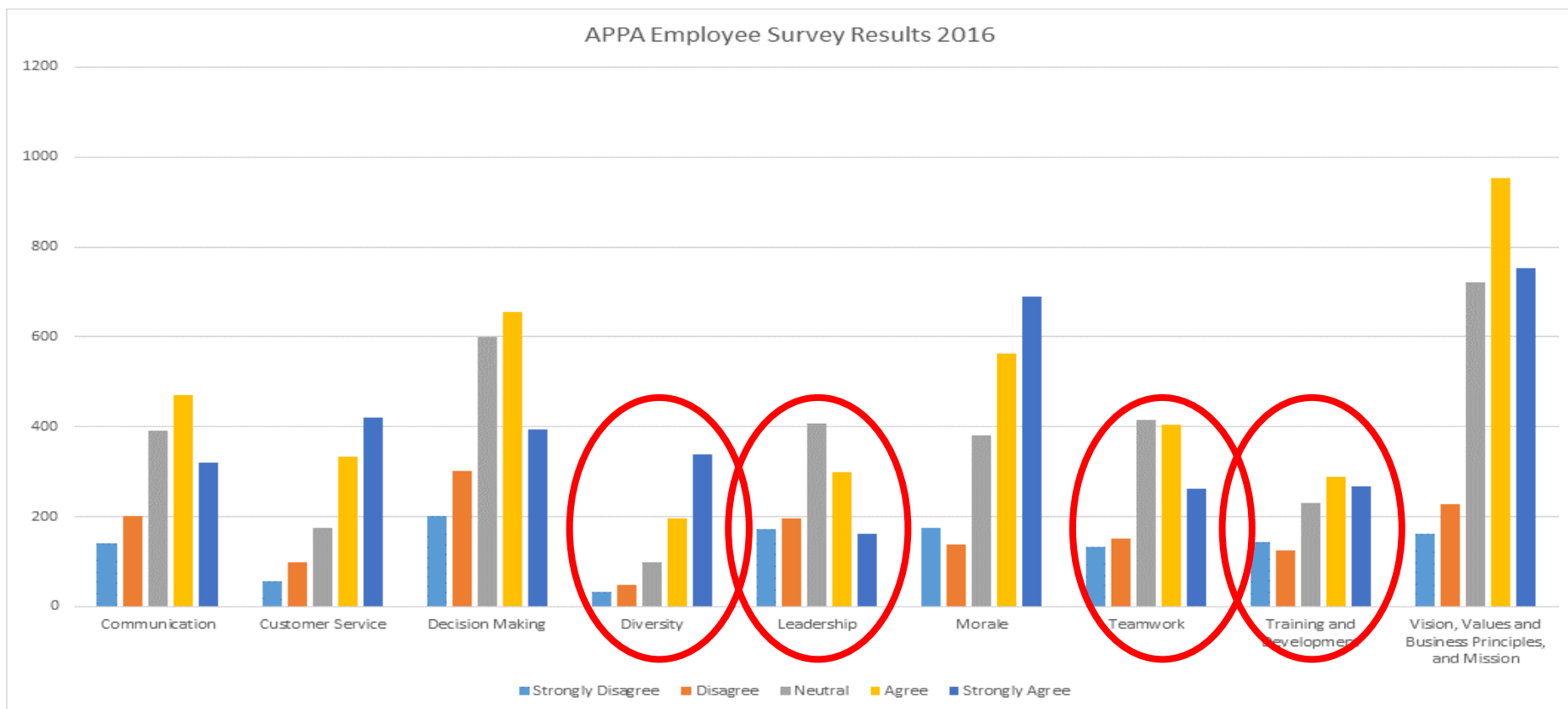
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507 surveys returned

# Athens Campus Customer Survey Results



# FMS Employee Survey Results



# Way Ahead

- Continue to develop SLAs
- Review operational performance metrics with peer institutions when they become available
- Future Items
  - Building Manager, or similar, program
  - Mechanism for information sharing outside of direct customer



# Questions?

Steve Wood

740-593-2726



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# Procure to Pay Partner Group

