Welcome to the
OFFICE OF BUSINESS & FINANCE
Agenda

B&F Culture
▪ Mission, Vision, Values
▪ Employee Wellness & Belonging

Who we are
▪ Our University Role
▪ Business Unit Structure
▪ Leadership & Initiatives
▪ Financial Summary

Onboarding Resources
▪ Human Resources & Training
▪ IT Services
▪ Resources
UNIVERSITY VISION
The Ohio State University is the model 21st-century public, land grant, research, urban, community-engaged institution.

UNIVERSITY MISSION
The university is dedicated to:

▪ Creating and discovering knowledge to improve the well-being of our local, state, regional, national and global communities;

▪ Educating students through a comprehensive array of distinguished academic programs;

▪ Preparing a diverse student body to be leaders and engaged citizens;

▪ Fostering a culture of engagement and service.

▪ We understand that diversity and inclusion are essential components of our excellence.

BUSINESS & FINANCE MISSION
The Office of Business and Finance is:

▪ Focused on operational excellence and resource stewardship, among the pillars of Ohio State’s shared values;

▪ Providing financial support for our ambitions as a national flagship public research university.

▪ We work to protect and grow the resources available to invest in teaching, learning, research and patient care.
B&F Culture

B&F staff members are essential to successfully achieving the university’s vision and mission. The B&F leadership is committed to timely, transparent communication, which supports the university’s land grant mission while also supporting a culture of inclusivity and wellness.

- The B&F Bulletin provides staff with timely messages from the CFO, key university updates and resources for staff.
- Quarterly Town Halls feature financial and operational updates in addition to guest speakers and topics from the Diversity, Equity & Inclusion Committee, Wellness, Pelotonia, Bucks for Charity and others.
- Staff members are encouraged to recognize their peers exhibiting outstanding service, innovative problem solving and other leadership by nominating colleagues for the B&F Big Shoutout.
**B&F Engagement Committees**

**WELLNESS COMMITTEE**

- With the support of the university’s robust wellness resources within the Office of the Chief Wellness Officer, the committee’s early accomplishments included providing stand-up desks to all B&F staff who wanted one, increasing communications of wellness activities and the reaffirmation of support from senior leadership.

- The committee’s continued efforts in amplifying wellness resources were featured in the 2021 Wellness Innovator Spotlight, which highlighted many of B&F’s wellness initiatives including:
  - Dedicated wellness topics at the unit’s monthly town halls featuring resources such as “Just Breathe” demonstrations, EAP (Employee Assistance Program) and Health Athlete presentations.

B&F Wellness Committee goals and committee roster can be found [here](#).

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**DIVERSITY, EQUITY & INCLUSION**

- In September 2020, the B&F Diversity, Equity & Inclusion Committee was formed, chaired by Michael Papadakis, CFO & Senior Vice President, with committee members representing all areas and levels throughout the unit.

- Tasked with the creation of actionable plans and metrics in alignment with the university goals, the B&F Committee meets monthly to provide tangible plans for implementation, which include the following initiatives:
  - Established initial plan for The Business & Finance, Diversity, Equity, and Inclusion Internship Program in partnership with Fisher College of Business office of Diversity & Inclusion.
  - Established required training for all B&F Staff (Diversity Basics) and for all B&F managers (Navigating Difficult DEI Conversations). Created B&F DEI Guide to help facilitate open dialogue and provide additional DEI resources to B&F staff.
  - Created Workday report on diverse supplier spending in order to help set and track unit-specific goals and published supplier diversity database.

B&F DEI Committee goals, accomplishments and committee roster can be found [here](#).
Who We Are
Enterprise Organizational Chart

The Ohio State University

University

Health System

OSU Physicians

Colleges

Support Units
The Office of Business & Finance (B&F) consists of 306 staff across six units encompassing the university’s budget, financial operations, treasury and debt financing needs, investments, internal audit, risk management and energy management needs.
Executive Leadership

Michael Papadakis
Senior Vice President and CFO
papadakis.6@osu.edu

Michael Papadakis leads all financial activities and oversees a $8 billion annual budget as the senior vice president of business and finance and chief financial officer for The Ohio State University. Mike is focused on advancing the university’s mission through operational excellence and resource stewardship, including efficiencies and innovative funding sources.

