**Workday**

**Workday** is the university's system used to gain authorization to travel, request travel reimbursements and procure goods and services. Log in using your OSU name.# email and password.

Spending university funds requires a documented business purpose that outlines why the expense is necessary and how it benefits the university. Document on the request that your budget manager has verbally approved the expense. The business purpose and estimated costs should be approved online in Workday by an authorized approver prior to any university funds being spent.

**Resources:** OSU Marion [Workday webpage](#) & library of job aids

**Procurement**

Goods and services can be procured through **Workday** on a **requisition**.

Submit a **BuckeyeBuy** request to purchase from the university catalog.

If goods and services are not available through the BuckeyeBuy catalog, submit a **non-catalog** requisition and provide a compelling reason as to why the BuckeyeBuy vendor does not fit the procurement needs. You will be notified if your non-catalog request can be procured on a university Pcard otherwise a purchase order will be issued.

**Travel**

All university travel requires a pre-approved **spend authorization (SA)** in Workday before university or personal funds are spent and before any travel takes place. If personal funds are spent on university travel prior to approval, reimbursement is not guaranteed.

Airfare must be procured through the university's contracted agency (either through **full service agent** or their online booking tool - **Concur**) with an approved SA#. Rental cars must be reserved through Enterprise, National or Hertz through the **applicable reservation solution**.

**Travel Reimbursements**

Travel reimbursements are submitted via an **expense report** in Workday within 60 days of the expense being paid/incurred and direct deposited into the same account as your paycheck.

Expenses not fully submitted and approved within 60 days of the date the expense was paid or incurred will be subject to taxation for which the traveler will be responsible, per IRS taxation requirements.

**Required Training for All Faculty & Staff**

Access your training transcript through **BuckeyeLearn**

<table>
<thead>
<tr>
<th>Training Title</th>
<th>Frequency</th>
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</thead>
<tbody>
<tr>
<td>Institutional Data Policy</td>
<td>Annual</td>
</tr>
<tr>
<td>Financial Stewardship for All</td>
<td>When a new version is published</td>
</tr>
</tbody>
</table>

**Need help?**

[Create a Requisition Job Aid](#)

**Contact:** Pam Patterson
740-725-6311
marionbog@osu.edu

**Travel FAQs**

**Spend Authorization Job Aid**

**Expense Report Job Aid**

**Before You Depart**

**When You Return**

**Contact:** Pam Patterson
740-725-6311
marionbog@osu.edu

⚠️ **BEFORE YOU BOOK** ⚠️

- Don’t buy your own airline ticket
- You won’t be reimbursed – Use [CTP](#) or [Concur](#)
- Airbnb not recommended at this time due to COVID
- Lodging must be refundable due to cancellation
- Don’t accept insurance option for rental cars as it duplicates costs covered under OSU’s contract with the Enterprise, National & Hertz. You will not be reimbursed for insurance.
- Exception: international travel which requires local or regional insurance.
Equipment Management
Computers and equipment are tracked by Marion’s Office of Information Technology. Contact: Bryan Sickmiller | 740-725-6245 | sickmiller.2@osu.edu

All other equipment is tracked and managed by Workday. Contact: Pam Patterson | 740-725-6311 | patterson.318@osu.edu

Supplies and Mail
A centrally ordered stock of basic office supplies is available in the following locations:
- Maynard Hall | Mail Room | Room 126
- Morrill Hall | Faculty Services Office | Room 150
- Science and Engineering Building | Mail Room | Room 110Q

Outgoing business mail is couriered from Marion to the Columbus campus weekly on Wednesday. Envelopes are available in the rooms listed above and faculty mailings can be coordinated through Autumn Lovejoy | 740-725-6264 | lovejoy.53@osu.edu

Faculty Funds Reporting
The Office of Finance and Business Services tracks all faculty allocations including start-up funds, professional development funds, grant funds and special allocations. Reports will be sent monthly by Erin Timmins.

Contact: Erin Timmins | 740-725-6064 | timmins.18@osu.edu

Other Services
- Bursar Activity: process tuition and fee payments as well as remove late fees and holds from student accounts.
- Budgeting, trend reporting, fee setting, financial modeling and forecasting.
- Approve and reconcile of revenue, expenses, non-cash assets, payroll and scholarships.
- Management of cost-share agreement with Marion Technical College, internal controls, financial conflict of interests and annual process (eCOI), and financial services.

Fraud Prevention and Reporting: If you become aware of a violation of state or federal statutes, rules, or regulations or the misuse of public resources, you may report the violation or misuse with your supervisor, Senior Fiscal Officer, or with the university’s anonymous line. Learn More at the Office of Finance and Business Services Webpage

Office of Finance and Business Services

<table>
<thead>
<tr>
<th>Betsy Lindsey</th>
<th>Director and Senior Fiscal Officer</th>
<th>Budget, Modeling, Financial Stewardship &amp; Strategic Initiatives</th>
<th>740-725-6354</th>
<th><a href="mailto:lindsey.3@osu.edu">lindsey.3@osu.edu</a></th>
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<tbody>
<tr>
<td>Kori Montgomery</td>
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<td>Pam Patterson</td>
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<td>Purchasing, Travel, and Equipment Inventory</td>
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<tr>
<td>Erin Timmins</td>
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<td>740-725-6064</td>
<td><a href="mailto:timmins.18@osu.edu">timmins.18@osu.edu</a></td>
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