Laura Nowicki, Procurement and Contract Services



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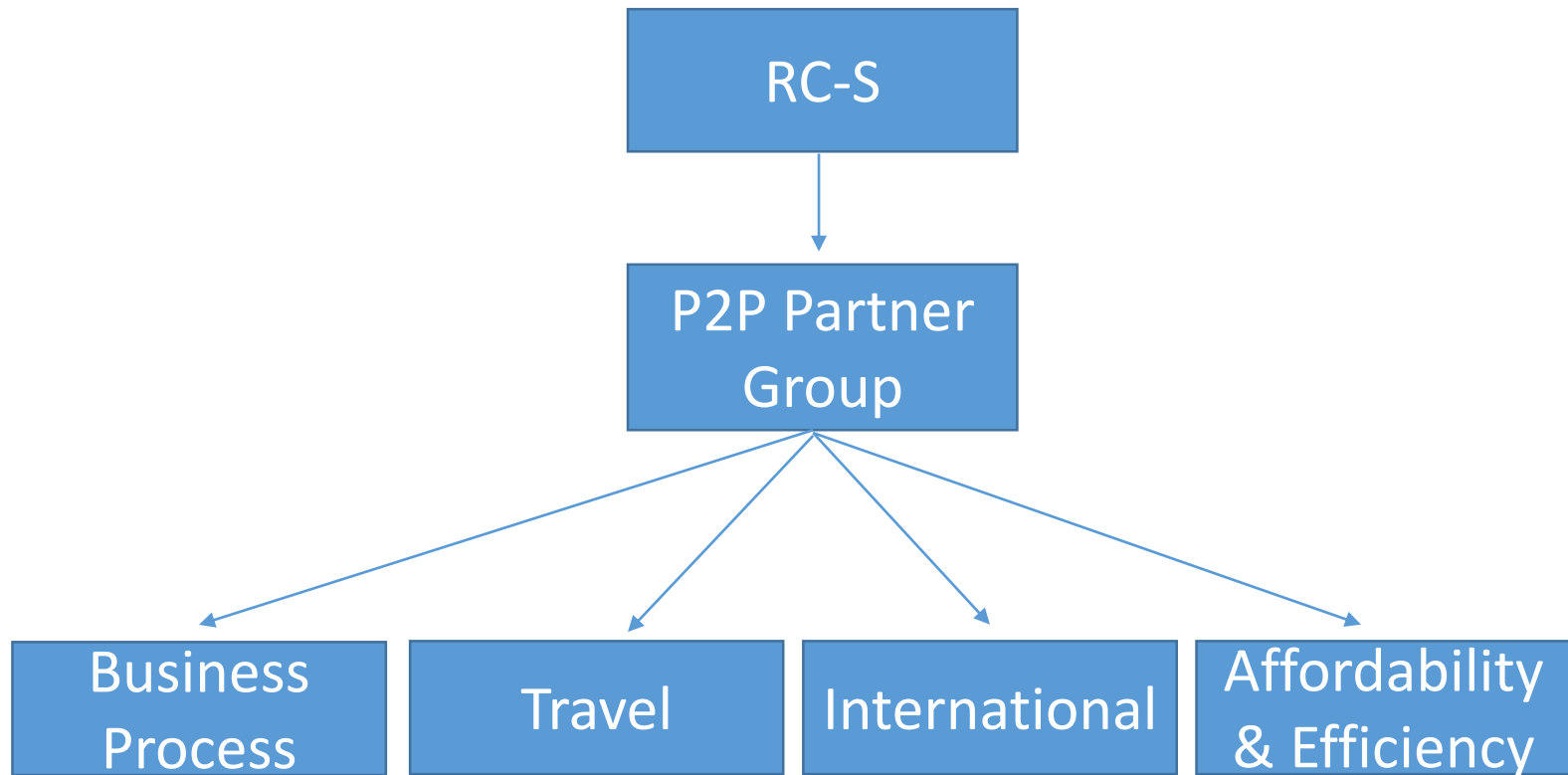
# Procure to Pay (P2P) Partner Group

- P2P Partner Group will go on hold temporarily
- Four related Work Groups created which will fold back into the P2P Partner Group once charge is complete
  - Business Process Work Group
  - Travel Work Group
  - International Work Group
  - Affordability & Efficiency Work Group





# How it functionally works



# Focus of P2P Work Groups

- Business Process
  - Internal process improvements to streamline activities
  - Identify and implement best practices
- Travel
  - Identify issues with current travel procedures
  - Explore one vendor solution
  - Create path for easy payment and processes while reducing the number of PCards
  - Establish travel policy
- International
  - Identify associated procurement issues with international vendors and persons needing payment
  - Create system and/or process for international purchasing
  - Review requirements for International Travel
- Affordability & Efficiency
  - Develop plan to fulfill Governor's Mandate for preferred vendor usage
  - Determine exemption parameters for research items and other special needs