He began as Ohio State’s vice president and treasurer in 2011, and has been serving as the university’s senior vice president and CFO since February 2018. As CFO, Mike oversees offices including business advancement, financial operations, internal audit, investments, risk management, treasury and the Wexner Medical Center CFO.

Mike led the university’s team on the $1.165 billion comprehensive energy management partnership, which represents the largest-ever investment in Ohio State’s academic mission. The university has invested most of the funds in endowments that support student scholarships, teaching excellence and other academic priorities. The partnership is also improving the sustainability of the Columbus campus — with work underway to improve building energy efficiency by at least 25 percent within 10 years — and creating a $50 million energy innovation center to advance discoveries to market.

Some of his other accomplishments at Ohio State include the $483 million campus parking concession, 20-year wind power purchase agreement, and agreements with Apple, Coca-Cola, Huntington Bank and NIKE that support the academic mission in various ways. Mike has utilized his capital markets expertise to provide the university with access to affordable financing for projects such as the North Residential District. Capital highlights include the issuance of the university’s century bonds and subordinated housing bonds, and the establishment of a corporate “shelf-like” registration process, which has been utilized for a $600 million round of financing. Mike serves as a board member of the OSU Wexner Medical Center, Transportation Research Center, Rev1 Ventures, Oval Limited, Sci-Tech, Ohio State Innovation Foundation, OSU Health Inc., OSU Health Plan, OSUP and Campus Partners.

Prior to joining the university, he served as a director of energy investment banking at KeyBanc Capital Markets. Mike held previous roles in corporate tax at Deloitte and strategic business valuation at Arthur Andersen.

Mike earned his MBA in Finance from the Fisher College of Business at The Ohio State University and a BBA in accounting from the University of Cincinnati. He also completed the General Management Program at Harvard Business School. Mike is a CPA (inactive).

Mike resides in New Albany with his wife, Kennia, and two daughters, Gabriela and Anna.
Leadership Team

Anita Bratcher
Executive Assistant to SVP & CFO
Bratcher.1@osu.edu

Karina Sampei Brown
Director of Communications
brown.6084@osu.edu

Kelly Des Roches
Chief of Staff
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Kristine Devine
Vice President of Operations and Deputy CFO
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Scott Potter
Senior Director, Comprehensive Energy Management
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Kevin Patton
Chief Audit Executive
patton.89@osu.edu

Xen Riggs
CDO & Vice President of Business Advancement
riggs.44@osu.edu

Vish Srinivasan
Vice President & Chief Investment Officer
srinivasan.260@osu.edu

Jake Wozniak
Vice President of Financial Services and Innovation, Treasurer and Deputy CFO
wozniak.20@osu.edu

Vincent Tammaro
Ohio State Wexner Medical Center CFO & Vice President for Health Sciences
tammaro.10@osu.edu

Detailed bios for the leadership team can be found at B&F Leadership.
University Business

These Business and Finance units work most closely with business officers within and outside the university to support Ohio State's mission.

<table>
<thead>
<tr>
<th>CONTROLLER</th>
<th>DEBT MANAGEMENT</th>
<th>FINANCIAL PLANNING &amp; ANALYSIS</th>
<th>FINANCIAL TRAINING</th>
<th>INTERNAL AUDIT</th>
<th>INVESTMENTS</th>
<th>RISK MANAGEMENT</th>
<th>TREASURER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services include accounting, asset management, endowment administration and tax compliance.</td>
<td>Includes internal bank, investor relations and debt funding for university capital projects.</td>
<td>Produces university operating budget and supports colleges and business units on their financial planning needs.</td>
<td>Provides training on university’s financial policies, procedures and systems for Ohio State employees.</td>
<td>Assists departments with financial/operational audits, information systems audits and compliance.</td>
<td>Manages the Long-Term Investment Pool (LTIP) and protects the value of the university endowment funds.</td>
<td>Works to proactively identify, assess, prioritize and mitigate risk on behalf of the university.</td>
<td>Provides banking services including deposits, acceptance of payment cards and receipt of electronic funds.</td>
</tr>
</tbody>
</table>
We serve the Ohio State community with the services listed below.

