Financial Management Meeting

University of Wisconsin-Madison

April 13, 2021

Agenda

Welcome/Introduction	Dan Langer	5 minutes
UW-Madison Policy Library	Charles Meyer/Jenny Faust	20 minutes
Non-Sponsored Project Request Form	Kayla Strohl/April Cook	15 minutes
ATP – Finance Vision Workshop	Susie Maloney	20 minutes
ShopUW+	Lori Voss/Hartley Murray Dan Purcell/Liv Goff Mari Ann Menager	20 minutes

Financial Management Meeting

UW-Madison Policy Library
policy.wisc.edu

Policy Library Coordinator
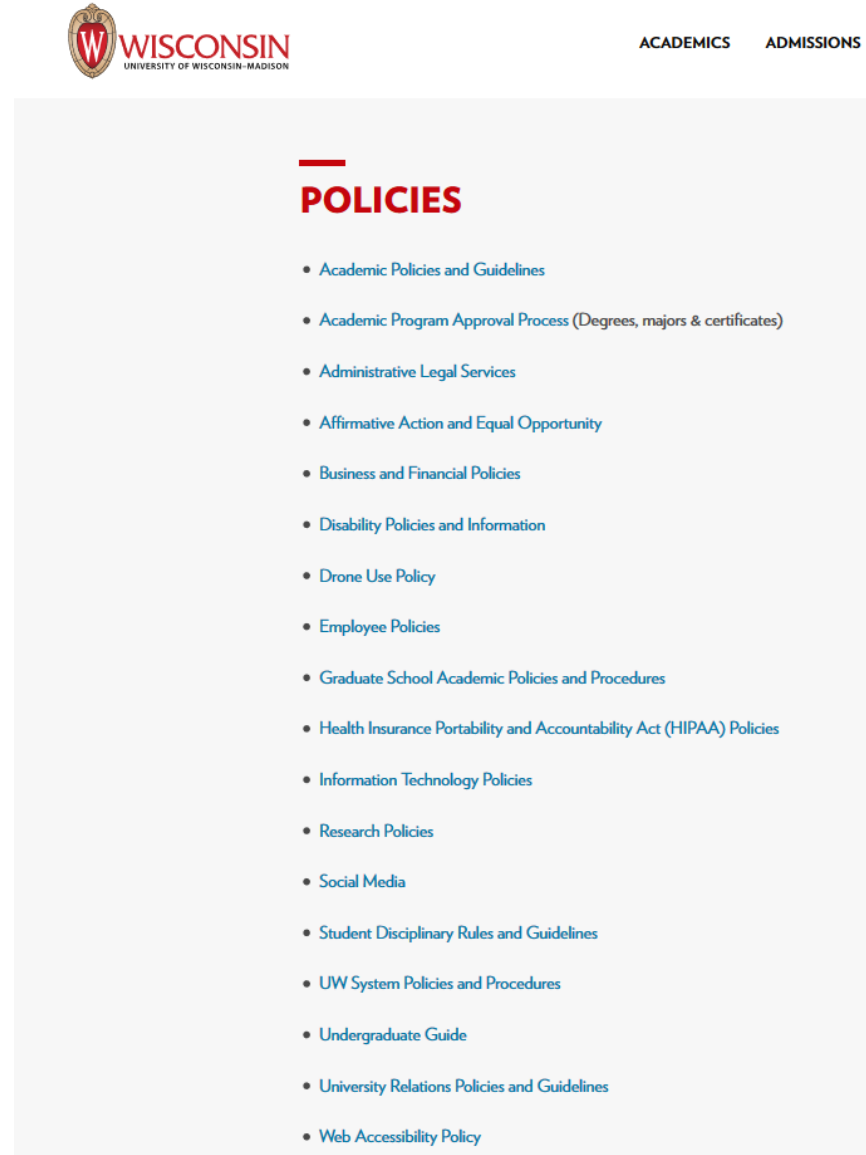policylibrarycoordinator@wisc.edu

04-13-2021

Project Structure and Governance
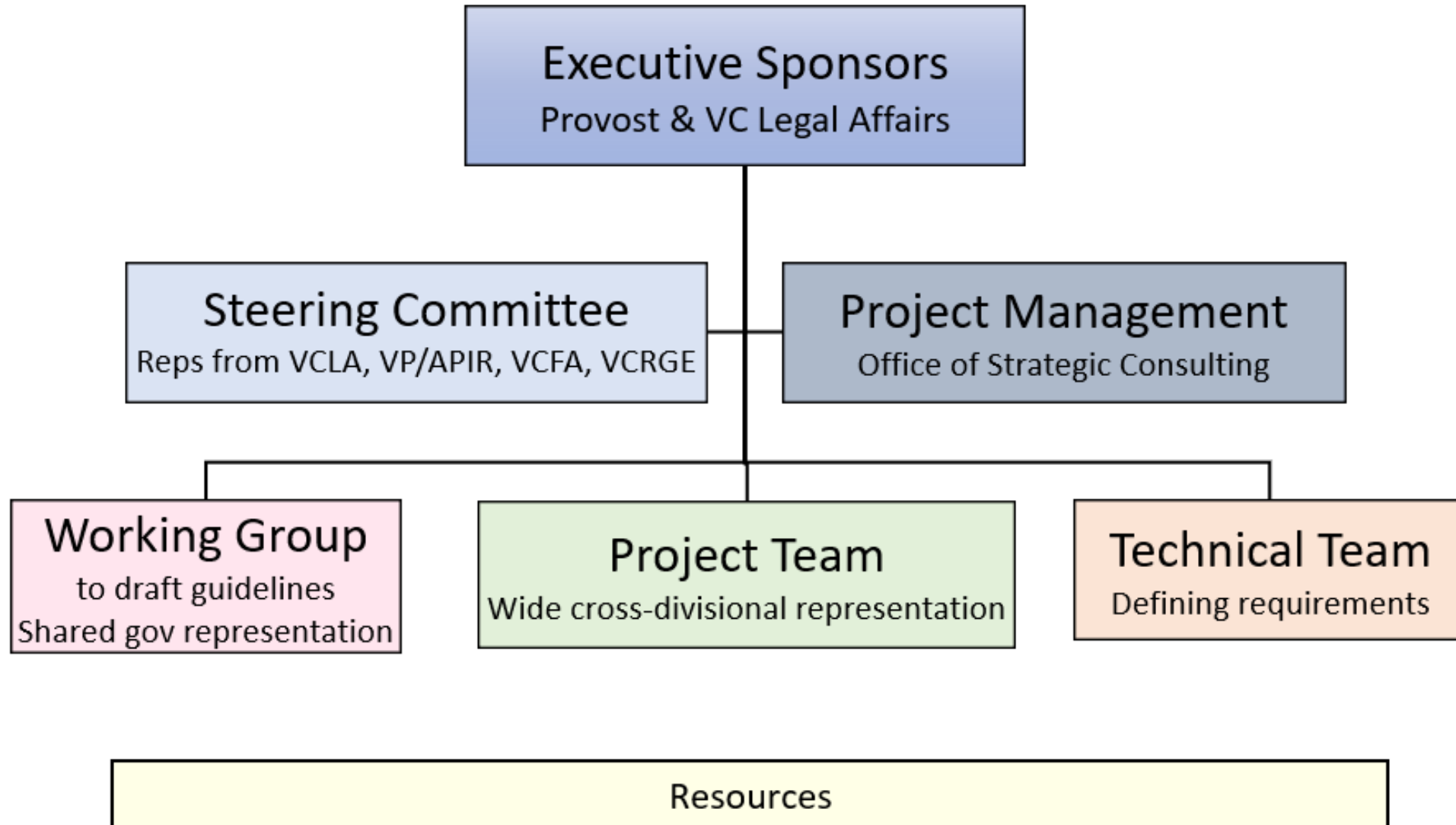
Key Success Factors

▶ Broad, cross-campus participation.

▶ Strong, centralized project management dedicated to facilitating the process, listening and moving forward is critical.

▶ Have a structured plan AND be flexible.

Current State at UW—Madison (2018)

▸Wisc.edu/policies

▸UW's policy front door.

▸Inconsistent collection of random links to:
- Sub-pages with more links.
- Departmental pages.
- Individual policies.

Office of Strategic Consulting

Project "Loose Ends"

▶ 2% (16 policies) remain to be validated and published.

