Tax Exempt, Employer Identification Number, and WISDM

**Tax Exempt – only used when spending the University Funds approved by Student Allocation Committee**

Student organizations and clubs that are open to all students are eligible to apply for funding through the Student Allocations Committee. The Student Allocations Committee (SAC) distributes Student Segregated University Fees to requesting OSA recognized student organizations and clubs. Purchases made by club/orgs using the Student Allocations funding is Tax Exempt and should not include Wisconsin sales tax. Please use the Tax Exempt Certificate while making purchases or reservations on behalf of the student club/org with approved SAC funds. Please contact Rae Ann, OSA/Allocations Office Manager, for a copy of the Tax Exempt Certificate in the Oshkosh Student Association (OSA) office, Reeve Memorial Union, Room 208C.

**Fund raised and have funds, now what???**

**Employer Identification Number**

Club/Orgs are encouraged to open a savings and/or checking account with a financial institution for fund raising money. Any Orgs/Clubs raising fund raising money will need their OWN Federal Tax ID number referred to as an employer identification number (EIN). OSA recognized club/orgs may NOT USE THE UNIVERITY’S EIN NUMBER AT THE BANK TO OPEN AN ACCOUNT. This money is not the university’s money – it is the club/org’s money, therefore, the club/org MUST USE their OWN EIN number to open an account at a bank NOT the universities. Please complete the five minute EIN application located on this link. [https://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Apply-for-an-Employer-Identification-Number-%28EIN%29-Online](https://www.irs.gov/Businesses/Small-Businesses-%26-Self-Employed/Apply-for-an-Employer-Identification-Number-%28EIN%29-Online). (Steps to complete the application for an Employer Identification Number (EIN) Online – may be found on the SAC website under forms.) The complete Policies and Procedures Manual is located on the Student Allocations Committee (SAC) website under [Forms](http://www.uwosh.edu/SAC/resources-1).

Titan Alumni Foundation Inc. will accept fund raising money from club/orgs. In a few cases fund raising money may be placed in the same account as the Student Allocated approved funds. There are always exceptions and the UW System, [G15 policy](https://www.wisconsin.edu/financial-administration/financial-administrative-policies-procedures/gapp-numeric-index/g15-student-services-funding/) covers those exceptions in terms of (grants, gifts, and contracts.) Additional questions may be asked at the OSA office in Reeve, Room 208C.

**WISDM Authorization Form**

Please complete the electronic WISDM Authorization form here: (<https://plonedev.uwosh.edu/adminservices/>). The advisor of the club/org will be considered the supervisor. Club/orgs will need **supervisor’s name and UW Oshkosh e-mail** so the form can be routed to them for approval. Once your advisor and the Financial Services Authorizer approve your request you will receive an e-mail with directions on how to access WISDM. ***\*Note: the routing of this document happens automatically and does not require any extra steps from the requester, besides clicking the “submit” button.\****

 **Supervisors/Club Advisors:**

You will receive an e-mail requesting approval for WISDM authorization, from your employees or club members. Once you click the link to the form it will show you a list of people waiting for approval. Click on the name next to the green check mark. This will bring up the requestors form. If all of the information is accurate and you approve of this person gaining access to WISDM go to the green toolbar above the individuals information; on the right hand side, next to “State:WaitingforSupervisor” is a drop down arrow. Click the drop down arrow and select: “I Approve.” the request will then be routed to our office for Financial Services Authorization. If you do not approve of the request, or you are not the supervisor for the requester please do not approve the form; send an e-mail to our office (metkea@uwosh.edu) informing us of this mistake. ***\*Note: Again, these documents automatically route once they have been approved and require no extra steps from supervisors.***

You will also notice on the new form we have added a request type; either authorization or de-authorization. We ask that when an employee/student leaves the department/club they complete this form so their access can be revoked.

 If you have any questions on how to use the new WISDM Authorization form please visit the Administrative Services website (<http://www.uwosh.edu/admin_serv/Financial%20Services/forms-1>), or contact Angie at metkea@uwosh.edu in the Administrative Services Office or Rae Ann in the OSA office at wetzelr@uwosh.edu.

Updated on 08/09/2018 by Rae Ann W., approved by Jeanne S., UW Oshkosh Controller