

Faculty/Staff Orientation 2018-2019

Business Services – Tallent Hall 245

Business Services Website: <http://www.uwp.edu/explore/offices/businessservices/>

Business Services Staff: <https://www.uwp.edu/explore/offices/businessservices/staff.cfm>

Business Services Learning Sessions: <http://www.uwp.edu/explore/offices/businessservices/>

Business Services Documents: <J:\Campus Info\Business Services>

Delegation of Authority: <https://www.uwp.edu/explore/offices/businessservices/BusinessServicesDownloadableForms.cfm>

CONTACTS

Controller/Director of Business Services – Ann Iverson x3155

Assistant Controller – Beth Frederick x2608

Accounting – (Jennifer Agerholm x2781) Controller.Office@uwp.edu

- [WISDM](#) – Your source for detailed information regarding budgets, payroll, revenues, expenditures and encumbrances
- WISDM maintenance & training– update & creation of departments & projects; user setup/access
- Journal Entries, chargebacks, direct retros/salary expense transfers
- Asset Management recordkeeping
- <J:\Campus Info\Business Services\Funding String Reference>

Accounts Payable – (Debi Rigney x2272 and Joan DeVries x2247) AP.Office@uwp.edu

- A three day process for obtaining a check or an ACH payment with proper paperwork and signature (s).
- State law - Payment required to be made within 30 days of receipt of invoice.
- Invoices **MUST BE** sent directly to AP.
- Positive approval is an option on blanket orders.
- <J:\Campus Info\Business Services\Reference - Payment Tracking Logs>

Budget & Planning– (Kathryn Mustell-Watkins x2579) Budget.Office@uwp.edu

- <J:\Campus Info\Business Services\Budget - Blue Book and Bud Bal Reports>
- Budget Overview - For payroll changes/inquiries, contact HR@uwp.edu

Grants – Pre-Award (Tina Radley) radley@uwp.edu

Post Award (Jennifer Agerholm x2781) agerholm@uwp.edu

- <J:\Campus Info\Business Services\Campus Training\Grants Overview for After The Award.pptx>
- <J:\Campus Info\Grants office> (for a listing of fringe rates & active grants)

ProCard / Shop@UW – (Monica Litterer x2248) Purchasing@uwp.edu

- Shop@UW – generally next day service. (Office supplies, ink/toner, computer peripherals, lab supplies and equipment, MRO items, etc.) <http://www.bussvc.wisc.edu/shopuw/account.html>
- A ProCard (campus liability card) can be obtained by submitting an online application and completing an informative D2L learning session.
<https://www.wisconsin.edu/financial-administration/special-topics/purchasing-cards/>
- When ProCard reviewers/approvers sign their name approving an employee's log, they are confirming that the purchases made with the ProCard are in compliance with all State of WI purchasing rules and that all necessary supporting documentation is attached.

Purchasing – (Monica Litterer x2248) Purchasing@uwp.edu

- Requisition forms should be completed and sent to Business Services before the invoice arrives.
- UW-Parkside is an agency of the State of Wisconsin – WI sales tax exempt ES 40701
- [W-9's](#) and [Certificates of Insurance](#) are the responsibility of the department making the purchase.
- **Purchase Delegation Level**
 - Departments are delegated to place transactions for non-contracted items directly with vendors up to \$5K (except printing). Procurements \$5K+ require Purchasing pre-approval. Printing, including photocopies, from external vendors must be ordered through UWPKS Creative Services (Duplicating/Printing Services) regardless of dollar amount.
- **Mandatory Contracts**
 - The State Dept. of Administration has established over 200 mandatory contracts that the University must adhere to. Commodities include, but are not limited to, office supplies, furniture, lab supplies, software, computer equipment and peripherals, etc. Please contact the Purchasing Office for assistance.
- **Signatory Authority**
 - Any vendor document requesting signature (except a receipt to acknowledge delivery) should be forwarded to Business Services for review and approval. Signing of vendor contracts/agreements outside the scope of employment may incur a personal liability.

Travel/Concur – (Alyssa Totoraitis x2154) Travel@uwp.edu or amahn@uwsa.edu

- Business Services Travel: <http://www.uwp.edu/explore/offices/businessservices/travel.cfm>
- UW Travel Wise (Fox World Travel): <https://uw.foxworldtravel.com/>
- UW System Travel Policy: <https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/fppp/f36-uw-system-travel-regulations/>
- Traveler's Reference Guide: - <https://uw.foxworldtravel.com/wp-content/uploads/2018/01/TravelWiseTravelersReferenceGuide-January-2018.pdf>
- Candidate Travel Reimbursement – https://uw.foxworldtravel.com/wp-content/uploads/2018/01/UWTravelWiseVisitorsTravelGuide_Jan2-2018.pdf
- Booking Tool Quick Reference Guides: for <https://uw.foxworldtravel.com/user-guides/>

Travel e-Reimbursement/Corporate Card – (Debi Rigney x2272) Travel@uwp.edu

- A Corporate Travel Card (personal liability card) or a ProCard must be used for transportation (airlines, car rentals, etc.), lodging, and registrations. <https://www.wisconsin.edu/financial-administration/us-bank-travel-card/>
- E-Reimbursement Login: <https://uw.foxworldtravel.com/>
- E-Reimbursement Guides: <https://uw.foxworldtravel.com/user-guides/> (Under: User Guides /Tutorial/Publication Library/E-Reimbursement)
- Per Diem Calculator: <https://uw.foxworldtravel.com/rate-calculator/>

Business Services Staff Contact Information

Jennifer Agerholm - x2781	Ann Iverson – x3155
Joan DeVries - x2247	Beth Frederick - x2608
Alyssa Totoraitis – x 2154	Monica Litterer - x2248
Debi Rigney - x2272	Kathryn Mustell-Watkins - x2579
Business Services Front Desk - x2207	Business Services Fax - 262-595-2990

Hours: M-F 7:45 a.m. – 11:45 a.m. & 12:30 p.m. – 4:30 p.m.