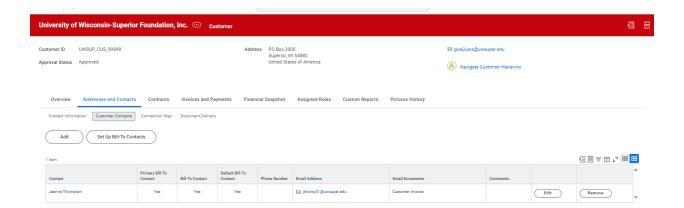<u>University of Wisconsin-Parkside Foundation</u> (each campus and Foundation will have it's own page)

<mark>Confirm Foundation/Customer Account information is complete and accurate in Workday</mark>

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.

<mark>Provide an example of Foundation Account Numbers and Foundation Name (Naming Convention) to be on the website</mark> 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.)
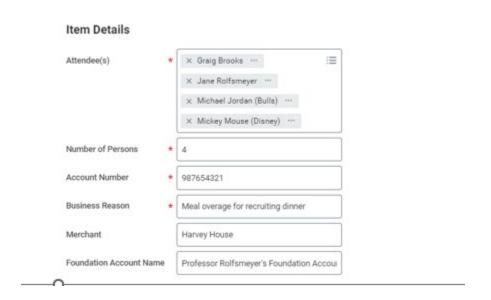
5360-Donor Cultivation
Expenses for one on one fundraising: travel, meals, etc.

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

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

Hannah Wallisch wallisch@uwp.edu 262-595-2233

Kim Duesing. duesing@uwp.edu 262-595-2939

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

None

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