▶ Budget situation delaying hiring policy library coordinator.

▶ Some unit web pages still need cleanup/language changes/redirects.

▶ Full stakeholder engagement ("roll out") still needs to occur.

Emerging Issues

▶ Increased awareness of policy content is driving policy change.

▶ Policy library highlighting policy issues.

▶ Need to reduce ambiguity about approval authority.

▶ "Judgment calls" about whether a change is substantive or editorial.

▶ In many cases, blurred lines between policy and procedure.

Office of Strategic Consulting

https://development.policy.wisc.edu/

UW–Madison Policy Life Cycle

The Policy Life Cycle illustrates the process for proposing new policy and for reviewing and modifying existing policy. The policy manager engages relevant stakeholder groups throughout this process. The *Guidelines for Policy Development at UW–Madison* provide further detail.

Start here when proposing new policy

1. **IDENTIFY NEED**
Need for a new policy could come from any source, external or internal.

2. **DRAFT AND EDIT**
Policy manager drafts or edits policy using the policy drafting template.

Stakeholder

Start here when reviewing and modifying existing policy

6. **PUBLISH**
Policy library coordinator publishes policy in the library and provides appropriate link to responsible office for communication.

3. **REVIEW/REVISE**
Policy manager solicits appropriate stakeholder review for feedback and revises accordingly.

Engagement

5. **APPROVE/RETIRE**
Approval authority approves draft or modification(s), and it becomes policy. If policy manager recommends retiring a policy, approval results in removal of policy from the library.

4. **CONSULT**
Policy manager consults with appropriate committee(s) and/or advisory group(s) as needed to get feedback, suggestions, and concurring approval prior to routing to approval authority.

January 20, 2021

Standardized Policy Template

University Policy

Responsible Office: Enter responsible office name. *(required)*

Enter policy title. *(required)*

Rationale/Purpose of the Policy

Add a brief summary of the policy's primary objectives. *(optional)*

Definitions

Add explanations of key terms or concepts specific to the policy. *(optional)*

Scope

Add a general statement about who and/or what the policy applies to. *(optional)*

Policy Details

Add the content of the policy. *(required)*

Related UW–Madison Policies

List and provide a link to any other UW–Madison policies that are closely related to the policy itself and may need to be known to users of the policy. *(optional)*

Related UW–Madison Documents

List and provide a link to any other UW–Madison related documents that provide relevant information and may be necessary to ensure compliance with the policy. *(optional)*

External References

List and provide a link to any federal/state laws or regulations or any Board of Regents or UW System policies that mandate, authorize, or otherwise affect this policy. *(optional)*

University Policy

Policy Administration

Approval Authority

Indicate the position or office with the right to issue, approve, or enforce the policy. *(required)*

Policy Manager

Indicate the position (and by extension the incumbent in a position) responsible for the development and administration of the policy. *(required)*

Policy Contact(s)

Enter the information requested below for each individual who serves as a point of contact to answer questions on the policy and assist in interpretation of the policy. *(at least one policy contact is required; all information is required for each policy contact listed)*

Policy contact's position title.	Policy contact's position title.	Policy contact's position title.
Policy contact's full name.	Policy contact's full name.	Policy contact's full name.
Policy contact's email address.	Policy contact's email address.	Policy contact's email address.
Policy contact's phone number.	Policy contact's phone number.	Policy contact's phone number.

Policy History	
Effective Date	Select the date the policy goes (or went) into effect. *(required)*
Date Issued	Select the original date the policy was released to the university as approved. *(optional)*
End Date	Select the date the policy is no longer in effect. *(optional)*
Next Review	Select the date the policy is next scheduled for review. *(optional)*

Revised Dates

List all the dates the policy was revised, using MM/DD/YYYY format. *(optional)*

Reviewed Dates

List all the dates the policy was reviewed, using MM/DD/YYYY format. *(optional)*

Publishing Policy

▶ Only policies in the UW-Madison Policy Library are official university-wide policies.

▶ Three ways to include policy content on your website:

1. List policy number and title (only) with direct link to the policy in the policy library.

2. List policy number and title with direct link *plus* a brief description of the policy, making it clear that "This is a summary of the [policy name] policy. View the official policy [link] in its entirety in the UW-Madison Policy Library."

3. Use the available API (Application Programming Interface) to display policy library content in real time on your website. Contact policylibrarycoordinator@wisc.edu for more information.

Best Practices

▶ Avoid "shadow" policies: Do not maintain a copy of a policy on your website (except if fed by API).

▶ Avoid using the term "policy" to refer to documents that aren't, such as expectations, guidelines, procedures, rules, etc.

▶ Establish clarity on roles and responsibilities (policy manager, contacts, approval authority).

Best Practices

▸ Review the Guidelines for Policy Development at UW-Madison.

▸ Use the template for drafting new policies.

▸ For policy revisions:

- Extract policy from the policy library using print layout, "print to pdf" and then convert pdf to Word.

- Use "track changes" during your revision process.

- Submit to policylibrarycoordinator@wisc.edu a Word mark-up showing tracked changes when submitting policy revisions. Copy the Approval Authority so we know the change is approved.

UW-MADISON POLICIES BY VC AREA

VCFA POLICIES BY RESPONSIBLE OFFICE

- Environment, Health and Safety — 40 — 15%
- Transportation Services — 41 — 15%
- Accounting Services, Div. of Business Services — 37 — 13%
- Purchasing Services, Div. of Business Services — 34 — 12%
- Campus Planning & Landscape Architecture — 20 — 7%
- Environmental & Occupational Health — 6 — 2%
- UW-Madison Police Dept. — 4 — 2%
- Office of VCFA — 3 — 1%
- Data Management and Analytics Services — 2 — 1%
- Madison Budget Office — 2 — 1%
- Physical Plant — 1 — 0%
- Office of Human Resources — 87 — 31%

Next steps going forward

▶ **For campus:**

- Find policies more easily!

- Complete web cleanup

- Begin using the template for developing new and revised policies.

- Contact policylibrarycoordinator@wisc.edu for guidance, tools, and to publish new or revised policies in the library.

▶ **For the project:**

- Address outstanding issues

- Engage campus committees and other groups to seed strong policy management practices.

Discussion, questions or comments

UW-Madison Policy Library
policy.wisc.edu

Policy Library Coordinator
policylibrarycoordinator@wisc.edu

Policy Library Coordinator Role

▸ Play role of policy librarian and maintain the library.

▸ Act as friendly coordinator to shepherd policy development.

▸ Act as neutral party and impartial facilitator to implement consistent standards.

▸ Assist stakeholders in developing policy and navigating the process using appropriate tools, etc.

▸ Facilitate review processes, as appropriate.

▸ Train or educate constituents about good policy management practices.

