BCI Background Check Reimbursement

A separate request must be done for each reimbursement, there will no longer be a spreadsheet.

Before entering in Workday, collect from the volunteer:

1. Payment receipt with the individual's name.
   a. This file should include:
      i. OSU Criminal History and Background Check Reimbursement Form.
      ii. Handwritten or printed payment receipt from the institution completing the background check (i.e., local sheriff's office).
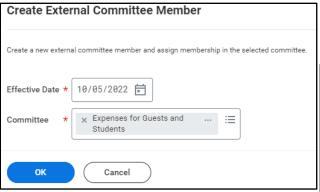2. Confirm the **payment address, phone number, and email address** with the payee for remittance.

WORKDAY – *Find or Create ECM first before submitting Expense Report.*

1st Search "Find External Committee Members for Expense"

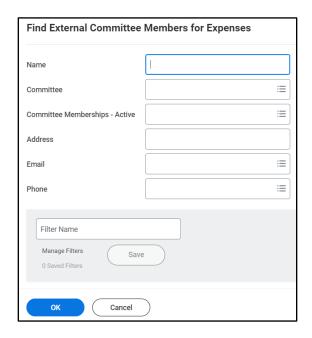1. Check Workday if the non-employee is already in the system before creating a new ECM.
   a. Enter the non-employee's name in the ***NAME*** field.
   b. Less is more when searching.
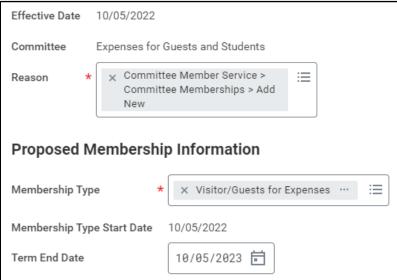   c. ***IF*** not in the system, continue to Create ECM.

Create External Committee Member"

1. Add the **Date**
2. Type 'Exp', hit enter. Select **Expense for Guest and Student**

3. ***** Reason: Select **Committee Member Service > Committee Memberships > Add New**
4. ***** Membership Type: **Visitor/Guests for Expenses**
5. Term End Date: Select **1 year from effective date.**

6. **TABS**
   a. Legal Name Information
      i. **First/Last Name**
   b. Contact Information
      i. *** Phone/Device/Type**
      ii. *** Address/City/State/Postal Code/Type**
      iii. *** Email Address/Type** *(if email not available use fake@gmail.com)*
7. **SUBMIT**

* No wait time once submitted the name will be automatically approved/available for the next step of reimbursement.
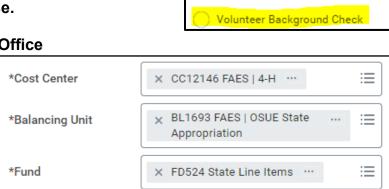
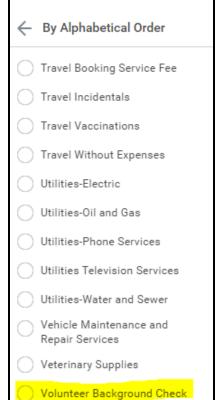**2nd Search** "Create Expense Report for Non-Worker"
Create Expense Report for Non-Worker

1. ***** Payee Type: **External Committee Member**
2. ***** Pay To: Search for **ECM Name**
3. Memo: **Extension Background Check Reimbursement**
4. ***** Business Purpose: **Non- Travel**
5. *** WORKTAGS**
   a. *Cost Center:* **CC12146 FAES | 4-H**
   b. *Balancing Unit:* **<u>CHANGE TO</u> BL1693 FAES | OSUE State Appropriation**
   c. *Fund:* **FD524 State Line Items**
6. Click **OK**
7. **Expense Lines > ADD**
8. ***** Expense Item: ***Volunteer Background Check***
9. ***** Quantity: 1
10. ***** Per Unit Amount: **Amount of BCI receipt**
11. Memo*:* **Extension Background Check Reimbursement**
12. ***** Business Reason: **Reimbursement of cost to process background check required of all Ohio 4-H Volunteers due to working with minors. State of Ohio requires OSUE 4-H to reimburse volunteers for this expense.**
13. ***** Merchant: **Name of merchant**
    a. i.e., Franklin County Sheriff's Office
14. **Attach PDF receipt**
15. **SUBMIT**

Notes:

➢ **[ECM - Find|Create|Change an External Committee Member | Administrative Resource Center (osu.edu)](#)**