# P2P Work Group Members

| Business Process | Travel Process     | International   | Affordability & Efficiency |
|------------------|--------------------|-----------------|----------------------------|
| Sue Jago         | Catherine Marshall | Bob Stewart     | April Ritchie              |
| Beth Tragert     | Cindy Smith        | Cary Frith      | Becky MacCombs             |
| Cindy Strickland | Cindy Strickland   | Denver Miller   | Diana McGrew               |
| Diana McGrew     | Greg Jolley        | Diane Cahill    | Gwyn Scott                 |
| Emily Chapman    | Phil Taylor        | Ed Yost         | Heather Krugman            |
| Erin Robb        | Rosanna Howard     | Howard DeWald   | Mike Finney                |
| Gwen Whitehead   | Shannon Bruce      | John Biancamano | Shelley Ruff               |
| Jill Nice        | Shawn Ostermann    | Luanne Bowman   | Steve Wood                 |
| Keith Leffler    | Sue Jago           | Sue Jago        | Tim Knavel                 |
| Kelly Gorscak    | Tia Barrett        |                 |                            |
| Shari Gillispie  | Tim Knavel         |                 |                            |
| April Ritchie    | Wayne Chiasson     |                 |                            |



# Questions?

Laura Nowicki

[nowicki@ohio.edu](mailto:nowicki@ohio.edu)



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# Post Awards and Grants Partner Group

Michael Finney, Voinovich School

Cindy Perry, Grants Accounting

Mo Valentine, Office of Research and Sponsored  
Programs



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# Agenda

- Grants Module Sponsored Projects – Cindy Perry
- Procurement – Micro-purchases – Cindy Perry
- Air Fare and Fly America Act– Mike Finney
- Salary Distribution Process by Depts – Mike Finney
- Direct Charging Administrative Staff – Mo Valentine
- Office of Research and Sponsored Programs  
Reorganization – Mo Valentine



# Grants Module – Sponsor Projects

- Completing Design phase of Grants Module for Sponsored awards.
- Reviewed Award Screen with Post Awards and Grants Partner Group.
- Drafted Template of the screens for each part of the set up process which has been vetted with Management.
- Test Conversion of Fund Type-Fund-Org-Project-Task to:
  - Grants: Project-Task-Award
- B. Existing Natural Accounts will map to:
  - Grants: Expenditure Type



# Award example for Sponsored

**Award Management**

Operating Unit: **Ohio University Opera**

Number: **1024637**  Template

Short Name: **MRI ACQUIRE PLANT**

Full Name: **MRI ACQUIRE PLANT GROWTH C**

Start Date: **01-SEP-2013**

Close Date: **30-NOV-2016**

Purpose: **15 RESEARCH**  Revenue Hard Limit

Organization: **04090 ENVIRONMENT**  Invoice Hard Limit

Award Amount: **777,954.00**

Funding Source Name: **NATIONAL SCIENCE F**

Funding Source Award Number: **DBI-1337443**

Pre-Award Date:

End Date: **31-AUG-2016**

Award Type: **441700 NSF**

Status: **Active**

Funded Amount: **777,954.00**

[Funding Summary](#)

Installments | Terms and Conditions | Budgetary Control | Funding Source Details | Contacts | Personnel | Compliances

| Number    | Issue Date         | Type         | Description                                     | Active                              | Billable                            | I                        | J                        |
|-----------|--------------------|--------------|---|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| <b>01</b> | <b>01-SEP-2013</b> | <b>Award</b> | <b>Partial Award - MRI Acquire Plant Growth</b> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
|           |                    |              |   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |
|           |                    |              |   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |

[Reports](#) [Project Funding](#)





# Procurement – Micro-purchases

- Uniform Guidance Procurement standards 2 CFR 200.320(a), *Procurement by micro-purchases* will be extended to July 1, 2018 by Office of Management and Budget (OMB) and require three quotes for purchasing items \$10,000 or more once the federal register is published.
- The recent legislative action will also allow for a higher threshold as determined by the head of the relevant executive agency which will be consistent with audit findings, institutional risk assessment or State law.
- The Council on Governmental Relations (COGR) has advocated for these changes which should be issued soon in a Federal Register.
- As of January 30, 2017 there has been a regulatory freeze on these regulations to give the new administration time to review.



