

Name of Campus and Foundation (each campus and Foundation will have it's own page)

University of Wisconsin Green Bay Foundation

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.

The screenshot shows the Workday interface for a customer profile. The header is red with the text "University of Wisconsin-Superior Foundation, Inc. Customer". Below the header, there is a section for customer information including Customer ID (UWSUP_CUS_99998), Address (PO Box 2000, Superior, WI 54880, United States of America), and Approval Status (Approved). A navigation bar includes tabs for Overview, Addresses and Contacts (selected), Contracts, Invoices and Payments, Financial Snapshot, Assigned Roles, Custom Reports, and Process History. Under the "Addresses and Contacts" tab, there are sub-tabs for Contact Information, Customer Contacts (selected), Connection Map, and Document Delivery. A table lists customer contacts with columns for Contact, Primary Bill-To Contact, Bill-To Contact, Default Bill-To Contact, Phone Number, Email Address, Email Documents, and Comments. One contact is listed: Jeanne Thompson, with Primary Bill-To Contact, Bill-To Contact, and Default Bill-To Contact all set to "Yes". The email address is jthomp51@uwsuper.edu. There are "Add" and "Set Up Bill-To Contacts" buttons above the table. At the bottom of the table, there are "Edit" and "Remove" buttons for the listed contact.

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	

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

Correct for UW-Green Bay

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

See attached excel file

The screenshot shows the "Item Details" form in Workday. It includes fields for Attendee(s), Number of Persons, Account Number, Business Reason, Merchant, and Foundation Account Name. The Attendee(s) field is populated with a list of names: Graig Brooks, Jane Rolfmeyer, Michael Jordan (Bulls), and Mickey Mouse (Disney). The Number of Persons field is set to 4. The Account Number field is set to 987654321. The Business Reason field is set to Meal overage for recruiting dinner. The Merchant field is set to Harvey House. The Foundation Account Name field is set to Professor Rolfmeyer's Foundation Account.

Attendee(s)	Number of Persons	Account Number	Business Reason	Merchant	Foundation Account Name
Graig Brooks Jane Rolfmeyer Michael Jordan (Bulls) Mickey Mouse (Disney)	4	987654321	Meal overage for recruiting dinner	Harvey House	Professor Rolfmeyer's Foundation Account

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

Contact Information: Nora Langolf, langolfn@uwgb.edu

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

None at this time.

Please send completed information to Jane Rolfsmeyer at Jane Rolfsmeyer jrolfsmeyer@wisc.edu by December 20th.

ACTIVE_Funds

Fund ID	Fund Description
10000	Weidner Center for the Performing Arts Endowment
10060	Lifelong Learning Institute Program
10110	Cofrin Center for Biodiversity
10120	Toft Point Operating Fund
10140	College of Health, Education, and Social Welfare Fund
10170	UWGB LeMieux Chapel Fund
10180	Cofrin Center for Biodiversity Research
10220	Phuture Phoenix Program
10230	Vice Chancellor's Fund-Business & Finance
10250	Robert L. Ganyard Library Endowment
10260	Retirees Association
10270	Austin E. Cofrin School of Business Endowment
10280	Environmental Management & Business Institute
10310	David A. Cofrin Library Improvement Fund
10330	Lower Fox River Watershed Monitoring Program Operating Fund
10350	Cofrin School of Business Experiential Learning Fund
10360	Theatre First Nighters
10380	Cofrin Arboretum - Unrestricted
10400	Shorewood Development
10610	Advancement Operations
10720	UW-Green Bay Fund for Excellence
10770	Weidner Center Annual Fund
10800	Women's Basketball Phoenix Fast Break Club Booster Fund
10890	Phoenix Fund - Women's Soccer Fund
10900	Phoenix Fund - Women's Softball Fund
10930	Phoenix Fund - Women's Volleyball Fund
10940	Phoenix Fund
10950	Provost's Discretionary Fund
10960	International Education Discretionary Fund
10970	Dean of Enrollment Services Discretionary Fund
10980	Curator Discretionary Fund
10990	Information Services Discretionary Fund
11000	College of Arts, Humanities, and Social Sciences Fund
11010	CAHSS Impact Fund
11020	Dean of Students Discretionary Fund
11030	Outreach and Adult Education Discretionary Fund

