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**FW: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports - follow up**

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**From** Allie Watters <allie.watters@wisc.edu>

**Date** Fri 12/13/2024 12:46 PM

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

**Cc** Graig Brooks <grraig.brooks@wisc.edu>; ELIZABETH R DRESSEL <erdressel@wisc.edu>; April Cook <april.cook@wisc.edu>; Meghann GROVE <meghann.grove@wisc.edu>; Allie Watters <allie.watters@wisc.edu>

 1 attachment (161 KB)

April-Foundation\_Expenses\_To Complete.docx;

Jane,  
Please see attached for requested Foundation information due Dec 20. Let us know if you have any questions.

All best,  
Allie

**Allie Watters** *she/her*

Expense Reimbursement Program Manager

Division of Business Services

University of Wisconsin-Madison

[Allie.Watters@wisc.edu](mailto:Allie.Watters@wisc.edu)

 [Message me on Teams](#)

Phone: 608/263-3525

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**FAN  
Mail**

**We celebrate excellence.**

All members of the campus community are welcome to recognize or thank any Business Services staff member or team using the FAN Mail Program [here](#).

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**From:** Allie Watters

**Sent:** Friday, December 13, 2024 11:40 AM

**To:** April Cook <april.cook@wisc.edu>

**Cc:** Meghann GROVE <meghann.grove@wisc.edu>; Tricia Johnson <tricia.johnson@wisc.edu>

**Subject:** RE: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports - follow up

Thanks April – I added myself as a contact, and we don't have our procedure pages ready yet, so I added a note. I'll return to Jane/Graig/Liz, and cc you.

In terms of legal name/DBA – whatever you all think is best. Let me know if you need anything else from me at this time. I'm starting to test more heavily here, but there have been some fun odd things with WI6 since the refresh we've been trying to work out/work through...

All best,  
Allie

**Allie Watters** *she/her*

Expense Reimbursement Program Manager

Division of Business Services

University of Wisconsin-Madison

[Allie.Watters@wisc.edu](mailto:Allie.Watters@wisc.edu)

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**From:** April Cook <[april.cook@wisc.edu](mailto:april.cook@wisc.edu)>

**Sent:** Thursday, December 12, 2024 8:26 AM

**To:** Allie Watters <[allie.watters@wisc.edu](mailto:allie.watters@wisc.edu)>

**Cc:** Meghann GROVE <[meghann.grove@wisc.edu](mailto:meghann.grove@wisc.edu)>; Tricia Johnson <[tricia.johnson@wisc.edu](mailto:tricia.johnson@wisc.edu)>

**Subject:** FW: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports - follow up

Hi Allie, looks like we'll need to connect on this before turning back in; not sure who you want to list as UWMSN contacts for the second to last item. I'm fine with you finishing and providing back if you'd like.

Tricia, I'd like to sit down with you sometime and work on cleaning up the name, address, email, contacts, etc for the customer record. There are folks listed in there that don't work at UWF anymore.

Also, I think we all need to come to a consensus on what name we want to show in WD, the legal name or the dba name. My vote is always the legal name, but I'm also flexible.

Thanks much  
April

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**From:** LEA ERICKSON <[lea.erickson@wisc.edu](mailto:lea.erickson@wisc.edu)>

**Sent:** Wednesday, December 4, 2024 11:07 AM

**To:** Grace Kilpatrick <[grace.kilpatrick@wisc.edu](mailto:grace.kilpatrick@wisc.edu)>; DAVID HONMA <[david.honma@wisc.edu](mailto:david.honma@wisc.edu)>; Meghann GROVE <[meghann.grove@wisc.edu](mailto:meghann.grove@wisc.edu)>; April Cook <[april.cook@wisc.edu](mailto:april.cook@wisc.edu)>

**Cc:** Sabrina Messer <[sabrina.messer@wisc.edu](mailto:sabrina.messer@wisc.edu)>; Kurt McMillen <[kurt.mcmillen@wisc.edu](mailto:kurt.mcmillen@wisc.edu)>

