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## UWO Foundation Exp to Complete form

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**From** Mai Kar Lee <leemai@uwosh.edu>

**Date** Tue 1/28/2025 12:13 PM

**To** Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>

**Cc** Michelle Highley <highley@uwosh.edu>

 1 attachment (106 KB)

Foundation\_Expenses\_To Complete.docx;

Hello Jane,  
Sorry for the delay. Attached is UWO's form. Thank you.

Mai Lee  
Interim Controller  
University of Wisconsin Oshkosh  
236 Dempsey | 800 Algoma Blvd  
Oshkosh Wisconsin 54901


Email: leemai@uwosh.edu

University of Wisconsin Oshkosh Foundation (each campus and Foundation will have it's own page)

Confirm Foundation/Customer Account information is complete and accurate in Workday

Physical address is not correct- emailed Kirk already

Find Customers report, Select "Primary Foundation" and click the magnifying glass next to your Foundation name, Click on Addresses and Contacts, Customer Contacts.

University of Wisconsin-Superior Foundation, Inc.  Customer

Customer IDUWSUP\_CUS\_99998

AddressPO Box 2000  
Superior, WI 54880  
United States of America

Approval StatusApproved

Overview

Addresses and Contacts

Contracts

Invoices and Payments

Financial Snapshot

Assigned Roles

Custom Reports

Process History

Contact Information

Customer Contacts


Connection Map

Document Delivery

Add

Set Up Bill-To Contacts

1 item

Contact	Primary Bill-To Contact	Bill-To Contact	Default Bill-To Contact	Phone Number	Email Address	Email Documents
Jeanne Thompson	Yes	Yes	Yes		 jthomp51@uwsuper.edu	Customer Invoice

If this is not accurate please email Kirk Anderson [kdanderson3@wisc.edu](mailto:kdanderson3@wisc.edu) with any changes.

Provide an example of Foundation Account Numbers and Foundation Name (Naming Convention) to be on the website so employees can complete in their Expense Report

Fund Name: Administrative Fund

Fund Number: 5050

### Item Details

Attendee(s)	*	<div><div>X Graig Brooks ...</div><div>X Jane Rolfsmeyer ...</div><div>X Michael Jordan (Bulls) ...</div><div>X Mickey Mouse (Disney) ...</div></div>
Number of Persons	*	<input type="text" value="4"/>
Account Number	*	<input type="text" value="987654321"/>
Business Reason	*	<input type="text" value="Meal overage for recruiting dinner"/>
Merchant		<input type="text" value="Harvey House"/>
Foundation Account Name		<input type="text" value="Professor Rolfsmeyer's Foundation Accou"/>

List of names/email addresses/phone numbers of who to contact with any Foundation account questions. (likely the Expense Foundation Specialist at a minimum)

Jennifer Klinger  
[Klingerj@uwosh.edu](mailto:Klingerj@uwosh.edu)  
920-424-3457

Any additional policies or information you would like to have on this page for go live or any links to existing pages

Please send completed information to Jane Rolfsmeyer at Jane Rolfsmeyer [jrolfsmeyer@wisc.edu](mailto:jrolfsmeyer@wisc.edu) by December 20<sup>th</sup>.