# Airfare and Fly America Act

- Uniform Guidance requirements (2 CFR 200.474.3(d))
  - Airfare costs in excess of the lowest economy fare class is unallowable. The following are a few examples of exceptions that must be thoroughly documented:
    - Require circuitous routing
    - Require travel during unreasonable hours
    - Excessively prolong travel
- Fly America Act requirements state the following:
  - Any foreign air travel that is financed by federal funds must be booked on U.S. Flag Air Carriers, regardless of cost or convenience. It is highly recommended that you book your international travel, when federally funded, through ALTOUR.
- The following website has information on this guidance:  
<https://www.ohio.edu/finance/GCA/sponsor-travel-guidance.cfm>



# Salary Distribution Departments

- Committee discussed the processes used by departments to ensure that staff and faculty are correctly charged to grant accounts
  - Departments review the PAY M940 (payroll) reports to verify charges to their grant accounts
  - Review grant budgets for summer salaries and academic year charges – discussions with Principal Investigators to verify amounts
  - Some do monthly payroll transfers of faculty and staff based on actual hours worked on each grant – “After the fact Activity Report”
  - Important that department administrators are aware of every grant that includes faculty or staff from their unit
  - Ensure payroll is distributed by June 2 close tentative deadline July 18, 2017



# Direct Charge Administrative Staff

- The Uniform Guide allows the direct charging of administrative staff only if all of the following conditions are met:
  1. Services are integral to a project or activity;
  2. Individuals involved can be specifically identified with the project or activity;
  3. Such costs are explicitly included in the budget or have the prior written approval of the Federal awarding agency, and;
  4. The costs are not also recovered as indirect costs.
- The committee is still discussing the complex processes necessary to accommodate situations in which these conditions are clearly met.



# ORSP Update

- ORSP Service Center
  - Users can now create their own service tickets from LEO
- New look for the ORSP Website
  - Easier to navigate
  - Content updated and organized to match the ORSP reorganization cradle to grave concept
- Training material for research administration is being developed with central staff. These will be rolled out to the greater research community as they become established.



# Questions?

Cindy Perry ([perryc@ohio.edu](mailto:perryc@ohio.edu))

Michael Finney ([finney@ohio.edu](mailto:finney@ohio.edu))

Mo Valentine ([valentip@ohio.edu](mailto:valentip@ohio.edu))



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# Financial System Enhancements (FSE)

**Julie Allison:** Assistant Vice President, Finance

**Leigh Casal:** Change Management Associate, Finance & Administration



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# Agenda

- Financial Project Updates & Milestones
- Mapping Updates
- Training and Communication Update
- Questions?





# FSE Project Updates & Milestones

- FSE project will launch in November 2017
  - Rollout plan will be announced in summer 2017
- Major Milestone: GL Conversion completed in February
  - Begin testing & interacting with real data in the new structure with pilot groups
  - Allows other units to review initial mapping and provide feedback for March conversion
  - Mapping is iterative until go live
- Release HR/Payroll Reporting OBI dashboard in early 2017
  - Employee Information and Payroll Expense Distribution and other reports/dashboards as subject areas are moved to the Data Warehouse
  - Pilot group / Work Group currently being identified to help ensure dashboards meet campus needs
  - Early release of HR dashboards will allow users to become familiar with the use of dashboards in OBI
- Financial OBI Dashboard planning – February 2017
- Grants OBI Dashboard planning – February 2017



# Mapping Updates

- General Ledger (GL) Combinations – February 2017
- Grants Accounting Combinations – spring 2017
  - Internal Awards March 2017
  - Sponsored and Capital Projects – Conversion handled by Finance
- Object Codes – February 2017
- Activity Segments – WIP, finalizing through mapping
  - Determine if there are shared requests among planning units
  - Seeking clarification from planning units
  - Establish 1<sup>st</sup> Draft of Shared Activity Codes to be vetted with FSE Partner Group
- Functions – 1<sup>st</sup> Draft vetted with COA Partner Group
  - Discussing training options for function with COAPG
- Cross Validation Rules – begin February 2017



# Change Management

- Training Schedule
  - Vetting with RC Strategy & Change Network in February
  - Publish Training Schedule in spring
- Financial Systems Website
  - Centralized login to all Finance & HR related systems
  - Links to information on all Financial System Enhancements (OBI Dashboards, Oracle Grants Accounting, Financial Approvers and access to the COA Redesign Site)



# 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](mailto:COA@ohio.edu)



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# Training Advisory Council



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# Training Advisory Council Representation

- Co-Chairs
  - Lewis Mangen, Organizational & Talent Development
  - Amanda Davis, Communication & Training
- Administrative Senate
  - Wendy Rogers, Senator At Large
  - Eileen Theodore-Shusta, Senator At Large
- Classified Senate
  - Cheri Sheets, Senate Secretary
  - Sharon Romina, Senate Chair-Elect
- RC Strategy
  - Phil Taylor, College of Business
  - Kari Saunier, College of Fine Arts



