

UWO Foundation Exp to Complete form

From Mai Kar Lee <leemai@uwosh.edu>

Date Tue 1/28/2025 12:13 PM

To Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>

Cc Michelle Highley <highleym@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

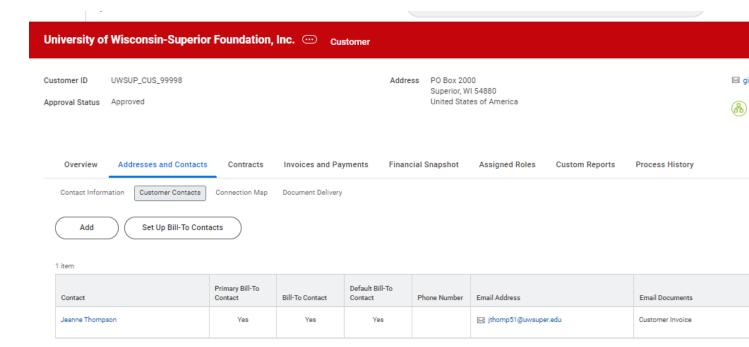
Email: leemai@uwosh.edu

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.

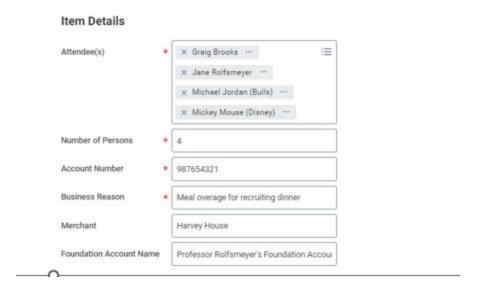


If this is not accurate please email Kirk Anderson kdanderson3@wisc.edu with any changes.

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



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

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 <u>irolfsmeyer@wisc.edu</u> by December 20th.