- Plan Travel
- Pay Tuition
- Payroll Services
- PCard Services
- University Mail Services
- Surplus Management
- Fiscal Service Center
- Procurement Service Center

More details on university services can be found at [Buy, Sell, Travel](#).
Major Initiatives

Through innovative funding, administrative efficiencies and careful resource stewardship, Ohio State is actively committed to innovative approaches to support our mission as a national flagship research university.

NEW RESOURCE GENERATION
Ohio State has generated more than $2 billion to provide ongoing support for access, affordability and excellence.

OPERATIONAL EXCELLENCE
Administrative savings have provided funding for more than 15,000 President’s Affordability Grant recipients.

INNOVATIVE INITIATIVES
Ohio State launched an unprecedented sustainability program to improve energy efficiency and fund student scholarships and faculty positions.

More details on major initiatives can be found here.
Financial Summary
Very strong year due to investment performance, focus on new revenue sources and continued momentum with the health system.

Rating upgrade from Fitch to AA+ marks first rating upgrade of the university since 2010.

Net position increased $664M bringing total to $10.3B.

Completed an economic refinancing of outstanding Series 2013A bonds resulting in over $119M in debt service savings.
Financial Health Overview (as of 03/31/2024)

Operating revenues increased $540M in the first nine months of FY24 compared to the first nine months of FY23, driven by:

**HEALTHCARE REVENUES**
$392M increase in healthcare revenues, reflecting strong growth in both oncology and non-oncology infusions and practice expansion;

**GRANTS AND CONTRACTS**
$76M increase in grants and contracts, primarily due to increases in federal grants and contracts of $44M;

**TUITION AND FEES**
$54M increase in student tuition, due primarily to resident and non-resident rate increases and a rate increase to undergraduate students not in the Tuition Guarantee;

**AUXILIARY REVENUES**
$52M increase in auxiliary revenues, primarily due to more stadium shows over the last year.
University Budget - Process Overview

- The budget planning process starts with the establishment of key drivers at both the University and Health System. The drivers are utilized to calculate budget allocations and common expenses to Colleges and Support Units and to create budgets by College/Unit. These “bottom-up” budgets are reviewed and assessed for alignment with strategic initiatives and are then consolidated. Investments in strategic initiatives are made at both the College and Unit level, and at the Central Administration level to incentivize strategic activities.

- Key Assumptions are determined for revenue and expense lines that are distributed to the Colleges, Support Units and the Health System.

- Some key drivers are reviewed and established centrally, and other drivers are processed through a rigorous shared governance process with Senate Fiscal for review and recommendations, which are forwarded to the Provost & CFO for a final decision.

<table>
<thead>
<tr>
<th>CENTRAL KEY DRIVERS</th>
<th>SHARED GOVERNANCE</th>
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<tbody>
<tr>
<td>Enrollment Plans inform Tuition/Fee Rates, which drive College-level budgets based on credit hours delivered</td>
<td>Master’s &amp; Professional Programs Differential Fees Request</td>
</tr>
<tr>
<td>Tuition &amp; Fee Rates:</td>
<td>Overhead Rates</td>
</tr>
<tr>
<td>– Undergraduate &amp; Graduate Tuition</td>
<td>Regional Campus Service Charge</td>
</tr>
<tr>
<td>– Non-Resident &amp; International Surcharges</td>
<td>Plant, Operations &amp; Maintenance (POM) Rates</td>
</tr>
<tr>
<td>– Housing, Dining &amp; Recreation Sports</td>
<td>Support Office Budget Requests</td>
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<tr>
<td>– Student Health Insurance</td>
<td>Strategic Investments</td>
</tr>
<tr>
<td>Investment Rate of Return and Endowment Distribution Formulas</td>
<td>Composite Benefit Rates</td>
</tr>
<tr>
<td>AMCP (Annual Merit Compensation Process)</td>
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</table>

