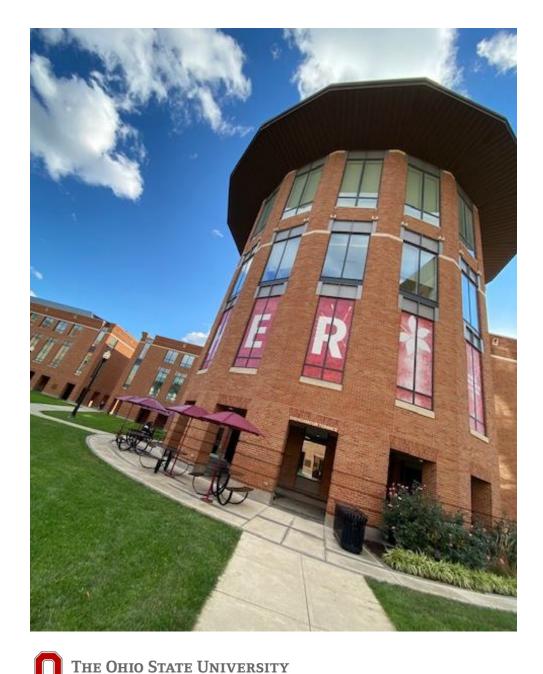


Welcome to the **OFFICE OF BUSINESS & FINANCE**







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

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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 <u>Diversity, Equity &</u> <u>Inclusion Committee</u>, <u>Wellness</u>, <u>Pelotonia</u>, <u>Bucks for Charity</u> and others.
- Staff members are encouraged to recognize their peers exhibiting outstanding service, innovative problem solving and other leadership by nominating colleagues for the <u>B&F Big Shoutout.</u>



B&F Engagement Committees

WELLNESS COMMITTEE

- With the support of the university's robust <u>wellness</u> <u>resources</u> within the <u>Office of the Chief Wellness Officer</u>, 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 <u>2021 Wellness Innovator</u> <u>Spotlight</u>, which highlighted many of B&F's wellness initiatives including:
 - Dedicated wellness topics at the unit's monthly town halls featuring resources such as "<u>Just Breathe</u>" demonstrations, <u>EAP</u> (Employee Assistance Program) and <u>Health Athlete</u> presentations.

B&F Wellness Committee goals and committee roster can be found here.

DIVERSITY, EQUITY & INCLUSION

- In September 2020, the <u>B&F Diversity, Equity & Inclusion Committee</u> 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 <u>Task Force on Racism and Racial Inequities</u>, the B&F Committee meets monthly to provide tangible plans for implementation, which include the following initiatives:
 - Established initial plan for <u>The Business & Finance, Diversity, Equity, and</u> <u>Inclusion Internship Program</u> 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 <u>B&F DEI</u> <u>Guide</u> 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 <u>supplier diversity database</u>.