ACTIVE_Funds

11040	Camp Lloyd Fund
11060	Study Abroad - Costa Rica Discretionary Fund
11080	Multicultural Resource Center Fund
11090	Campus Life Discretionary Fund
11110	Cofrin Center for Biodiversity - Panama Travel Course
11120	Phoenix Fund - Men's Basketball Fund
11130	Phoenix Fund - Women's Basketball Fund
11160	Fourth Estate
11170	Weidner Center Stage Door Education Series
11200	Weidner Center Strategic Plan
11280	Phuture Phoenix Green Bay Packers Fund
11290	Education Center for First Nation Studies
11300	Cheer Team Fund
11310	Phoenix Fund - Men's Soccer
11410	Veterans Center
11420	Weidner Center Lighting Projects
11450	UWGB Outreach Summer Camps Fund
11490	Professional Program in Education Vision Fund
11500	Professional Programs in Social Work Vision Fund
11540	Men's Basketball Excellence Endowment
11550	Outdoor Facilities - General
11580	Pride Center (LGBTQ) Operations and Student Support Fund
11590	Dance Team Fund
11630	Music Performance Program - 6:30 Thursdays: Music from Every Angle
11660	Natural and Applied Science - Geoscience Fund
11680	Child Care Services
11720	Friends of Music
11730	Alumni Relations & Events
11770	Jazz Fest
11810	Weidner Center rental fees for Green Bay schools
11820	Engineering Technology Program
11830	Campus Cupboard
11870	Phoenix Fund - SAAC/S-A Excellence Fund
11890	College of Science, Engineering and Technology Fund
11900	UWGB Viking House
11940	Green Bay Packers Foundation 8th Grade Tour Day
11950	Women's Basketball Excellence Fund

ACTIVE_Funds

11990	Human Biology Program Fund
12020	Phoenix Innovation Park - Engineering Fund
12030	Archives and Area Research Center
12040	GenCyber Cybersecurity Camp
12110	Music - Percussion Fund
12130	Phoenix Fund - Men's and Women's Cross Country
12150	Phoenix Fund - Men's and Women's Golf
12160	Phoenix Fund - Men's and Women's Swim/Dive
12170	Phoenix Fund - Men's and Women's Nordic Ski
12200	Camp Lloyd Kids Project Fund
12210	Toft Point Student Research
12230	Richard J. Resch School of Engineering Endowment Fund
12280	Lifelong Learning Institute Scholarship Fund
12290	Phoenix Innovation Park - Einstein Project
12350	Psych Week
12360	The Teaching Press
12370	UW-Green Bay, Marinette Campus Theatre Programs
12380	Education and Community Engagement Fund
12450	Nursing Campaign Fund
12480	Weidner Center Show Sponsorships
12490	Dental City Competitive Spark Operating Fund
12510	NERR General Fund
12530	Pride Center - LGBTQ+ Summer Camps
13000	Mental Health & Wellness - Student Support
13100	Social Justice Initiatives
13200	Need-based Grant & Aid Fund
13300	Willie Davis Investment & Trading Lab
13500	Electrical Engineering Operations Fund
13600	Center for Entrepreneurship Operating Fund
13700	Institute of Music Instrument & Equipment Fund
13800	Richard J. Resch Audio Production Studio
13900	Weidner Philharmonic Operating Fund
14000	Charles Schwab Foundation Center for Financial Wellness
14100	Rising Phoenix Early College High School Program
14200	Ignite the Future - Athletics
14400	Resch Institute of Music Operating Fund
14900	Sheepshead Review Operating Fund

ACTIVE_Funds

15200	Nonprofit Education & Development Fund
15300	Youth Leadership Camp Fund
15500	Bradley Foundation Speaker Series
41270	Phuture Phoenix Philanthropists
41280	Chancellors Discretionary Fund
44070	Women's Leadership Institute Endowment Fund
44200	FOTP Operating Endowment
44250	Czech-Slovak Voice Competition Endowment
44340	Volunteer Income Tax Assistance (VITA)
50000	UW-Green Bay Sheboygan Endowment Fund
55000	UW-Green Bay Manitowoc Endowment Fund
55180	Kay Levin Fund for Professional Development
60210	Roger & Lyn Derusha Family AODE Fund
60220	Gehrke Family Fund for Theatre on the Bay
60230	Hood Visiting Chair Fund
60250	UWGB Marinette Unrestricted Fund
60260	Morris G and Grace R Mundt Int'l Initiative Fund
60360	Marinette Theatre on the Bay Endowment