PROVOST & VCAA POLICIES BY RESPONSIBLE OFFICE

Enrollment Management
14
9%

Office of the Provost & UW Libraries
6
4%

Academic Planning and Institutional Research
53
35%

Division of Continuing Studies
9
6%

DoIT
22
14%

Graduate School
49
32%
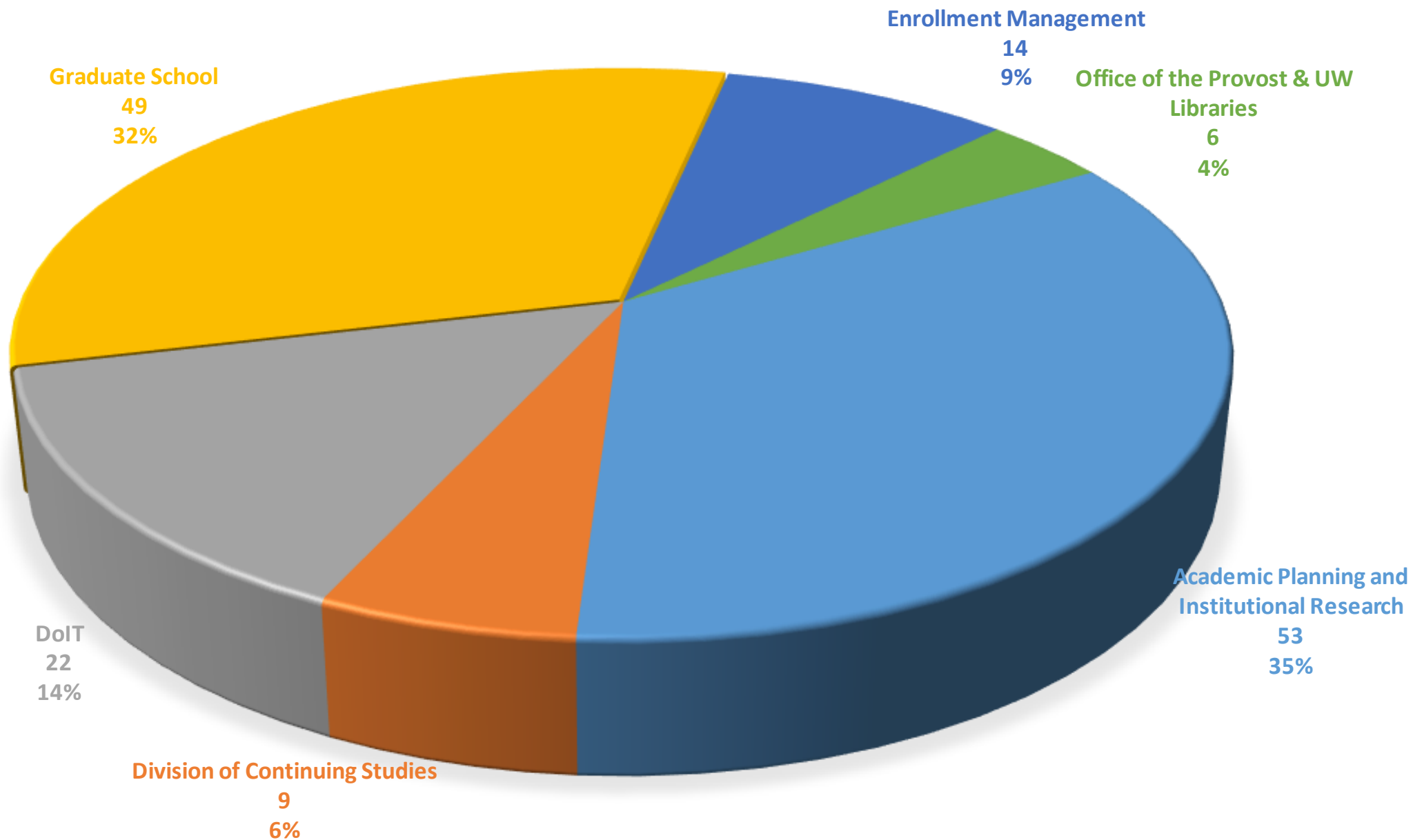
Non-Sponsored Project Form

Kayla Strohl and April Cook
Accounting Services
Division of Business Services

Updated Non-Sponsored Project Request Form

- New format designed to be more user friendly

- Added 233 project information

- Process remains the same for non 233 projects
  - Email completed form to sfssetup@bussvc.wisc.edu

https://businessservices.wisc.edu/documents/non-sponsored-projects-divisional-request-form/

Requesting New 233 Projects

- Updated form allows Divisions to request new 233 projects as needed

- Effective Immediately - Divisions are to obtain new 233 projects prior to sending gift fund payment requests to UW Foundation
  - ✓ Will aid in improving internal controls for gift deposits
  - ✓ Will ensure all fund 233 payments made by UW Foundation reference specific project number (no more "233NEW" in ARW)

- **Goal**: By end of June 2021 all 233 payments made by UWF reference a 233 project number

ATP - Finance Vision Workshop

Susie Maloney
Administrative Transformation Program

Finance Workshop

March 17

Future State Vision Workshop Key Objectives

- **What experience** will we create for our Finance professionals? What are the moments that matter?

- What **must the team uphold** in design to be successful?

- What are our **Finance transformation priorities**?

- **What key decisions** will Finance tackle in Planning, and **what information** do we need to know to decide?

Finance Future State Vision Workshop
Participants

David Murphy
Associate Vice Chancellor for Finance & Administration, UWMSN

Dan Langer
Assistant Vice Chancellor for Business Services, UWMSN

Julie Gordon
Sr. Associate VP for Finance, UWSA

Ginger Hintz
Assistant VP & Controller, UWSA
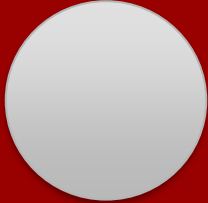
Renee Stephenson
Assistant VP of Budget Planning & Dev, UWSA
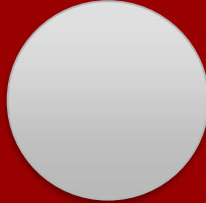
Taryn Carothers
Interim Vice Chancellor for Admin Affairs, UW-Whitewater

Sean Nelson
VP for Finance, UWSA

Brent Tilton
Director of Procurement, UWSA

Cindy Kluge
Director for Budget & Planning, UW-Milwaukee

Drew Knab
Associate Vice Chancellor for Finance & Business Services, UW-Milwaukee

Nicki Burton
Director of Shared Financial Systems, UWSA

Natalie Feggestad
Associate Dean for Finance & Administration, SoHE, UWMSN

Jackie Kriesel
Controller, UW-Eau Claire

Jennifer Klippel
Director, Madison Budget Office, UWMSN

Erin Hintz
Budget Officer, UWSP

Ann Iverson
Controller/Director of Business Services, UW-Parkside

Ken Mount
Sr. Associate Dean for Finance, SMPH, UWMSN

Angela Seitler
Associate Dean for Finance & Administration, CALS, UWMSN

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Themes from Moments That Matter

Leaders discussed the "moments that matter" in the finance lifecycle.

Planning (Budget)

- Integration of HR / Payroll information into projections
- Align budgeting with accounting practices
- Projections throughout the year

Accounting (Actuals)

- Consistency in use of accounts
- Simplicity and timeliness

Reporting

- Single source of truth
- Consistent data, flexible reporting to meet campus needs
- Ease of data access
- Budget to actual reporting

Analysis

- Trend analysis
- Drill-down functionality
- Forecasting

Design Guardrails

Leaders worked together to define design guardrails, or the boundaries and goals for reimagining business processes

Minimize customization	**Standardize processes across the System**	**Maximize Workday functionality**	**Eliminate need for ancillary systems**
Don't let striving for perfection hinder progress	**Think outside the box**	**Keep user experience in mind**	**Comprehensive user training from start to finish**
Easy to use, not complex	**Do it right without being in a hurry**	**Design with reporting in mind**	**Consider changing policy rather than accommodating**

Business Process Transformation

The following transformation activities will take place throughout Planning and Design:

1 VISION WORKSHOPS

2 TRANSFORMATION PLANNING WORKSHOPS

3 TRANSFORMATION DEFINITION & PRIORITIZATION

4 BUSINESS PROCESS DESIGN SESSIONS

5 OPERATING MODEL PROJECTS
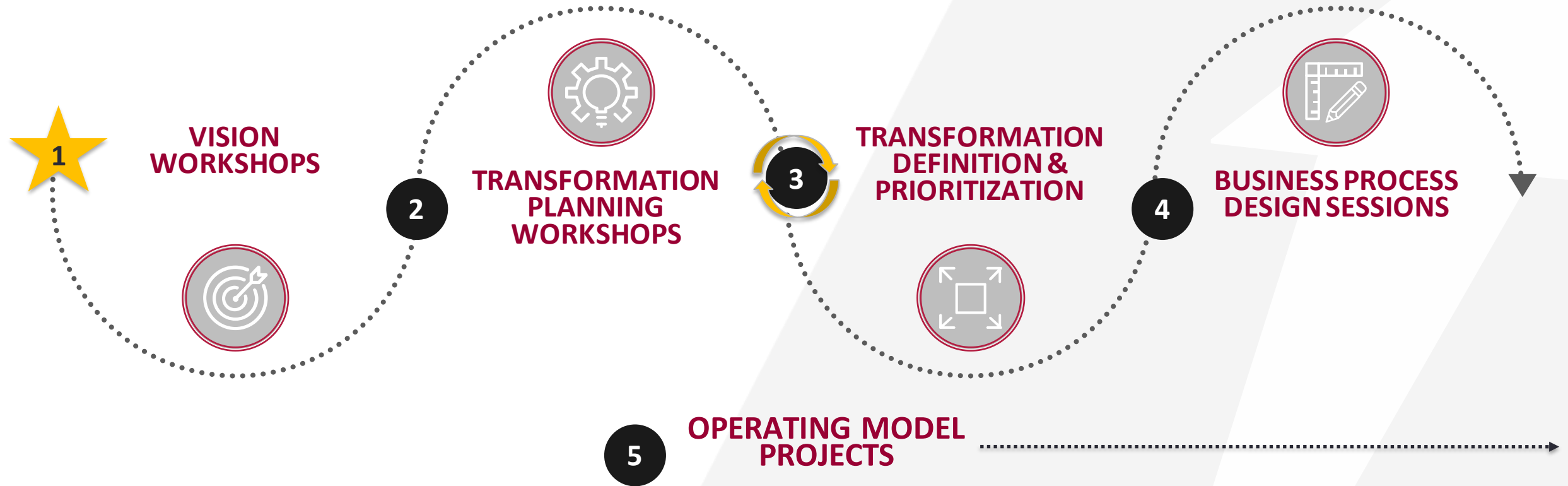
Preliminary Business Process Design

We will have 3 functional design approaches depending on the level of transformation