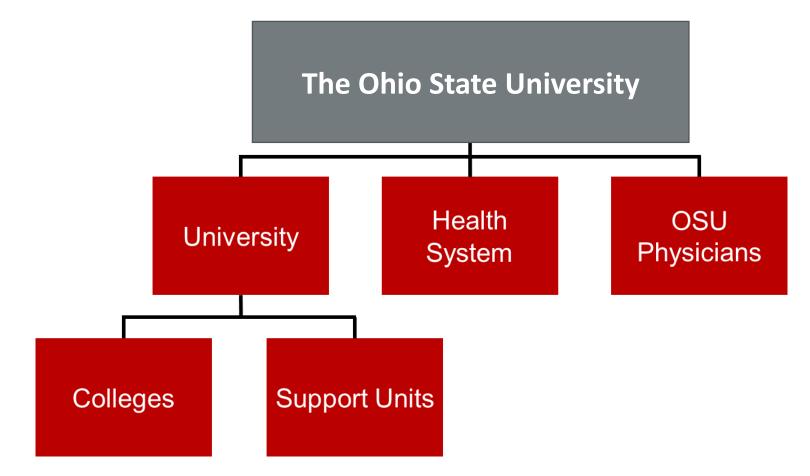
Who We Are



EMPLOYEE ONBOARDING | 2023

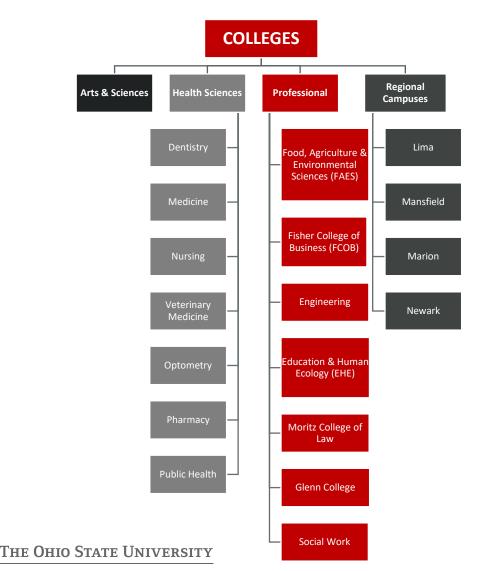
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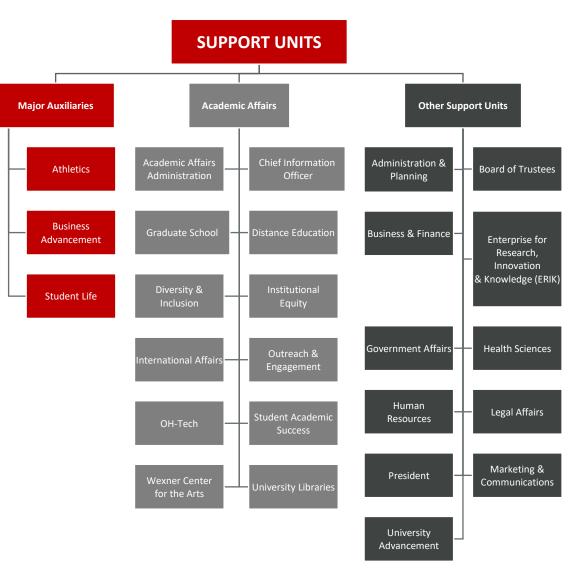
Enterprise Organizational Chart





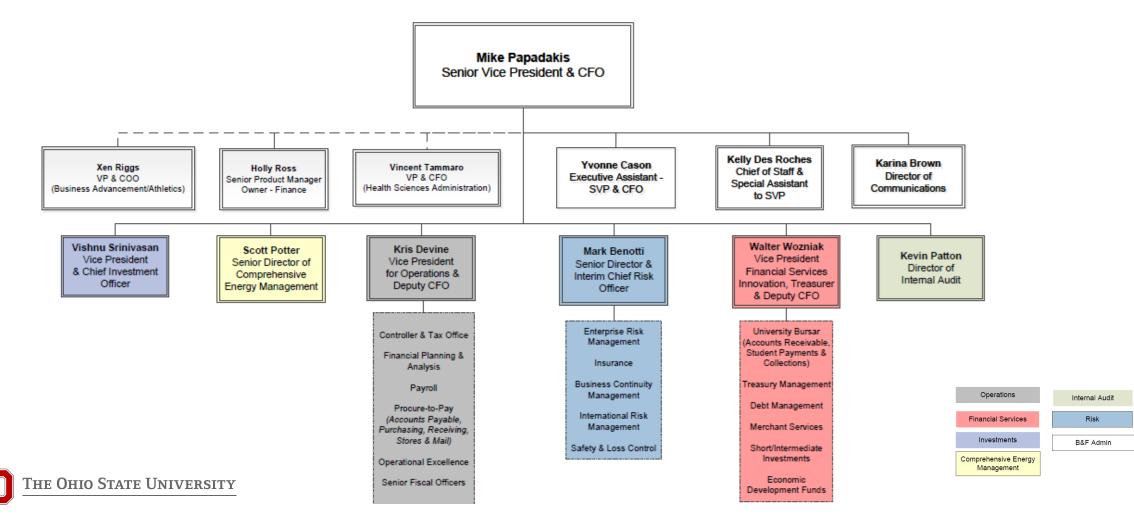
University Colleges & Support Units





B&F Unit Organizational Chart

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 Wexner Medical Center, Transportation Research Center, Rev1 Ventures, Oval Limited, Sci-Tech, Ohio State Innovation Foundation, OSU Health Inc., OSU Plan, OSUP and Campus Partners.