- Financial, Planning & Analysis (FP&A) consolidates all College and Support Unit plans, and incorporates Central revenue and expenses to create an overall University operating budget.

- A position control process exists to validate that the position is necessary and within budget. The rigor around the process varies depending on the financial status of the College/Support Unit.

- Effective April 2024, OSU’s Adaptive Planning budget tool supports an enhanced campus position control process in Workday. The new process allows campus units to utilize position-based budgets to communicate strategic hiring plans. Central review and approval of position hires is required only for those units that have been identified by Financial Planning & Analysis as requiring financial monitoring.
FY 2025 Financial Plan: Consolidated Sources & Uses

FY 2025 Sources
$10.4B

- Health System & OSUP 55%
- Tuition & Fees 14%
- Government Appropriations 5%
- Grants & Contracts 12%
- Sales & Services 6%
- Current Use Gifts & Endowment 6%
- Other Revenue 1%
- Interest Income 1%

FY 2025 Uses
$9.9B

- Total Personnel Expense 56%
- Supplies, Services & Other 36%
- Student Aid 5%
- Fee Authorizations 1%
- Debt Service 2%
FY 2025 Strategic Investment Highlights

Academic Excellence
- With the goal to support academic excellence through faculty investments supporting teaching and research, the FY25 Plan includes incremental investments of $20.3M for faculty salary and benefits, and $12.5M for start-up packages across numerous colleges.
- The FY 2025 Plan includes funding to support the annualized impact of the market-based equity adjustments for faculty enacted in January 2024.

Research Excellence
- With a goal to achieve top ten status for national university research expenditures by growing funded research and strengthening research impact, the FY25 budget includes investments totaling $87.1M, including $73.9M in research growth initiatives in Medicine & Health Sciences, Engineering, and Arts and Sciences, and $13.2M in other investments.

Service and Clinical Excellence
- The Ohio State University Wexner Medical Center (OSUWMC) continues to reinvest projected margin in patient care and capital planning to support growing demand, including several strategic initiatives currently under construction and the development of new partnerships to continue accelerating the pace of innovation in research, education, and patient care. Our strategic growth into the surrounding communities will continue with outpatient growth being driven by the continued ramp-up of the Outpatient Care New Albany and Dublin facilities and the opening of the James Outpatient Care facility.
FY 2025 Plan - University Sources & Uses, by Fund Group

- For the FY 2025 Plan:
  - Unrestricted General and Designated funds generate a margin of $104.8M, which is mainly used for operating reserve, capital investment and strategic investments.
  - Earnings operations are planned to generate a positive margin of $23.4M, which supports capital investments.
  - Endowment and Development funds generate a margin of $32.6M mainly due to anticipated timing differences between gift receipt and spend.
  - Restricted Grants and Contracts generate a margin of $11.2M due to the timing of reimbursements on research projects.

View or download the FY25 Plan
Investments
LTIP Market Value

Fiscal Year to date 2024 the LTIP increased in value from $7.38B to $7.87B and generated $674M in investment income.
Distributions from the LTIP

Annual payments based on a five-year average.

- 4.5% distributed on an annual basis.
- Policy provides steady, reliable funding for campus priorities.

FY23 Distributions: $289.1M

- Academic Strategic Priorities: $91.2M
- Educational Support and Facilities: $66.8M
- Student Financial Aid: $53.9M
- Faculty Support: $41.7M
- Wexner Medical Center: $21.2M
- Research: $12.3M
- Public Service: $1.7M
- Pending: $0.3M
Affordability
Affordability at Ohio State

CONTROLLING TUITION

Over the last 12 years, Ohio State has had five years (FY13-FY17) of tuition freezes and seven years (FY18-FY24) of the Ohio State Tuition Guarantee providing in-state students with predictability for each entering cohort by locking tuition, room and board for four years.