Operating Model Transformation
- Design new service delivery models and structures

Business Transformation
- Create new processes or fundamentally change how an existing process works to improve outcomes, including use of machine learning and AI

Process Optimization
- Streamline how processes are executed to improve quality and timeliness

TYPES OF OPERATING MODELS

The right operating model optimizes the delivery of cost-effective, flexible, quality service to all customers across the University

Service and Responsiveness ←——————————————————————————→ Scale and Efficiency

Decentralized

Enterprise (Standardized)

Centralized

Shared Services

- Autonomous departments
- Focus on responsiveness
- Different systems and nonstandard processes
- Separate functional staff

- Departments, divisions, or sites run similarly
- Typically some common sub-systems
- Common processes
- Separate functional staff with some duplication

- Single department, division, or site that performs the function
- Focus on efficiency and control
- Typically some common sub-systems
- No service level agreements or performance targets

- Separate organization but linked to customers through governance model
- Managed service delivery through clear SLAs
- Customer-driven transactions
- Performance-driven culture through measurement and feedback
- Process ownership end-to-end

Transformation Opportunities

Leaders* sorted 11 key Finance processes according to priority and opportunity for transformation

Operating Model Transformation
Design new service delivery models and structures

Business Transformation
Create new processes or fundamentally change how an existing process works to improve outcomes, including use of machine learning and AI

Process Optimization
Streamline how processes are executed to improve quality and timeliness

Process	Optimize	Transformation	Operating Model
Internal Billing		17	21
Accounts Receivable	1	18	19
General Ledger	9	18	11
Gifts and Endowments	12	15	11
Projects	7	22	9
Cash Management	9	20	9
Supply Chain Management	11	19	8
Tuition Remission	14	16	8
Budget	11	23	4
Fixed Assets	17	17	4
Expenses	19	18	1

■ Optimize ■ Transformation ■ Operating Model
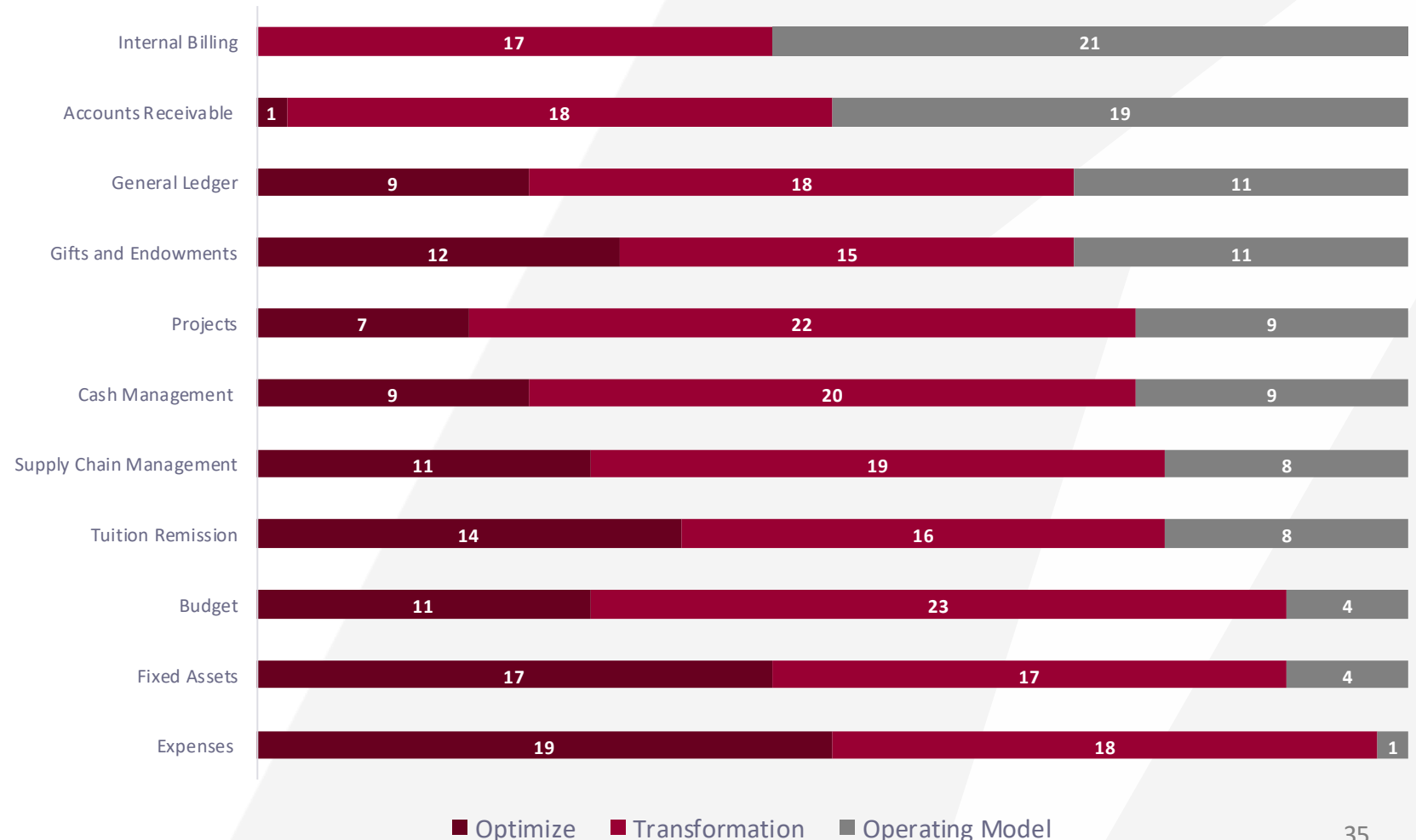
*Includes data from UW-Madison's FSMWG and UW-Milwaukee

Key Decisions

Leaders discussed and made two program decisions

Decisions received full support along with discussion about complexities that will need to be addressed as we move forward.

1. Will we **standardize the recording of revenue** across all funds?

2. Will we move to a **composite fringe rate**?

How many different funds exist within each fund type?

Stacked bar chart showing fund counts by campus and fund type (GPR, PR, Sponsored):

