

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

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

Date Fri 12/13/2024 12:46 PM

To Jane Rolfsmeyer < jrolfsmeyer@wisc.edu>

Cc Graig Brooks <graig.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

Message me on Teams

Phone: 608/263-3525

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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.

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

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From: April Cook april.cook@wisc.edu> Sent: Thursday, December 12, 2024 8:26 AM To: Allie Watters <allie.watters@wisc.edu>

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

From: LEA ERICKSON <lea.erickson@wisc.edu> Sent: Wednesday, December 4, 2024 11:07 AM

To: Grace Kilpatrick <grace.kilpatrick@wisc.edu>; DAVID HONMA <david.honma@wisc.edu>; Meghann GROVE

<meghann.grove@wisc.edu>; April Cook <april.cook@wisc.edu>

Cc: Sabrina Messer <sabrina.messer@wisc.edu>; Kurt McMillen <kurt.mcmillen@wisc.edu> Subject: RE: UXT Extra Session: Expenses - Foundation Expenses on Expense Reports - follow up

cassie.kasler@wisc.edu

ronald.schwartz@wisconsin.edu

atpreadinesshelp@office365.wisc.edu

Campus **Campus PM Name Campus PM Email Eau Claire** Jennifer Joten jennifer.joten@wisc.edu **Stevens Point Green Bay** Victor Alatorre victor.alatorre@wisc.edu Stout La Crosse **Charles Williams** charles.williams2@wisc.edu **Parkside Platteville** Tim Dalby (Platteville) tim.dalby@wisc.edu Anne Walaszek anne.walaszek@wisc.edu (Whitewater) Whitewater **River Falls** Mark Kravchuk mark.kravchuk@wisc.edu Oshkosh Milwaukee Rebecca Steely rebecca.steely@wisc.edu

Cassie Kasler (Superior)

Ronald Schwartz (UWSA)

ATP Readiness Help

Thank you for your engagement!

Superior

UWSA

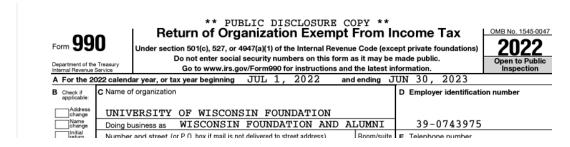
Madison



Jane Rolfsmeyer, Business Systems Analyst - Expenses

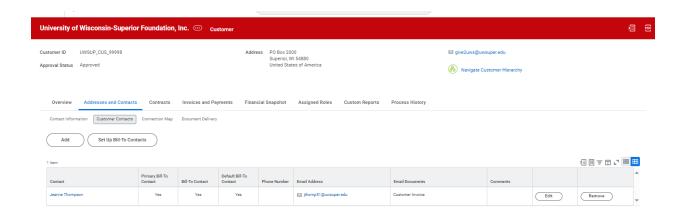
Name of Campus and Foundation (each campus and Foundation will have it's own page)

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



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.



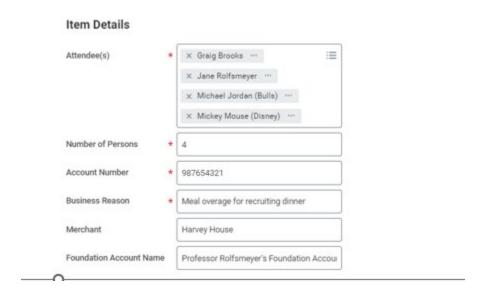
If this is not accurate please email Kirk Anderson kdanderson3@wisc.edu with any changes.

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



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

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