Prior to joining the university, he served as a director of energy investment banking at KeyBank 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



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



Von Cason Executive Assistant to SVP & CFO cason.6@osu.edu



Kelly Des Roches Chief of Staff des-roches.1@osu.edu



Kristine Devine Vice President of Operations and Deputy CFO devine.99@osu.edu



Scott Potter Senior Director, Comprehensive Energy Management potter.138@osu.edu



Kevin Patton Director, Internal Audit patton.89@osu.edu



Xen Riggs COO & 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



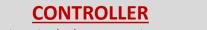
Vincent Tammaro Ohio State Wexner Medical Center CFO & Vice President for Health Sciences tammaro.10@osu.edu



Detailed bios for the leadership team can be found at <u>B&F Leadership</u>.

University Business

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



Services include accounting, asset management, endowment administration and tax compliance.

DEBT MANAGEMENT

Includes internal bank, investor relations and debt funding for university capital projects.

FINANCIAL PLANNING & ANALYSIS

Produces university operating budget and supports colleges and business units on their financial planning needs.

FINANCIAL TRAINING

Provides training on university's financial policies, procedures and systems for Ohio State employees.

INTERNAL AUDIT

Assists departments with financial/operational audits, information systems audits and compliance.

INVESTMENTS

Manages the Long-Term Investment Pool(LTIP) and protects the value of the university endowment funds.

RISK MANAGEMENT

Works to proactively identify, assess, prioritize and mitigate risk on behalf of the university.

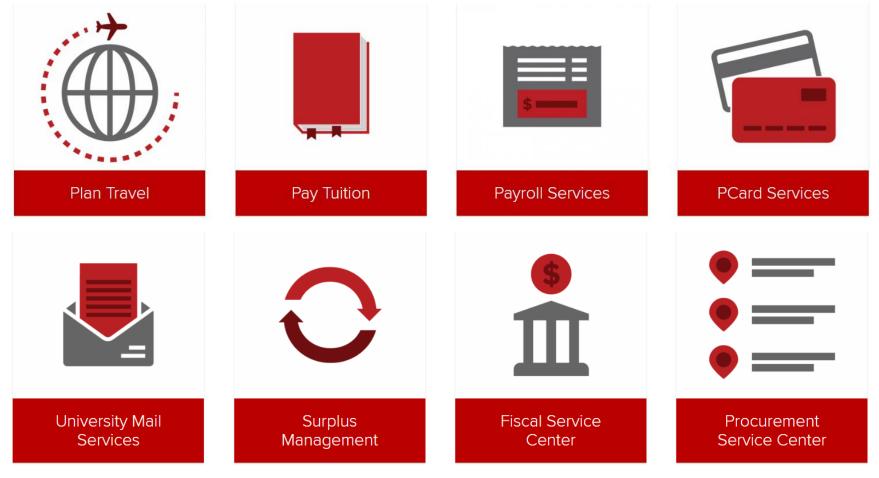
TREASURER

Provides banking services including deposits, acceptance of payment cards and receipt of electronic funds.



University Services

We serve the Ohio State community with the services listed below.



More details on university services can be found at <u>Buy, Sell, Travel</u>.



Major Initiatives

Ohio State has generated more than \$2

billion to provide ongoing support for

access, affordability and excellence.

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.



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.