Campus	GPR	PR	Sponsored
UWADM	13	13	4
UWSYS	7	17	6
UWLAC	9	18	4
UWSUP	9	19	4
UWSTO	9	19	4
UWWTW	11	18	4
UWRVF	9	20	4
UWPLT	11	19	4
UWPKS	9	22	4
UWOSH	11	21	4
UWSTP	11	22	4
UWGBY	11	22	4
UWEAU	11	22	4
UWMIL	11	27	4
UWMSN	15	45	8
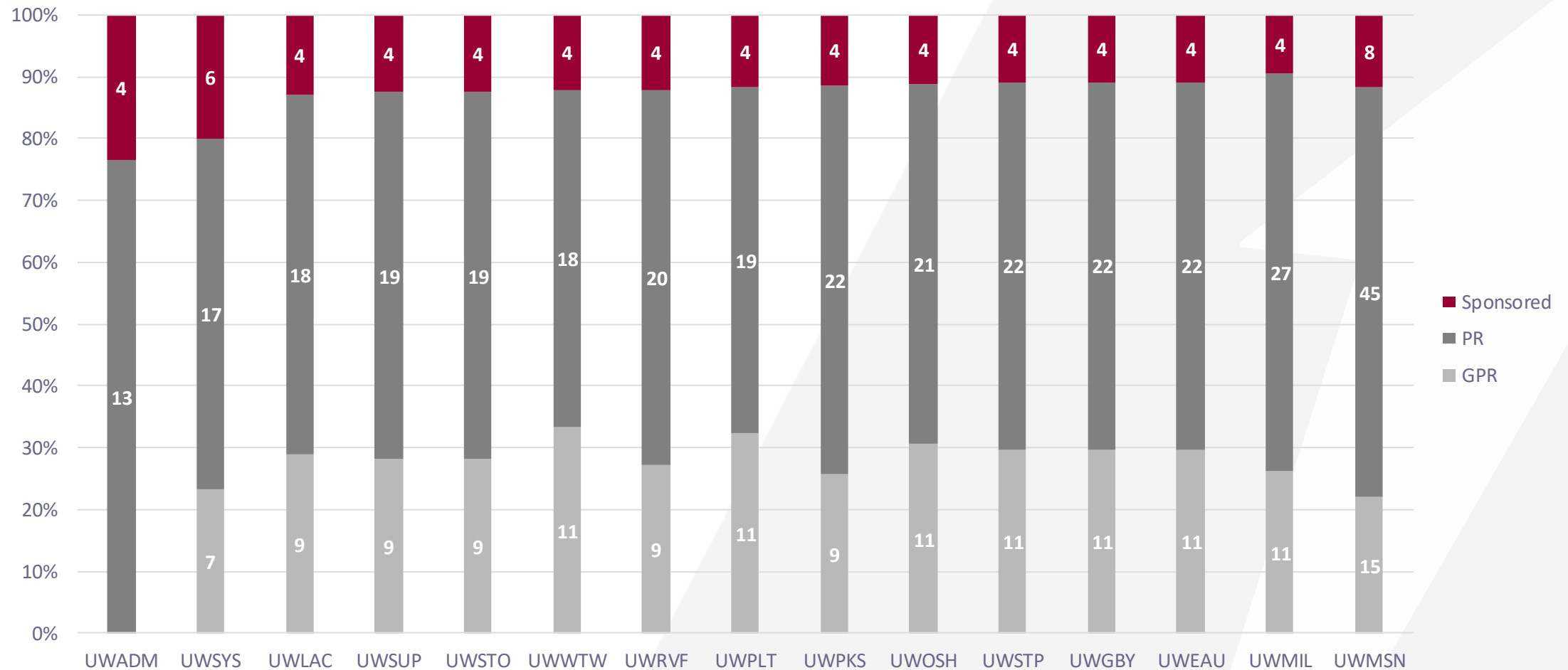
Art of the Possible

Potential Future State

- Spend our most restricted funds first

- Improved internal controls

- More realistic and meaningful forecasts, financial reports

- Better understanding of financial health across all funds and revenue growth needs / opportunities
  - Closer to GAAP reporting on a day-to-day basis vs. annual
  - Reliable data
  - Improved reporting

- Financial reports show all funds in the same way
  - Accruals for Revenue, Revenue Recognition using the same methodology

- Reduced financial services staff labor - effort spent on resolving allocation differences is changed to more value-added work
  - Reduced cost transfers

- More transparent, consistent, and clean accounting for FTE

Key Decision:

Will we standardize the recording of revenue across all funds?

Tier:

1 – Executive Sponsors

Seeking

Recommendation to take to Executive Sponsors

Recommendation

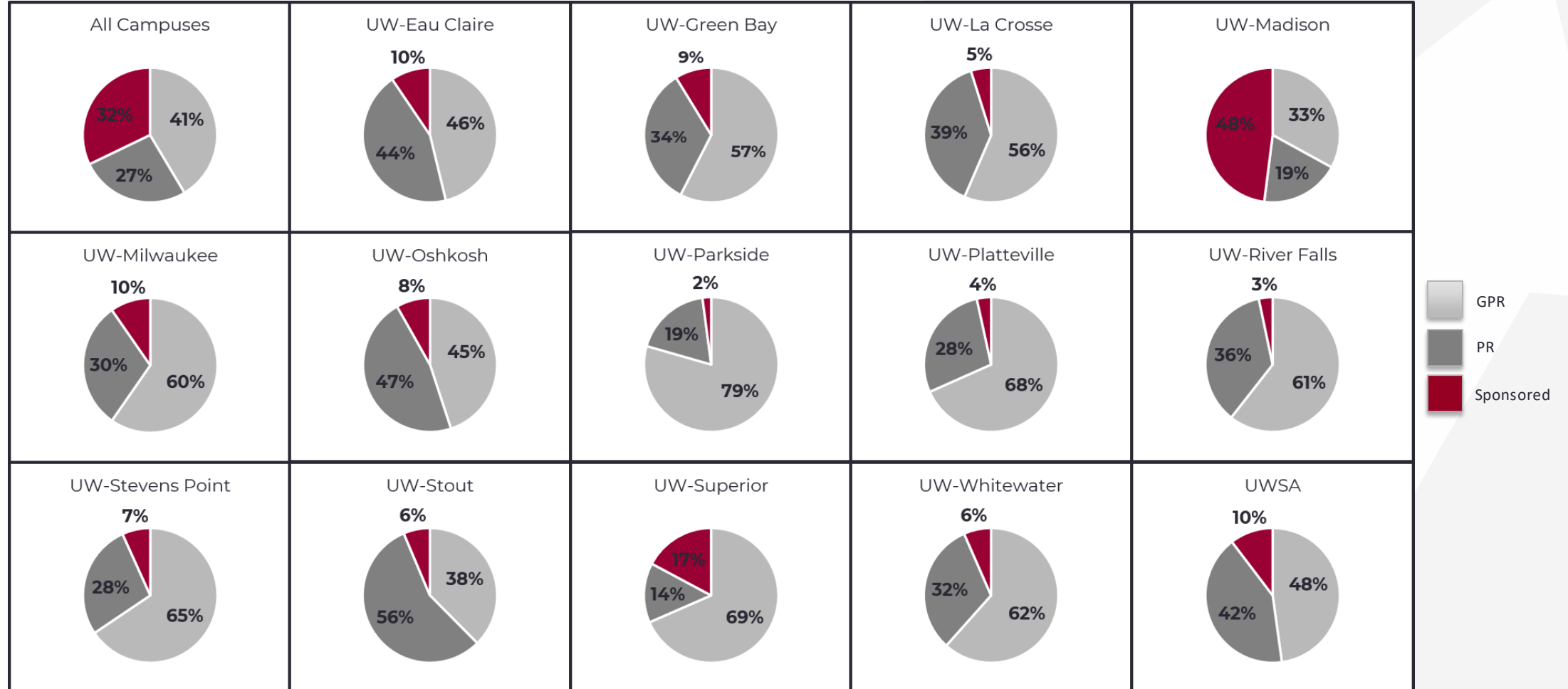**Standardize the recording of revenue across all funds**

Next Steps, If Decided

- What flexibilities can we explore/negotiate with DOA*? What will be built in the interface?

- Consider timing of state appropriation recognition

Decision Outcome

Standardize the recording of revenue across all funds using GAAP, based on when it's earned

What percentage of employees are tied to each fund type?

All Campuses GPR 41%, PR 27%, Sponsored 32%	**UW-Eau Claire** GPR 46%, PR 44%, Sponsored 10%	**UW-Green Bay** GPR 57%, PR 34%, Sponsored 9%	**UW-La Crosse** GPR 56%, PR 39%, Sponsored 5%	**UW-Madison** GPR 33%, PR 19%, Sponsored 48%
UW-Milwaukee GPR 60%, PR 30%, Sponsored 10%	**UW-Oshkosh** GPR 45%, PR 47%, Sponsored 8%	**UW-Parkside** GPR 79%, PR 19%, Sponsored 2%	**UW-Platteville** GPR 68%, PR 28%, Sponsored 4%	**UW-River Falls** GPR 61%, PR 36%, Sponsored 3%
UW-Stevens Point GPR 65%, PR 28%, Sponsored 7%	**UW-Stout** GPR 38%, PR 56%, Sponsored 6%	**UW-Superior** GPR 69%, PR 14%, Sponsored 17%	**UW-Whitewater** GPR 62%, PR 32%, Sponsored 6%	**UWSA** GPR 48%, PR 42%, Sponsored 10%

Legend: GPR, PR, Sponsored

*Denotes % salary funding type by funding line count. 1 employee could have multiple lines of funding - PR, GPR, and Sponsored funding.