Ohio State remains a strong value for in-state undergraduates, as it is the second most affordable among selective Ohio schools and more affordable than 10 of 17 Big Ten schools.

<table>
<thead>
<tr>
<th>Ohio - Resident Tuition and Fees</th>
<th>BIG10 - Resident Tuition and Fees</th>
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<tbody>
<tr>
<td>Miami</td>
<td>Northwestern</td>
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<td>BGSU</td>
<td>USC</td>
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<td>Ohio University</td>
<td>Penn State</td>
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<td>Cincinnati</td>
<td>Illinois</td>
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<td>Ohio State</td>
<td>Rutgers</td>
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<td>Kent State</td>
<td>Michigan</td>
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<td>Akron</td>
<td>Minnesota</td>
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<td>Cleveland State</td>
<td>Michigan State</td>
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<td>Toledo</td>
<td>Oregon</td>
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<td>Wright State</td>
<td>UCLA</td>
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<td>Youngstown State</td>
<td>Ohio State</td>
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<td>Shawnee</td>
<td>Washington</td>
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<td>Central State</td>
<td>Indiana</td>
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<td>Maryland</td>
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<td>Wisconsin</td>
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<td>Iowa</td>
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<td>Purdue</td>
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<td>Nebraska</td>
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All comparisons show Ohio State’s undergraduate FY 2025 proposal vs. Peers’ FY 2024 Rates
Affordability at Ohio State

EXPANDING INSTITUTIONAL AID

Since FY 2015, millions in additional need-based financial aid have supported students with the introduction of the Buckeye Opportunity Program and President’s Affordability Grants.

- **$305M** in additional need-based aid will have supported 45,000 low- and moderate-income Ohioans from 2015 to 2023.
- **58%** of Ohio State undergraduate students graduate without student loans.
- **DECREASED 9.6%** Since the advent of the Tuition Guarantee, average student debt (for those with loans) decreased 9.6% from $27,500 per student to less than $25,000 per student.
- **ELIMINATED 70%** Of all course fees in addition to waiving additional costs for students who take heavy course loads.

INSTITUTIONAL FINANCIAL AID STRATEGY

- In Autumn 2023, the university welcomed its second cohort of New First Year Students (NFYS) for the Scarlet & Gray Advantage Program. The program will include financial aid, work opportunities, career development and financial literacy components.
- The university continues its work on our Student Financial Aid Optimization project which includes the transition to the new federal Student Aid Index (SAI).

THE OHIO STATE UNIVERSITY
What impacts the need for tuition increase?

TOTAL COLUMBUS CAMPUS STATE SHARE OF INSTRUCTION (SSI) INCREASES HAVE NOT KEPT PACE WITH INFLATION.

- Inflationary cost pressures will impact commodities and labor expenses (Annual Inflation 2023: 4.1%; 36-Month: 5.6%).
- Ohio’s biennial budget language limits resident undergraduate instruction and general fee increases for fiscal years 2024 and 2025 to a maximum of 3% a one-time increase for each new first-year cohort guaranteed for 4 years, effectively a 0.75% annual rate increase.
Efficiency Savings
Efficiency Journey: Historical Milestones

**2013 - 2014**  
**The Beginnings**  
Restructured Strategic Procurement; Established OE@OSU; Launched Lean/Six Sigma Black & Green Belt training.

**2013**  
**Cost Diagnostic & Recommendations**  
Initial review identified ~$300M of savings opportunities across the University & OSUWMC.

**2015**  
**2020 Goal Setting**  
2020 Vision set a 5-year University goal to reach $200M in cumulative savings.

**2016 - 2020**  
**Additional Opportunities**  
Capture ~$530M+ in efficiencies at the University and ~$420M+ at the OSUWMC for strategic use over the next 7 years.