Financial Summary



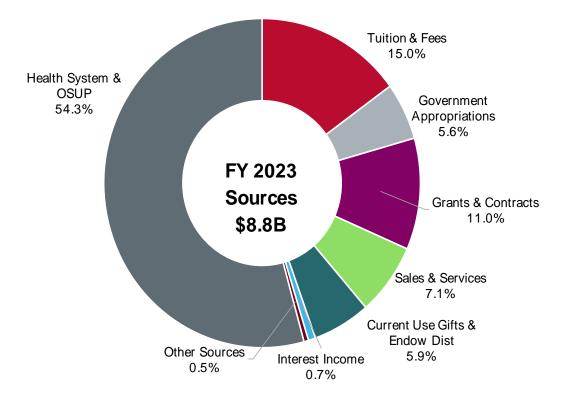
EMPLOYEE ONBOARDING | 2023

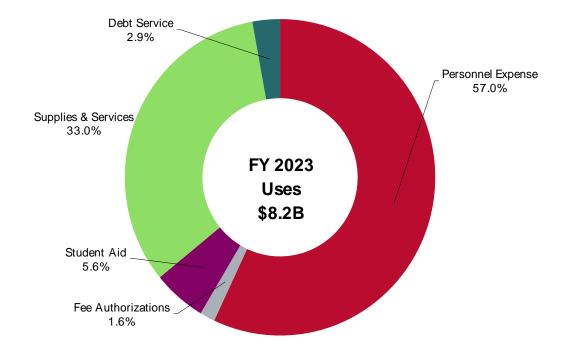
FY2022 Financial Performance Highlights

Performance, Health & Stability

- Our overall financial position has continued to improve over the last four years, including throughout the pandemic. Our size, diversity of operations and financial discipline have
 enabled us to grow and improve our overall financial position during this unprecedented time in the university's history.
- Since 2020, our total assets have grown by 21% (\$3.7B) to \$21.3B, driven mainly by strong operational performance at the University and OSUWMC, improved investment performance and a historically unprecedented capital asset construction period.
- In the same time period, our total liabilities have decreased by 1% (\$158M) to \$11.7B, driven mainly by a decline in pension and OPEB liabilities, offset by additional debt issuance.
- From an Income Statement perspective, operating revenues for both the university and OSUWMC have largely recovered to pre-pandemic levels with another increase expected in FY23.
- Achieved record year of fundraising with \$743.2M in gifts & pledges and \$510.6M in cash receipts.
- Another important driver of our overall financial performance and health has been the continuation and enhancement of our strong financial controls and our continuous drive to identify and realize significant operating and capital efficiencies across the enterprise.
- The university also took advantage of the historically low-interest rate environment last fall and issued \$600M of tax-exempt debt. The university achieved an all-in financing cost of 2.456%, its lowest-ever borrowing rate, and generated \$715.3M of net proceeds. The transaction was the second largest tax-exempt transaction of 2021 and achieved the university's first-ever 'Green Bonds' designation, reflecting the green building features of the inpatient hospital project and OSU's robust energy efficiency standards.
- The university also continues to embrace fin-tech solutions that drive efficiencies and support our constituencies wherever possible. As such, the university accepted its first cryptocurrency gift in June of 2022 and continues to make progress toward a cashless campus, instituting cashless athletic events last fall.
- Finalized Income-Tax and Property Tax Incentive agreements with the City of Columbus that will help facilitate the buildout of the Innovation District.
- University liquidity has remained very strong throughout the pandemic and continues to exceed our applicable policy and target benchmarks.
- University credit ratings of AA/AA/Aa1 were affirmed once again in FY22 and are continued evidence of our overall financial strength.