# Training Advisory Council Charge

## **Provide insight and guidance to support the following:**

- Institutional support for training and development
- Elimination of systemic barriers to development
- Creation of a robust structure to implement a sustainable environment for training and development
- Consistent, positive and professional training and development experiences aligned with our desired culture
- Methods and resources for those new to their position
- Leveraging collective resources and expertise from around the university to support professional development



# Questions?

Training Advisory Council Co-Chairs:

Lewis Mangen, Organizational & Talent Development

[mangen@ohio.edu](mailto:mangen@ohio.edu)

Amanda Davis, Change Management & Communication

[davisa6@ohio.edu](mailto:davisa6@ohio.edu)



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# Finance Website Redesign

- Goal: Create a more customer friendly site
- Kicked off in December
- Survey sent to gather end user feedback
  - Email, *Business Matters & Compass*
  - [Finance Website User Survey](#)
  - Please complete by Friday 2/13
- February: Focus Groups
- Plan to go live by summer



# Questions

*Any questions?*

- Jennifer Cochran  
740-593-9643  
[cochraj1@ohio.edu](mailto:cochraj1@ohio.edu)



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# Equipment Inventory

Kris Sano

Finance

General Accounting & Financial Reporting



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# Policy 19.054 Equipment Inventory Control

- Capitalization threshold updated to \$5,000
- Processes were removed from the policy and are now referenced under the Procedures section of the policy and on GAFR website

<https://www.ohio.edu/finance/equipmentinventory/index.cfm>

- Policy also applies to Sponsor Owned Equipment (Red Tag Items). Procedures for this are referenced in policy and available on Grants Accounting website

<https://www.ohio.edu/finance/equipmentinventory/eirentag.cfm>

- Outlines responsibilities of the department/planning unit for reporting equipment changes and certifications
- Changed the form names:
  - EI-8 form now called Equipment Status Change form
  - EI-9 for now called Request to Take Equipment Off Campus
- Streamlined reporting process when equipment is sent to Surplus Property
- Physical inventory counts of equipment inventory (cycle counts)
- Policy should be effective sometime in March once 30 day comment/review period is complete



# Questions?

James Bond ([bondj2@ohio.edu](mailto:bondj2@ohio.edu))

Kris Sano ([sanok@ohio.edu](mailto:sanok@ohio.edu))



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# Electronic I-9 Implementation



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# Electronic I-9 Implementation

- As discussed, the paper I-9 forms will be replaced by an electronic solution
- Expected outcome in implementation:
  - more timely completion of I-9 form
  - reduction in errors
  - increase in compliance
- OHIO will begin using this system on March 6, 2017



# I-9- Basic Functionality

- New hires will be given a planning unit specific link to complete Section 1 of the I-9 via an offer letter.
- New hires will be instructed to fill out Section 1 and to bring their required documents to prove identity and eligibility to work to a location on their first day of employment. (No change in process in terms of where employees should report to complete the I-9).
- UHR or departmental representatives will log in to the I-9 system and complete Section 2 of the I-9 electronically.





# I-9- Training

- Multiple sessions offered February 20-March 3 (including session via Adobe Connect)
- All individuals trained to complete student hires will receive a link to sign up for training
- HR Liaisons are working with planning unit representatives to identify others who complete I-9s for non-student hires
- Individuals will receive links to sign up for training on February 15
- If you are interested in training, but do not receive a link to sign up, please contact UHR at [uhr@ohio.edu](mailto:uhr@ohio.edu) or (740) 593-1636



# I-9- Other Considerations

- UHR will update offer letter templates to include the link for new hires to complete the I-9
- HR Liaisons will work with planning units to assist in updating any faculty or student offer letters with the appropriate link
- UHR is working with the Provost's Office to update the standard templates on the Provost's site
- The specific links will be developed and distributed for incorporation into offer letters the week of February 20
- UHR will work closely with any units that conduct "mass hire" events to assist with incorporating new technology into process



# I-9 Implementation Timeline

- February 8-13: individuals needing training are identified
- February 15: training registration link will be sent out to those identified
- February 20-March 3: training occurs
- February 20- ongoing: UHR works with planning units to update offer letter templates
- March 6: GO LIVE!



# Questions?

- Nick Wortman, Director HR Services  
[wortmann@ohio.edu](mailto:wortmann@ohio.edu)
- Shellie McVey, Senior HR Service Center Specialist  
[mcveyr@ohio.edu](mailto:mcveyr@ohio.edu)
- Your HR Liaison
- [Uhr@ohio.edu](mailto:Uhr@ohio.edu) or 740-593-1636



# Q&A

## Next Business Forum

Thursday, May 10, 2017

10:00 AM - 12:00 PM

Baker University Center 240



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