How many employees have multiple types of fund types?
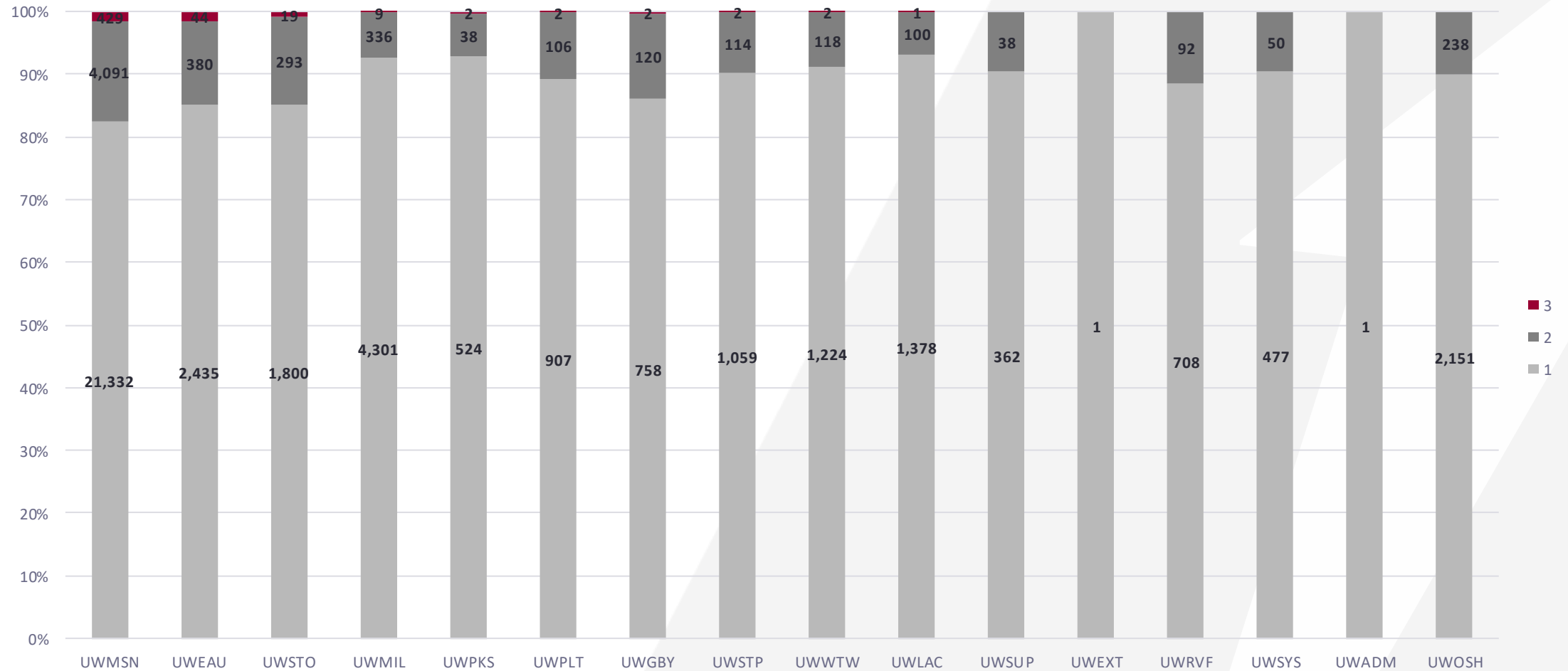
Art of the Possible

Potential Future State

- Eliminate inequities between GPR and PR funded divisions

- Equal treatment of employees

- Equal treatment across funds

- Easier to forecast by using the same rate regardless of fund

- Impacts of benefit changes are treated the same and can be smoothed by allocated rate

- Less time spent managing fringe costs (budgeting/forecasting, reconciliation, cost transfers)

- Allows decision-makers and stakeholders to understand true costs of activities and performance

- Low complexity in technical implementation
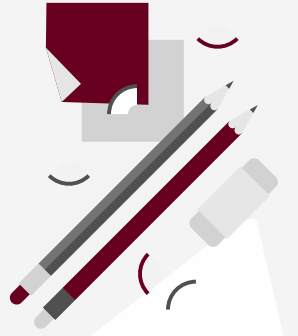
Key Decision:

Will we move to a composite fringe rate?

Tier:
1 – Executive Sponsors

Seeking

Recommendation to take to Executive Sponsors

Recommendation

Move to a composite fringe rate

- Considerations of actuals vs. pooled rates
- Smoothing year-to-year swings
- How will we pull GPR actuals to request supplement from the state?

Next Steps, If Decided

Decision Outcome

Move to a composite fringe rate, with guardrails in place to understand consequences

What's Next?

Vision workshops are the first step to prepare for Planning and Design

- Conduct Functional Vision Workshops
  - Reporting and Analytics (June 2021)

- Outcomes will be used to develop design teams and resource needs

- Begin Transformation Planning Effort (July 2021)

Tell us what you think.

Visit our website (**atp.wisconsin.edu**) to ask questions or share your feedback.

Shop UW+
April 16

Presenters:
Lori Voss/Hartley Murray
Dan Purcell
Liv Goff
Mari Ann Menager

CORs – New Process Launch

New process development and
testing by Purchasing Services

Users continue review
and renewal of their
orders in ShopUW+

| April | May | June | Fiscal Year 22 |

Begin review & renewal.

User's orders will be available in their
ShopUW+ Dashboard Work Basket

Year 2

Users run their own
report and take action
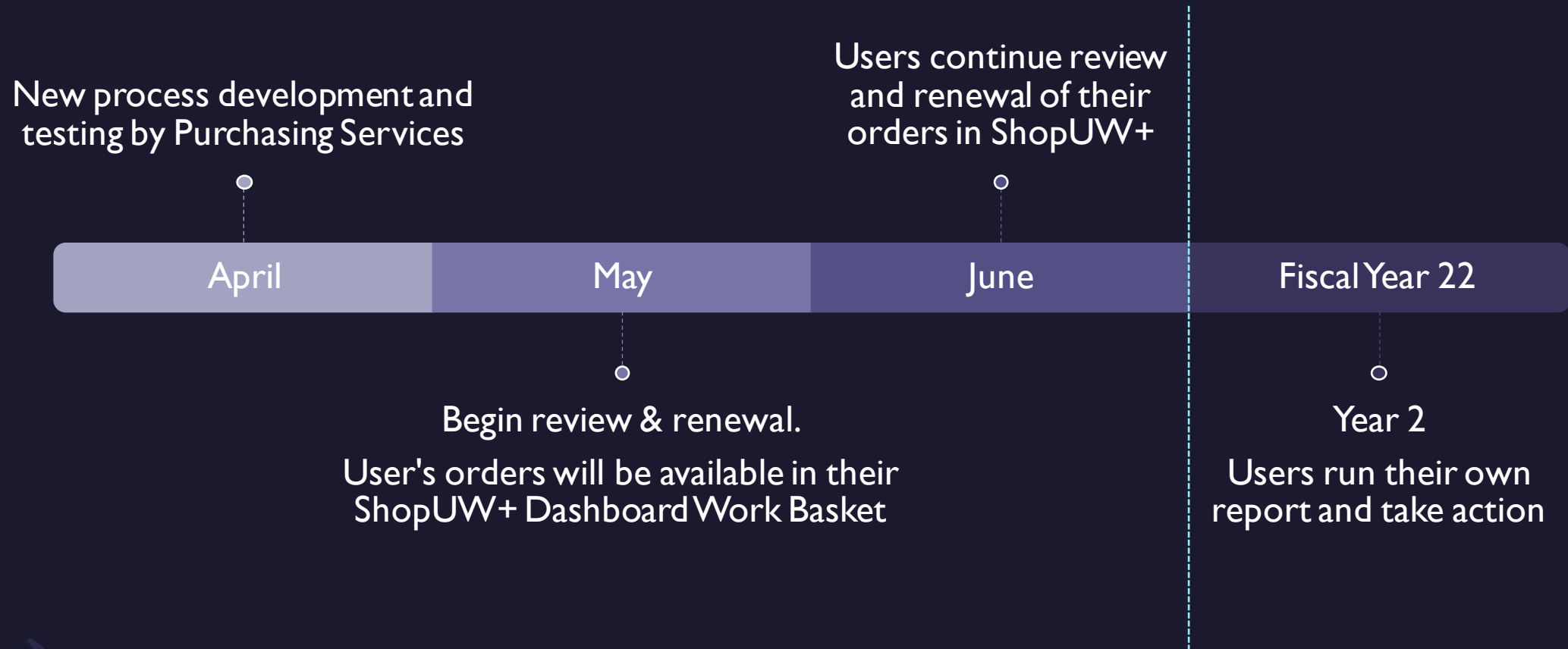
Airgas Cylinder Rental - New Process Launch

Existing Cylinders

- We will continue to utilize the current process **for all cylinders ordered through Shop@UW**. This means:
  - MDS will create invoices against MD#'s and load them into PAT for reallocation.
  - MDS will use a JET entry to bill the end users funding string on the 6th business day of each month.