FY2023 Operating Budget





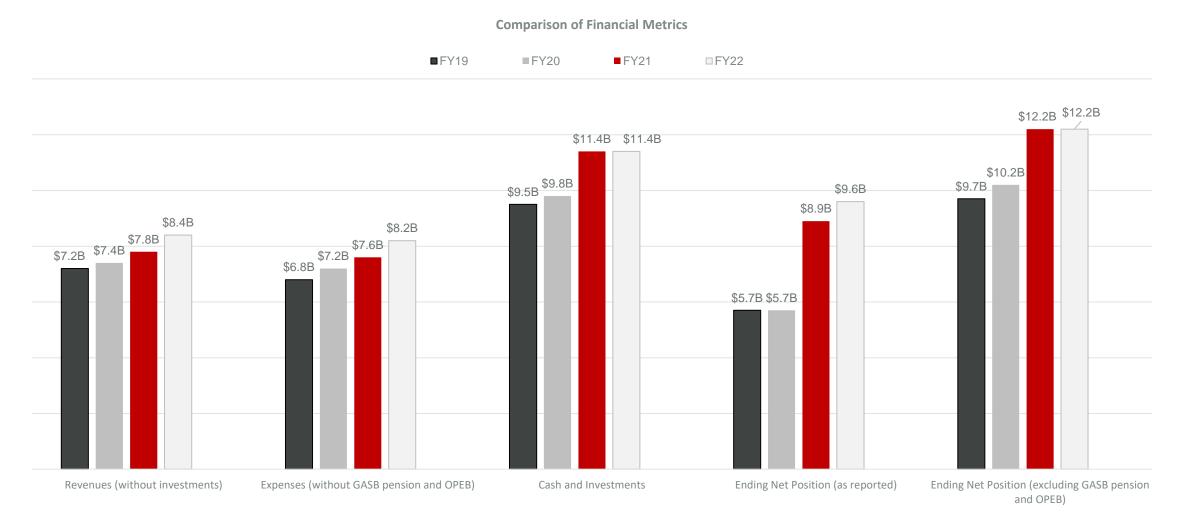
University Budget - Process Overview

- 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/Unit level and at the Central Administration level to incentivize strategic activities.
- Common 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 go through a rigorous shared governance process with Senate Fiscal for review and recommendations are forwarded to the Provost & CFO.

CENTRAL KEY DRIVERS	SHARED GOVERNANCE
 Enrollment Plans inform Tuition/Fee Rates, which drive	 Master's/Professional Programs Differential
College-level budgets based on credit hours delivered Tuition & Fee Rates: Undergraduate / Graduate Tuition Non-Resident & International Surcharges Housing & Dining Student Health Insurance Investment Rate of Return AMCP (Annual Merit Compensation Process)	Fee Requests Overhead Rates Regional Campus Service Charge Plant, Operation & Maintenance (POM) Rates Support Unit Budget Requests Strategic Investments Composite Benefit Rates

Financial, Planning & Analysis (FP&A) consolidates all College/Unit plans and incorporates Central revenue/expenses to create an overall University operating budget. In FY 2023, the University implemented Adaptive Insights, a new financial planning tool to collect Unit/College plans, which integrates data directly into Workday Finance and HR systems.

Financial Metrics Demonstrate Positive Momentum





Consolidated Balance Sheet (as of the fiscal year ended June 30, 2022)

Assets and Liabilities (\$ in millions)	2022	2021	2020
Cash and cash equivalents	\$ 911	\$ 1,214	\$ 2,433
Total investments	\$ 10,466	\$ 10,204	\$ 7,405
Capital assets, net	\$ 7,320	\$ 6,744	\$ 5,922
Pension and OPEB assets and deferred outflows	\$ 1,060	\$ 743	\$ 795
Other assets	\$ 1,543	\$ 1,566	\$ 996
Total Assets	\$ 21,300	\$ 20,471	\$ 17,551
Accounts payable and other current liabilities	\$ 1,651	\$ 1,690	\$ 1,358
Debt	\$ 3,933	\$ 3,293	\$ 3,125
Pension and OPEB liabilities and deferred inflows	\$ 3,860	\$ 4,258	\$ 5,299
Concessionaire and other liabilities	\$ 2,267	\$ 2,345	\$ 2,087
Total Liabilities	\$ 11,711	\$ 11,586	\$ 11,869

Net Position (\$ in millions)	2022	2021	2020
Ending net position (eliminate pension and OPEB)	\$ 12,211	\$ 12,226	\$ 10,189
Ending net position - pension and OPEB	\$ (2,622)	\$ (3,341)	\$ (4,507)
Total Net Position	\$ 9,589	\$ 8,885	\$ 5,682