**2016 - 2022**  
**Comprehensive Planning & Benchmarking**  
Partnership with HelioCampus on the University side to benchmark labor costs and apply a Standard Activity Model (SAM) across nine key areas (communications, development, facilities, finance, general administration, human resources, IT, research and student services). OSUWMC continues benchmarking partnership with Vizient.

**2020 - 2022**  
**Exceeds 2020 Goals**  
Cumulative total of administrative efficiencies achieved throughout the enterprise ~$1.5B. ~$250M+ per year of reoccurring savings.

**2021**  
**A Difficult Year**  
Total administrative efficiencies of $194.8M (University) and $103.7M (OSUWMC) enabled us to re-direct funds to our core mission during an unprecedented pandemic disruption.

**2023 - 2025**  
**3-Year Goals**  
Identified 3-year efficiency targets to include colleges and support units as well as capital and the OSUWMC.
Operational Efficiency Progress Report

FY24 Q3 Operational Efficiency Progress Report

<table>
<thead>
<tr>
<th>Efficiency Savings</th>
<th>FY24 Target</th>
<th>FY24 YTD</th>
<th>Progress to Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Efficiency</td>
<td>$35M</td>
<td>$33.09M</td>
<td>94.5%</td>
</tr>
<tr>
<td>OSUWMC Efficiency</td>
<td>$30M</td>
<td>$87.23M</td>
<td>291%</td>
</tr>
<tr>
<td>Capital Efficiencies</td>
<td>$15M</td>
<td>$49.58M</td>
<td>331%</td>
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Annual Impact – Operational Efficiency

<table>
<thead>
<tr>
<th></th>
<th>FY15</th>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
<th>FY22</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Efficiencies</td>
<td>$5.2M</td>
<td>$20.2M</td>
<td>$33.4M</td>
<td>$55.3M</td>
<td>$53.0M</td>
<td>$52.7M</td>
<td>$194.8M</td>
<td>$88.3M</td>
<td>$31.46M</td>
</tr>
<tr>
<td>OSUWMC</td>
<td>$18.1M</td>
<td>$40.2M</td>
<td>$23.1M</td>
<td>$23.7M</td>
<td>$45.3M</td>
<td>$103.7M</td>
<td>$115.0M</td>
<td>$58.31M</td>
<td></td>
</tr>
<tr>
<td>Capital Efficiencies</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>$33.8M</td>
<td>$54.1M</td>
<td>$11.1M</td>
<td>$44.7M</td>
<td>$61.6M</td>
<td>$62.08M</td>
</tr>
</tbody>
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FY12-FY23 Total Efficiency Savings

<table>
<thead>
<tr>
<th></th>
<th>Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Operational Efficiencies</td>
<td>$400M</td>
<td>$535.1M</td>
</tr>
<tr>
<td>OSUWMC Operational Efficiencies</td>
<td>$261.6M</td>
<td>$471.9M</td>
</tr>
<tr>
<td>Capital Efficiencies</td>
<td>$188M</td>
<td>$267.4M</td>
</tr>
<tr>
<td>Enterprise Procurement Savings</td>
<td>$623M</td>
<td>$782.1M</td>
</tr>
<tr>
<td>Operational Excellence@OSU (Lean Six Sigma)</td>
<td>$90M</td>
<td>$96.5M</td>
</tr>
<tr>
<td>OSUWMC Pharmacy, Revenue Cycle &amp; Other</td>
<td>$255M</td>
<td>$355.9M</td>
</tr>
</tbody>
</table>

FY12 – FY23 Enterprise Efficiencies: $2.5B
Onboarding Resources
Human Resources

As of September 21, 2020, HR and payroll inquiries should be directed to HR Connection, Ohio State’s shared services operation and primary point of contact for HR and payroll needs.

