

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

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

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 ID: UWSUP\_CUS\_99998 Address: PO Box 2000 Superior, WI 54880 United States of America give2uws@uwsuper.edu

Approval Status: Approved Navigate Customer Hierarchy

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	Comments	
Jeanne Thompson	Yes	Yes	Yes		jthomp51@uwsuper.edu	Customer Invoice		Edit Remove

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

### Foundation Account Number

Use one of the following options for this field:

#### 5140-University Program Activities

Expenses related to carrying out university programs such as: performances/concerts, outreach, academic activities, etc.

#### 5330-Donor Recognition

Items and activities to thank donors: recognition events, meals, gifts, plaques, mailings, etc.

#### 5350-Board Meeting Expense

Materials and refreshments for board meetings (Foundation, advisory board, etc.)

#### 5360-Donor Cultivation

Expenses for one on one fundraising: travel, meals, etc.

#### 5370-Special Event Expense

Expenses for events with fundraising as the primary purpose. For donor recognition events, use 5330 Donor Recognition.

## Foundation Account Name

In this field, describe the Foundation fund your expense should be applied to (ie, "Geography Fund," "College of Arts & Humanities General Fund," etc.). This will be reviewed by the Foundation for alignment with the fund purpose and donor restrictions.

**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 )

Hannah Wallisch [wallisch@uwp.edu](mailto:wallisch@uwp.edu) 262-595-2233

Kim Duesing. [duesing@uwp.edu](mailto:duesing@uwp.edu) 262-595-2939

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

None

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