Consolidated Income Statement

Total Revenue (\$ in millions)	2022	2021	2020
Tuition and Fees	\$ 1,003	\$ 870	\$ 954
Grants and Contracts	\$ 1,140	\$ 1,070	\$ 1,042
Sales and Services	\$ 544	\$ 355	\$ 450
Health System & OSUP Sales and Services	\$ 4,819	\$ 4,600	\$ 4,034
State Subsidies and Capital Appropriations	\$ 546	\$ 550	\$ 532
Gifts and Additions to Permanent Endowments	\$ 314	\$ 272	\$ 299
Other Revenues	\$ 70	\$ 72	\$ 115
Total Revenues (w/o investments)	\$ 8,436	\$ 7,789	\$ 7,426
Investment income	\$ (287)	\$ 1,861	\$ 233
Total Revenues (w/ investments)	\$ 8,149	\$ 9,650	\$ 7,659

Total Expenses (\$ in millions)	2022	2021	2020
University Education and General Expenses	\$ 2,889	\$ 2,732	\$ 2,717
Auxiliary Sales and Services	\$ 377	\$ 263	\$ 307
Health System & OSUP	\$ 4,236	\$ 4,020	\$ 3,645
Depreciation	\$ 508	\$ 471	\$ 435
Interest Expense on Plant Debt	\$ 155	\$ 127	\$ 118
Total Expenses (w/o pension and OPEB)	\$ 8,165	\$ 7,613	\$ 7,222
Net Margin	\$ (16)	\$ 2,037	\$ 437
Pension and OPEB expense	\$ (720)	\$ (1,166)	\$ 428
Total Expenses (w/ pension and OPEB)	\$ 7,445	\$ 6,447	\$ 7,650
Change in Net Position	\$ 704	\$ 3,203	\$ 9

Consolidated Cash Flow Statement

Cash Flow From: (\$ in millions)	2022	2021	2020
Receipts from Tuition and Grants	\$ 1,754	\$ 1,583	\$ 1,671
Receipts from Sales and Services	\$ 5,436	\$ 4,827	\$ 4,577
Payments to or on Behalf of Employees, including benefits	\$ (4,433)	\$ (4,090)	\$ (3,910)
Payments to Suppliers	\$ (3 <i>,</i> 058)	\$ (2,444)	\$ (2,159)
Other payments	\$ (90)	\$ (160)	\$ (113)
Total Operating Activities	\$ (391)	\$ (284)	\$ 66
State Share of Instruction and appropriations	\$ 546	\$ 553	\$ 533
CARES Assistance and other non-exchange grants	\$ 279	\$ 224	\$ 246
Gift receipts and additions to permanent endowments	\$ 311	\$ 235	\$ 246
Payments for purchase or construction of capital assets	\$ (1,076)	\$ (958)	\$ (795)
Principal and interest payments on capital debt and leases	\$ (230)	\$ (198)	\$ (190)
Other receipts	\$ 725	\$ 44	\$ 50
Total Financing Activities	\$ 555	\$ (100)	\$ 90
Net purchases, proceeds, and maturities from investments	\$ (477)	\$ (1,206)	\$ (73)
Investment income	\$ 10	\$ 371	\$ 144
Total Investing Activities	\$ (467)	\$ (835)	\$ 71
Net change in cash	\$ (303)	\$ (1,219)	\$ 227
Beginning Cash and Cash Equivalent Balance	\$ 1,214	\$ 2,433	\$ 2,206
Ending Cash Balance	\$ 911	\$ 1,214	\$ 2,433

THE OHIO STATE UNIVERSITY

Medical Center Consolidated Activity Summary FY22

OSUWMC Consolidated Activity Summary	Actual	Budget	Actual-Budget Variance	Budget % Variance	Prior Year	Prior Year % Variance
Admissions	58,320	66,121	(7,801)	-11.8%	62,921	-7.3%
Patient Days	434,956	448,078	(13,122)	-2.9%	437,512	-0.6%
Surgeries	51,388	52,483	(1,095)	-2.1%	50,740	1.3%
Outpatient Visits	2,255,167	2,166,176	88,991	4.1%	2,116,454	6.6%
Telehealth Visits (Includes OSUP)	165,068	-	165,068	0.0%	279,296	-40.9%
Average Length of Stay	7.42	6.76	(0.66)	-9.8%	6.94	-6.9%
Case Mix Index (CMI)	2.07	2.09	(0.02)	-0.8%	2.09	-0.9%