QUICK LINKS

- HR New Employee Onboarding Checklist
  - Benefits Overview for new hires
  - CampusParc for parking passes
- About HR
- Career Roadmap
- Required Notices

EMPLOYEE WELLNESS

- Explore Your Plan for Health (YP4H), Ohio State’s employee wellness program that provides tools and resources for living a healthy life. YP4H gives participants an opportunity to earn rewards, including medical plan premium credit and Health Reimbursement Account (HRA) credits.
- You earn these rewards with healthy behaviors, such as completing a health assessment with biometrics, tracking physical activity and participating in wellness programs.

Portal: https://hrconnection.osu.edu
(614) 247-myHR (6947)
HRConnection@osu.edu
Compass: https://compass.osu.edu/

The HR Connection Portal is available 24/7 and the hours of operation for phone and email response is 8 a.m. – 5 p.m. Monday through Friday.

Faculty, staff, and student employees can contact HR Connection for support on a variety of HR and payroll requests.
B&F HR Contacts

**Scott Millard**
HR Business Partners (HRBP)
614-688-4252
[Millard.20@osu.edu](mailto:Millard.20@osu.edu)

**Jennifer Klipfer**
HR Business Partner (HRPB)
614-247-1966
[Klipfer.2@osu.edu](mailto:Klipfer.2@osu.edu)

HR RESOURCES

As part of the HR Service Delivery model, there are dedicated in-unit HR resources aligned to an academic, administrative, or business unit.

**HR Business Partners (HRBP)** and HR Consultants (HRC) work together to provide HR support and strategic partnership in implementing initiatives, training, recruitment strategies and more to enhance organizational performance and meet the missions and goals of each unit.

These individuals are another resource for HR support in addition to **HR Connection**, Ohio State’s shared service operation.

- View [BuckeyeLearn](#) transcript
- Review [B&F required training](#)
- Access [B&F Performance Manager tool](#)
IT Resources

Below are the essential first steps for new employees. Click on boxes to be redirected.

- my.osu.edu
  - This is where you manage your Ohio State identity.
  - Activate your Ohio State username
  - Change your password (we do this every 180 days)
  - Enter your preferred name

- BuckeyePass
  - Many Ohio State systems use BuckeyePass powered by Duo as an extra layer of security. It is quick and easy to set up/use.
  - Activate Duo
  - Download the app

- Institutional Data Policy (IDP)
  - Employees must complete IDP training annually to affirm their understanding of how to secure institutional data.
  - Read the IDP Policy
  - Complete the online course (approx. 20 min.)

- Microsoft 365
  - Ohio State uses M365 for Outlook, OneDrive, Teams, Word, PowerPoint, Excel and much more.
  - Log in to Outlook to access email
  - Store and share files on OneDrive
  - Access other needed productivity apps

Contact the IT Service Desk or call 614-688-HELP(4357) to get tech assistance or order services.
Checklist & Helpful Links

GETTING STARTED

- Familiarize yourself with the university’s New Employee Onboarding site
- Obtain BuckID, Ohio Union, 3rd floor
- Obtain parking permit, CampusParc, 1560 North High Street
- Register for BuckeyeAlert to receive safety & security updates
- Enter timekeeping and leave in Workday
- Review job aids in the Administrative Resource Center
- Subscribe to B&F Bulletin to receive news and updates from B&F leadership

BOOKMARK COMMON LINKS

- Administrative Resource Center https://admin.resources.osu.edu/
- Password Management http://my.osu.edu
- Find People www.osu.edu/findpeople
- Interactive Map https://www.osu.edu/map/
- Academic Calendar http://registrar.osu.edu/staff/bigcal.asp
- Your Plan for Health https://yp4h.osu.edu/
- BuckeyeLearn http://buckeyelearn.osu.edu
- Timekeeping and Leave support
- Leave Accrual Schedule
- Pay Date Schedule
- Create a Requisition to Purchase Goods or Services
- P-Card Information
- Create a Spend Authorization
- Create an Expense Report
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