



Outlook


Foundation Contact Updates

From Schulte-Shoberg, Kimberly <schulte-shobergk@uwstout.edu>

Date Thu 12/19/2024 3:58 PM

To Kirk Anderson <kdanderson3@wisc.edu>; Jane Rolfsmeyer <jrolfsmeyer@wisc.edu>

Cc Victor A Alatorre <victor.alatorre@wisc.edu>

 1 attachment (106 KB)

Foundation_Expenses_To Complete UWSTO.docx;

Hi Kirk and Jane,

Below is the updated information for the UW-Stout Foundation and attached are responses to your other items.

Kristie Leonard
715-232-2116
leonardkr@uwstout.edu

UW-Stout Foundation
320 South Broadway Street
Menomonie, WI 54751

Thanks---Kim



**University of
Wisconsin-Stout**
Wisconsin's Polytechnic University

StoutProud

KIMBERLY SCHULTE-SHOBERG

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

UW-Stout

UW-Stout 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.

University of Wisconsin-Superior Foundation, Inc. Customer

Customer ID: UWSUP_CUS_99998 Address: PO Box 2000 Superior, WI 54880 United States of America
Approval Status: Approved
Email: 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		jthomp51@uwsuper.edu	Customer Invoice		<div>Edit Remove</div>

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

It was not accurate so including changes in email repsonse.

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

Here are some examples of Foundation account numbers:

36969903 – Student Emergency Fund

37873002 – College of Science, Technology, Engineering, Math & Management

37270072 – Blue Devil Fund

Item Details

Attendee(s)	*	<div> X Graig Brooks ... </div> <div> X Jane Rolfsmeyer ... </div> <div> X Michael Jordan (Bulls) ... </div> <div> X Mickey Mouse (Disney) ... </div>
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

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

Kim Schulte-Shoberg schulte-shobergk@uwstout.edu

Heather Prissel prisselh@uwstout.edu

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

Please include the following comment:

“Stout employees will submit all Foundation Payment Requests via the Foundation Payment Request form. Do not submit via Workday.”

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