New Cylinders

- **For new cylinders ordered in *Shop*UW+,** we will also bill at the beginning of each new month (Feb rental billed at beginning of Mar); however:
  - **We will direct bill the same funding string that was used for the initial purchase of the gas with the exception of the account code** (account code will be hardcoded to 2360).
  - PAT will <u>not be</u> used so **there <u>will not</u> be an opportunity to reallocate cylinder rental charges before they are billed**.

PAT

PAT will remain open for a few months after go live to accommodate Airgas Cylinder Rental for cylinders that are already on campus, MDS storage, and for any invoices received that relate to orders placed in the old system (Shop@UW). The PAT deadline will remain the same (6th business day of the month) until PAT is shut-down completely.

Time Sensitive Payments

Purchase Orders

Purchase requisitions can be submitted through the ShopUW+ Requisition Wizard as a "Pre-payment" so full or partial payment will be made at the time the purchase order is created.
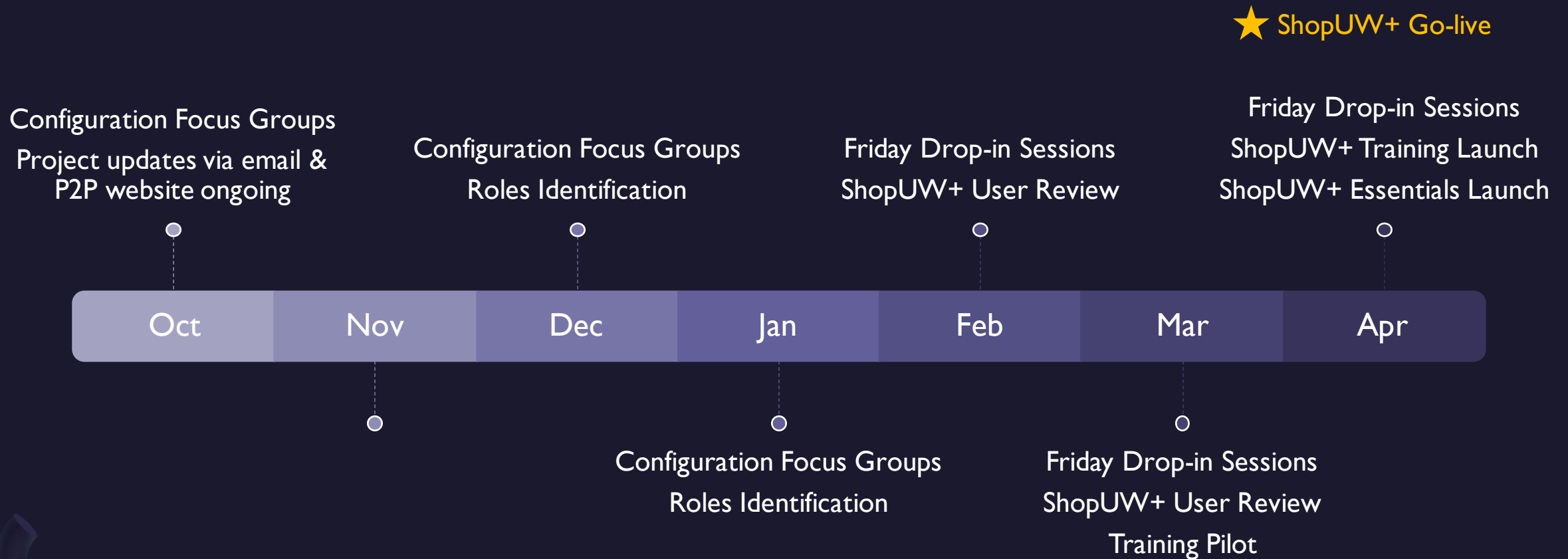
Direct Payments (DP) and Payment to Individuals (PIR)

For an **extreme emergency** a DP or PIR that needs to be paid by the next business day can be created in ShopUW+. Do not use for special handling payments, such as those with processing deadlines, unique mailing instructions, documents with list of payees, wires, foreign drafts, etc. These would be items formerly paid using an ET form.

Once **all department approvals have been completed**, an email request may be submitted to uwmsnap@bussvc.wisc.edu. The email must include the voucher number from ShopUW+, the vendor name and the amount of the payment. The email reference line should include "ET" and the vendor name (i.e." ET for Jane Doe").

The DP or PIR approvals must be completed, and the email request received in the uwmsnap@bussvc.wisc.edu email box by 9:00 am to be processed by the next business day.