Operations - Health System (\$ in millions)	Actual	Budget	Actual-Budget Variance	Budget % Variance	Prior Year	Prior Year % Variance
Total Operating Revenue	\$ 3,808	\$ 3,751	\$ 56	1.5% \$	3,616	5.3%
Total Operating Expense	3,443	3,486	43	4.5%	3,128	-10.1%
Excess of Revenue over Expense	\$ 365	\$ 265	\$ 100	37.6% \$	489	-25.3%

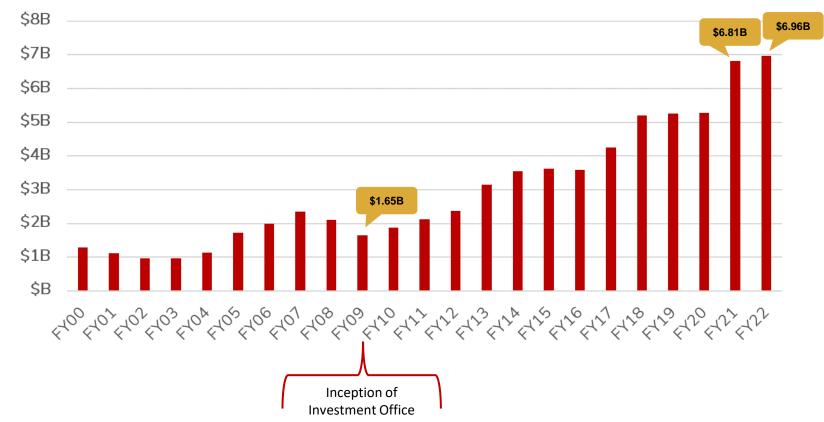
Adjusted Admissions	128,975	137,020	(8,045)	-5.9%	130,125	-0.9%
Operating Revenue per AA	\$ 29,524	\$ 27,379	\$ 2,145	7.8% \$	27,790	6.2%
Operating Expense per AA	\$ 26,274	\$ 24,319	\$ (1,955)	-8.0% \$	24,323	-8.0%
OSUP Change in Net Assets	\$ 8.7	\$ 3.9	\$ 4.8	125.0% \$	9.7	-9.9%

Investments



LTIP Market Value

For the full year of FY2022, the LTIP increased in value from \$6.81B to \$6.96B and generated \$63M in investment income.

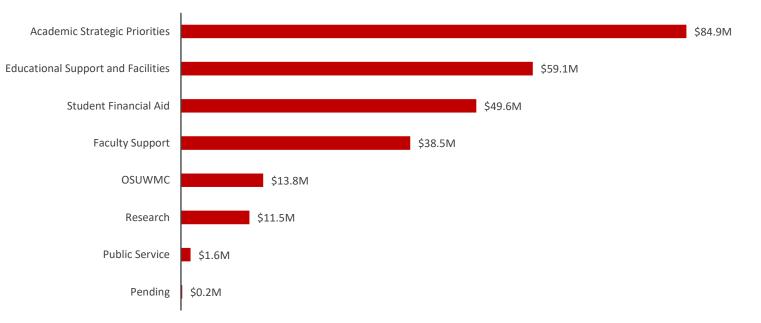


Market Value

Distributions from the LTIP

Historically annual payments were determined based on a seven-year average. Going forward they will be based on a five-year average.