**Subject:** RE: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports - follow up

<b>Campus</b>	<b>Campus PM Name</b>	<b>Campus PM Email</b>
<b>Eau Claire Stevens Point</b>	Jennifer Joten	<a href="mailto:jennifer.joten@wisc.edu">jennifer.joten@wisc.edu</a>
<b>Green Bay Stout</b>	Victor Alatorre	<a href="mailto:victor.alatorre@wisc.edu">victor.alatorre@wisc.edu</a>
<b>La Crosse Parkside</b>	Charles Williams	<a href="mailto:charles.williams2@wisc.edu">charles.williams2@wisc.edu</a>
<b>Platteville  Whitewater</b>	Tim Dalby (Platteville)  Anne Walaszek (Whitewater)	<a href="mailto:tim.dalby@wisc.edu">tim.dalby@wisc.edu</a>  <a href="mailto:anne.walaszek@wisc.edu">anne.walaszek@wisc.edu</a>
<b>River Falls Oshkosh</b>	Mark Kravchuk	<a href="mailto:mark.kravchuk@wisc.edu">mark.kravchuk@wisc.edu</a>
<b>Milwaukee</b>	Rebecca Steely	<a href="mailto:rebecca.steely@wisc.edu">rebecca.steely@wisc.edu</a>
<b>Superior</b>	Cassie Kasler (Superior)	<a href="mailto:cassie.kasler@wisc.edu">cassie.kasler@wisc.edu</a>
<b>UWSA</b>	Ronald Schwartz (UWSA)	<a href="mailto:ronald.schwartz@wisconsin.edu">ronald.schwartz@wisconsin.edu</a>
<b>Madison</b>	ATP Readiness Help	<a href="mailto:atpreadinesshelp@office365.wisc.edu">atpreadinesshelp@office365.wisc.edu</a>

Thank you for your engagement!



**Jane Rolfsmeyer, Business Systems Analyst - Expenses**

Administrative Transformation Program

University of Wisconsin

[jrolfsmeyer@wisc.edu](mailto:jrolfsmeyer@wisc.edu)

[atp.wisconsin.edu](http://atp.wisconsin.edu)

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

University of Wisconsin Foundation (our foundation has a d/b/a of Wisconsin Foundation and Alumni Association. Legal name is UW Foundation)

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<b>Form 990</b> <small>Department of the Treasury Internal Revenue Service</small>	<b>Return of Organization Exempt From Income Tax</b> <small>Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public. Go to <a href="http://www.irs.gov/Form990">www.irs.gov/Form990</a> for instructions and the latest information.</small>	<small>OMB No. 1545-0047</small> <b>2022</b> <b>Open to Public Inspection</b>
<b>A</b> For the <b>2022</b> calendar year, or tax year beginning <b>JUL 1, 2022</b> and ending <b>JUN 30, 2023</b>		
<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return	<b>C</b> Name of organization  <b>UNIVERSITY OF WISCONSIN FOUNDATION</b> Doing business as <b>WISCONSIN FOUNDATION AND ALUMNI</b> <small>Number and street (or P.O. box if mail is not delivered to street address) Room/suite</small>	<b>D</b> Employer identification number  <b>39-0743975</b> <b>E</b> Telephone number

**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  
Approval Status: Approved

Address: PO Box 2000  
Superior, WI 54880  
United States of America

give2uws@uwsuper.edu  
[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		<a href="mailto:jthomp51@uwsuper.edu">jthomp51@uwsuper.edu</a>	Customer Invoice		<div>Edit Remove</div>

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

Address is not visible in WI6. Will work on customer contact clean up with AR team.

**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

(Account) Fund number: 132340255

(Account) Fund name: 3M Fund for College of Engineering

### 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 )

Allie Watters, Expense Reimbursement Program Manager

[Allie.watters@wisc.edu](mailto:Allie.watters@wisc.edu)

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

These pages are not ready at this time. We will provide links when they are updated for Workday.

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