Our Journey Together

⭐ **ShopUW+ Go-live**

Configuration Focus Groups
Project updates via email &
P2P website ongoing

Configuration Focus Groups
Roles Identification

Friday Drop-in Sessions
ShopUW+ User Review

Friday Drop-in Sessions
ShopUW+ Training Launch
ShopUW+ Essentials Launch

Oct	Nov	Dec	Jan	Feb	Mar	Apr

Configuration Focus Groups
Roles Identification

Friday Drop-in Sessions
ShopUW+ User Review
Training Pilot

P2P Transformation Partners by Division

Division #	School, College or Division Name	Name	Role	Dept/Unit	Email Address	Phone
1	General Education Administration	Dan Jonas	Budget and Finance Manager	Chancellor's Office	DANIEL.JONAS@WISC.EDU	(608) 890-4247
2	General Services - Support Services	Dan Jonas	Budget and Finance Manager	SUPPORT SERVCIES	DANIEL.JONAS@WISC.EDU	(608) 890-4247
3	Gen Educational Admin ASU	Lindsay Blang	budget & finance for OHR	ASU -AIMS, VCFA, OHR, Payroll, DoBS	lkblang@wisc.edu	no phone listed
4	Division of Student Life	Sue Duhr	SR BUDGET PLANNER/S	VCSA ADMINISTRATION	SUE.DUHR@WISC.EDU	(608) 263-5707
5	Division of Enrollment Management	Mallory Oller	Financial Specialist Senior	Office of Admissions-General Ops	mallory.oller@wisc.edu	no phone listed
6	Division of Information Technology	Colleen Reilly	Financial Progr Mgr	Purchasing	colleen.reilly@wisc.edu	(608) 262-5674
7	College of Agricultural & Life Sciences	Sandra Fowler	Assistant Dean	CALS Business Services	sandy.fowler@wisc.edu	(608) 262-3947
10	Division of International Studies	Poli Hyseni	Budget Manager	Dean's Office	poli.hyseni@wisc.edu	(608) 262-9511
12	School of Business	Katie Austin	Director of Business Services	Financial Management Office	katie.austin@wisc.edu	(608) 890-3322
17	School of Education	Toby Schellhase	ACCOUNTANT - JOURNEY	DEAN'S OFFICE	toby.schellhase@wisc.edu	(608) 262-1765
18	Arts Institute	Dan Jonas	Budget and Finance Manager	Administration	daniel.jonas@wisc.edu	(608) 890-4247
19	College of Engineering	Lori Snyder	Accountant	Fiscal Affairs	lori.snyder@wisc.edu	(608) 262-4081
27	School of Human Ecology	Michael Kukula	Senior Financial Specialist	School of Human Ecology Business Office	kukula@wisc.edu	(608) 890-2195
34	VCRGE	Russell Schwalbe	Asst Vice Chancellor	Accounting	russell.schwalbe@wisc.edu	(608) 262-8386
37	Collabo for Adv Learning & Teaching	Jessica Belcher	Admin Director/Finance & HR Mgr	WISCIENCE/Collab for Adv L&T	jbelcher2@wisc.edu	608-263-0478
40	Nelson Institute	Colleen Godfriaux	Associate Dean	Administration	clgodfriaux@wisc.edu	(608) 262-6435
42	Athletics	Marcel DuBois	Senior Procurement Specialist	ATHLETIC BUSINESS OFFICE	mcd@athletics.wisc.edu	(608) 262-0354
45	Law School	Jennifer Gardner	Accountant	Law School General	jennifer.gardner@wisc.edu	(608) 262-6297
46	Public Media	Paul Breen	Director of Business Services	Director's Office	paul.breen@wisc.edu	(608) 263-2115
47	Extension	Lisa Lake	Accountant	Extension, Office of Financial Services	lisa.lake@wisc.edu	no phone listed
48	College of Letters and Science	Mehdi Rezai	Assistant Dean	L&S Administration	mehdi.rezai@wisc.edu	(608) 263-2317
49	General Libraries	Jaime Bauman	FINANCIAL PROG MANAGER III	ADMINISTRATIVE SERVICES	jaimebauman@wisc.edu	(608) 262-8191
52	State Lab of Hygiene	Mark Conklin	Head of Purchasing & Acc Payable	Wisc State Lab Hygiene	mark.conklin@slh.wisc.edu	(608) 262-8802
53	School of Medicine and Public Health	Darlene Wood	ASC DIR, UNSPEC	FISCAL AFFAIRS	dwood2@wisc.edu	(608) 263-4931
54	School of Nursing	Padmini Prashanth	Financial Programs Supervisor	School of Nursing	pprashan@wisc.edu	(608) 263-5159
56	School of Pharmacy	Julie A Steinle	Financial Specialist	Business Services	julie.steinle@wisc.edu	(608) 265-8070
57	University Health Services	Holly Yan	Manager	Budget & Finance	hyan@wisc.edu	(608) 262-0131
63	Officer Education	Anna DeLong	Program Associate - civilians	Military Science/Officer Education	adelong2@wisc.edu	(608) 262-3411
71	Facilities Planning and Management	Dawn Ness	Asst Director Bus Ops/Purchasing	Business Operations & Purchasing	dawn.ness@wisc.edu	(608) 265-4215
77	University Police	Cindy Blankenship	ACCOUNTANT SENIOR CONF	OFFICE	CINDY.BLANKENSHIP@WISC.EDU	(608) 262-4529
80	University Recreation and Wellbeing	Jeff Sailor	FINANCIAL PROG SUPV	ADMINISTRATION	JEFF.SAILOR@WISC.EDU	(608) 890-2158
85	University Housing	Laura Morris	ADMIN OFFICER	BUSINESS SERVICES	laura.morris@housing.wisc.edu	(608) 262-8706
87	School of Veterinary Medicine	Fariba Kiani-Ananraki	Asst Director - Business Services	SVM Business Services	fariba.kiani@wisc.edu	(608) 263-9801
88	WI Veterinary Diagnostic Lab	Brenda Anderson	UNIV BUS SPEC SUP	ADMINISTRATION	brenda.anderson@wvdl.wisc.edu	(608) 262-5432
93	Divison of Continuing Studies	Steven Noftle	FINANCIAL SPECIALIST SENIOR	ADMIN & FINANCE	steven.noftle@wisc.edu	(608) 262-4660
96	Wisconsin Union	Lisa King	Financial Manager	Accounting	lmking3@wisc.edu	(608) 265-2446
98	Budget Office	Jennifer Klippel	DIR, BUDGET	MADISON BUDGET OFFICE	jennifer.klippel@wisc.edu	(608) 890-1842

Resources & Training

The ShopUW+ Essential Website is your hub for information on training, resources and support

https://shopuwplus.wisc.edu/

Customer Support

Telephone: **608-263-3100**

Email: uwsaproblemsolvers@uwsa.edu

In preparation for transitioning to ShopUW+, encourage your staff to:

❑ [Screenshot Shop@UW favorites](), funding strings, carts to recreate in ShopUW+ by 4/13

❑ Set-up profile, defaults, favorites, upon launch of ShopUW+ on 4/16

❑ Visit the [ShopUW+ Essentials website]()

❑ Bookmark [ShopUW+ Essentials]()

❑ Pin the ShopUW+ tile to MyUW Dashboard

❑ Take Training – all courses available by 4/14
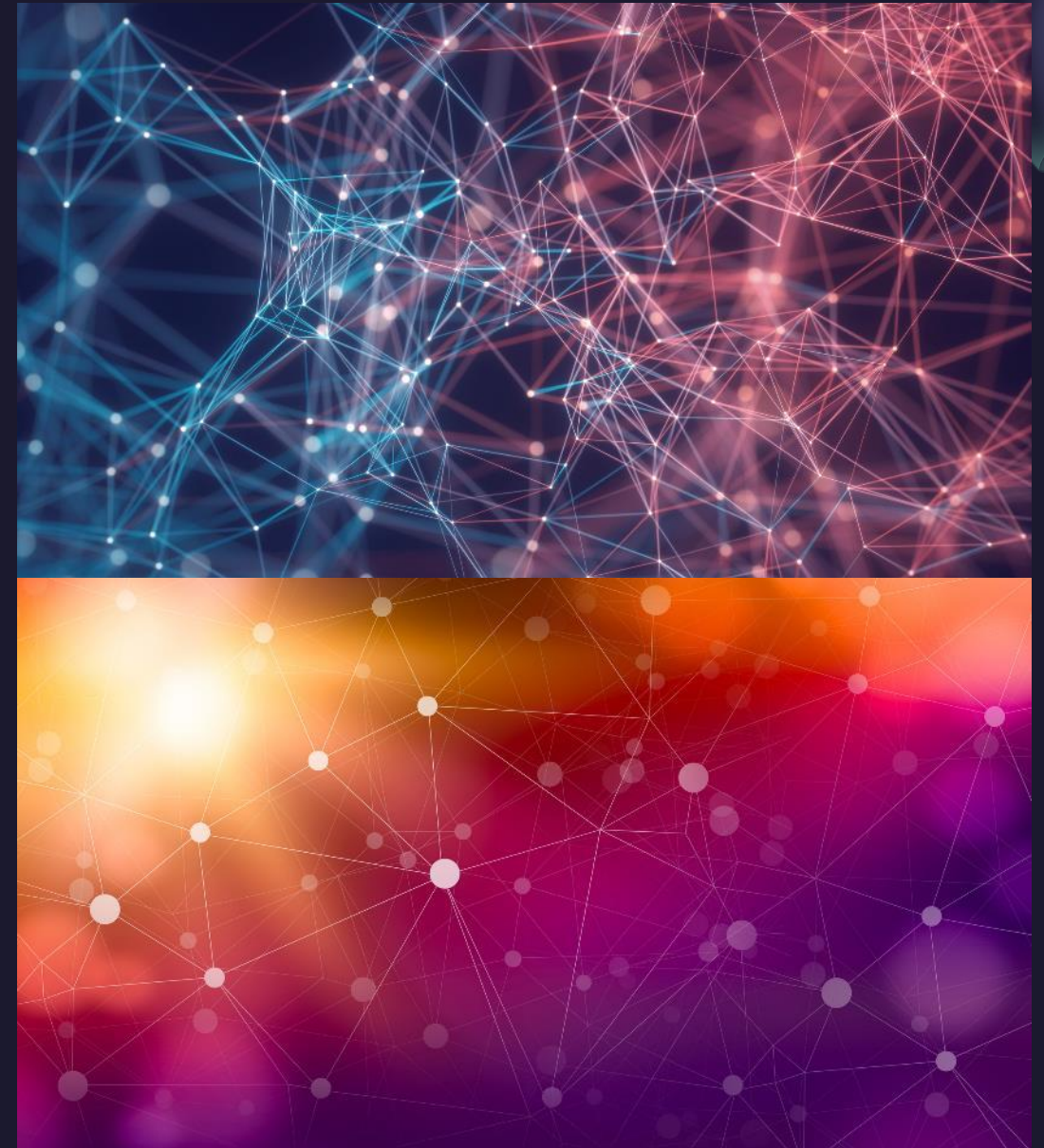
Thank you for joining!

Future Meeting Dates:
 Tuesday, June 8, 2021
 Tuesday, August 10, 2021
 Tuesday, October 12, 2021
 Tuesday, December 14, 2021