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



FY22 Distributions: \$259.2M



Efficiency Savings



Efficiency Journey: Historical Milestones

2013 - 2014 2016 2020 - 2022 **Comprehensive Planning & Benchmarking The Beginnings Additional Opportunities** Partnership with HelioCampus on the University side to benchmark labor costs and apply **Restructured Strategic Procurement;** Capture ~\$530M+ in efficiencies at a Standard Activity Model (SAM) across nine key areas (communications, development, Established OE@OSU; Launched the University and ~\$420M+ at the facilities, finance, general administration, human resources, IT, research and student Lean/Six Sigma Black & Green Belt OSUWMC for strategic use over the services). OSUWMC continues benchmarking partnership with Vizient next 7 years training 2013 2015 2016 - 2020 2021 2023 - 2025 **Cost Diagnostic &** 2020 Goal Setting Exceeds 2020 Goals A Difficult Year **3-Year Goals** Recommendations 2020 Vision set a 5-year University Cumulative total of Total administrative efficiencies of Identifiedf 3-year efficiency goal to reach \$200M in cumulative administrative efficiencies \$194.8M (University) and \$103.7M Initial review identified ~\$300M targets to include colleges achieved throughout the savings (OSUWMC) enabled us to re-direct of savings opportunities across and support units as well as enterprise ~\$1.5B. \$250M+ per funds to our core mission during an the University & OSUWMC capital and the OSUWMC

year of reoccurring savings

unprecedented pandemic disruption

Operational Excellence



Enterprise Efficiencies from FY12 - FY22

The Ohio State University

Operational Efficiency Progress Report

FY22 Operational Efficiency Progress Report

Efficiency Savings	FY22 Target	FY22 Actual	Progress to Goal	Status
University	\$35M	\$88.3M	252%	
OSUWMC	\$30M	\$115.0M	383%	
Capital Efficiencies	\$25M	\$61.6M	246%	

Annual Impact – Operational Efficiency	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22
University Efficiencies	\$5.2M	\$20.2M	\$33.4M	\$55.3M	\$53.0M	\$52.7M	\$194.8M	\$88.3M
OSUWMC		\$18.1M	\$40.2M	\$23.1M	\$23.7M	\$45.3M	\$103.7M	\$115.0M
Capital Efficiencies	NA	NA	NA	\$33.8M	\$54.1M	\$11.1M	\$44.7M	\$61.6M

FY12-FY22 Total Efficiency Savings	Target	Actual
University Operational Efficiencies	\$375M	\$502.7M
OSUWMC Operational Efficiencies	\$261.6M	\$440.2M
Capital Efficiencies	\$158M	\$205.3M
Enterprise Procurement Savings	\$620M	\$689.9M
Operational Excellence@OSU (Lean Six Sigma)	\$90M	\$96.5M
OSUWMC Pharmacy, Revenue Cycle & Other	\$255M	\$355.9M

FY12 – FY22 Enterprise Efficiencies: \$2.3B

New 3-Year Efficiency Target Detail



The Ohio State University

■ University - Colleges ■ University - Support Units ■ University - Central ■ OSUWMC ■ Capital

Onboarding Resources



EMPLOYEE ONBOARDING | 2023

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Human Resources

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

QUICK LINKS

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

EMPLOYEE WELLNESS

- Explore <u>Your Plan for Health</u> (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 <u>medical plan premium credit</u> and <u>Health</u> <u>Reimbursement Account (HRA) credits</u>.
- You earn these rewards with healthy behaviors, such as completing a health assessment with biometrics, tracking physical activity and participating in wellness programs.

HR CONNECTION

Portal: <u>https://hrconnection.osu.edu</u> (614) 247-myHR (6947) <u>HRConnection@osu.edu</u>

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



Jennifer Klipfer

HR Business Partner (HRPB) 614-247-1966 <u>Klipfer.2@osu.edu</u>

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.

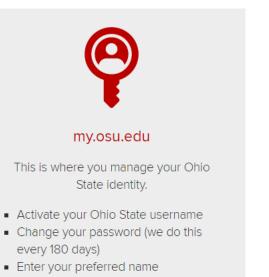
These individuals are another resource for HR support in addition to <u>HR</u> <u>Connection</u>, Ohio State's shared service operation.

- View <u>BuckeyeLearn</u> transcript
- Review <u>B&F required training</u>
- Access <u>B&F Performance Manager tool</u>



IT Resources

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





BuckeyePass

Many Ohio State systems use BuckeyePass powered by Duo as an extra layer of security. It is quick and easy to setup/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

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

BOOKMARK COMMON LINKS

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



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