

Re: Foundation Expense Homework

From Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>
Date Wed 12/11/2024 1:22 PM

To Briana Bechel <bri>driana.bechel@uwrf.edu>

Hi Briana,

Thank you for your response! Making updates later shouldn't be an issue, as the plan is to post the Foundation guidance on a webpage that can be updated as needed.

Happy Holidays! Jane



Jane Rolfsmeyer, Business Systems Analyst - Expenses Administrative Transformation Program University of Wisconsin jrolfsmeyer@wisc.edu atp.wisconsin.edu

From: Briana Bechel <bri>Sent: Wednesday, December 11, 2024 1:06 PM
To: Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>
Subject: Foundation Expense Homework

Good afternoon Jane.

Please see the attached. Our Foundation does have a guidelines PDF that I was considering for the additional information to this page, but at this time that guidance does not match what the procedure will be come Workday. Will it be possible to add the additional policy information at a later date?

Thank you,



Grant Accountant | Accounting Services
University of Wisconsin-River Falls
220 North Hall | 410 S. 3rd St. | River Falls, WI 54022
715-425-4653 | uwrf.edu



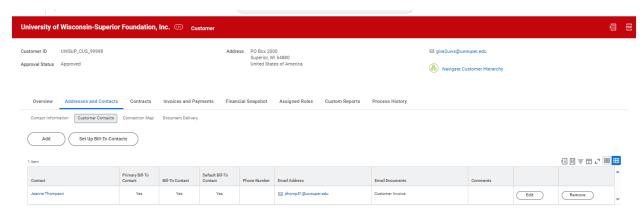
Name of Campus and Foundation (each campus and Foundation will have it's own page)

University of Wisconsin-River Falls and University of Wisconsin-River Falls Foundation, Inc.

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.

Address incorrect, business email incorrect, bill to correct. Emailed Kirk 12/11/2024.

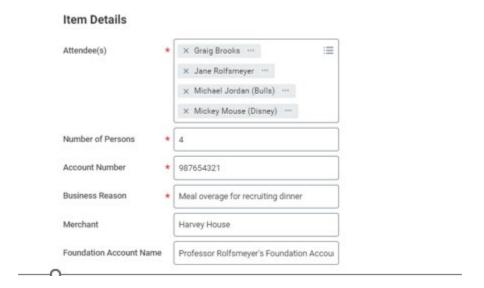


If this is not accurate please email Kirk Anderson kdanderson3@wisc.edu with any changes.

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 Numbers Example: 19794, 20657

Foundation Name Example: Stone Geology Fund, Agriculture Engineering Technology Fund



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

Foundation account questions to: Kristin O'Malley, <u>kristin.omalley@uwrf.edu</u>, 715-425-3575

Foundation Workday processing questions to: grantaccounting@uwrf.edu

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

Please send completed information to Jane Rolfsmeyer at Jane Rolfsmeyer <u>irolfsmeyer@wisc.edu</u> by December 20th.