United Way ePledge Administrator Guide

Your workplace guide for improving lives locally

Together, more than ever.
Donate today.
DONATE NOW
# ePledge Administrator Guide

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**ePledge**

ePledge is a web-based portal that supports your existing United Way workplace campaign. This portal allows employees to pledge online, eliminating the need to distribute, collect, and process paper pledge forms. This secure online interface allows communication directly to employees, and provides real-time pledge tracking.
ePledge is easy to use, and assistance is provided by United Way staff throughout your campaign.

**What are the benefits?**

- Eliminates the need for paper pledge forms, saving time, paper and the environment
- Increases accuracy and confidentiality of donor information
- The donor is able to view past giving and to update their information and submit their pledge directly
- Donations are processed automatically, with receipts for credit card gifts emailed directly to the donor and a payroll report generated for Human Resources to import directly into the payroll system
- Can generate a report of all employee gifts for incentive draws and status updates with one click
- Targets reminder communications to those who have not yet gone on the tool

**What is required?**

- Employee information two weeks prior to campaign kick-off including full name, email address, and employee ID
- Collaboration with your IT support team to white list emails and ensure internet access for employees
• Collaboration with your committee/communications team to create an effective communications plan to support role out of the tool
• ePledge training for canvassers and ePledge Administrators
• Continued efforts in canvassing employees and sharing communication about the United Way and the new tool

Employee Information

Basic employee information is required to create unique, secure user IDs and passwords specific to each employee. Please send this information to United Way in a password-protected Excel document with the following fields:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Gender (if available)</th>
<th>Department (if available)</th>
<th># Pay Periods Annually</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>12907</td>
<td>Aness</td>
<td>Symons</td>
<td>F</td>
<td>Resource Development</td>
<td>26</td>
<td><a href="mailto:asymons@unitedwayem.ca">asymons@unitedwayem.ca</a></td>
</tr>
</tbody>
</table>

Providing all of the above information assists United Way in matching employees to the correct account, avoiding duplication of records, and ensuring accurate information.

*Note: Please ensure the first, middle and last names are separated into distinct fields.*

Access and Login

United Way will send an email to employees on campaign launch with a personalized link containing embedded login information. When employees click the link, it recognizes who they are and pulls through the secure interface automatically.

*Note: Please ensure emails from epledge@unitedwayem.ca are whitelisted and not blocked by your organization's IT department.*
Once successfully logged into ePledge, employees will be taken straight to the pledge type selection and entry page.

As an administrator you will have two menus available to you:

1) Workplace Donor
2) ePledge Administrator

You can switch between these menus by selecting the appropriate role at the upper top right of your screen.

If you are monitoring more than one workplace, or wish to look at specific locations for your workplace, there will also be a "Change Organizations" option at the upper top right of your screen.
ePledge Administrator Menu

- Home - provides navigation information
- Change Password - allows you to update your password
- Status - allows you to track the status of your workplace campaign
- Employee Gifts - allows you to enter paper pledge forms on behalf of employees (if any) and resend Login email
- Reports - allows you to run campaign reports
- Documents - allows you to securely upload employee information for United Way
- Sign out – logs you out of the system

Change Password

When changing your password, it must contain the following:

- 8-50 characters in length
- at least one number
- at least one upper case and one lower case letter

Status

Allows you to view a snap shot of where your campaign is at:

CAMPAIGN STATUS

<table>
<thead>
<tr>
<th>Name:</th>
<th>Campaign Type</th>
<th>Total</th>
<th>Goal</th>
<th># Empe</th>
<th># Donors</th>
<th>Participation Rate</th>
<th>Average Gift</th>
</tr>
</thead>
<tbody>
<tr>
<td>We Care Home Health Services</td>
<td>Emp</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>$0.00</td>
</tr>
<tr>
<td>We Care Home Health Services</td>
<td>Corp</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>$0.00</td>
</tr>
<tr>
<td>We Care Home Health Services</td>
<td>Special</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

The figures being shown below are rollup amounts from subsidiaries.
Employee Gifts

Allows you to search for employees by name:

**TRANSACTIONS LIST**

<table>
<thead>
<tr>
<th>Name</th>
<th>Pledge</th>
<th>Payment</th>
<th>Pledge Type</th>
<th>Payment Type</th>
<th>Received</th>
<th>e-Payment Verification</th>
<th>Employer Name</th>
<th>Employer Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account, Mr. Tax</td>
<td>$260.00</td>
<td>$0.00</td>
<td>Payroll Deduction</td>
<td>None</td>
<td></td>
<td></td>
<td>We Care Home Health Services</td>
<td>1170935</td>
</tr>
</tbody>
</table>

When an employee is found a variety of information and action items become available:

- **$** The dollar sign in the first column allows you to enter a new pledge for the employee. This might happen if you have an employee who does not have email access.

- **✉** The first envelope allows you to resend the login email to the employee. The email you send will have a fresh link with the employees user id and password encrypted in it.

- **✉** The envelope further down the bar allows you to resend the confirmation email to an employee who has already made a gift.

- **❌** The delete symbol allows you to delete a pledge that an employee has made. Once the gift has been processed at the United Way office this option will no longer be available and you will need to contact our Finance Department to make changes.

- **✏️** The edit sign allows you to update a pledge that a employee has made. Once the gift has been processed at the United Way office this option will no longer be available and you will need to contact our Finance Department to make changes.
Reports

A variety of reports are available to help you monitor your campaign. Simply select the report you would like and click Submit.

REPORTS

- Employee List with Department
  Default parameters

- No Response Report
  Lists all employees who have not responded.

- Payroll deduction report
  Lists all payroll deduction pledges.

- Pledge Response Report ± with giving type
  All donors at workplace with giving type.

Simply select the report you would like to run and hit Submit.

Your report will take a moment to generate and then appear under Outputs. All reports automatically display in both pdf and csv. Simple click the report hyperlink to open the version you wish to view.

OUTPUTS

All reports produce a csv (Excel) and PDF output.
Click refresh to view your reports.
In order to download a report right click the link and save the report on your computer.

<table>
<thead>
<tr>
<th>Job Number</th>
<th>Job</th>
<th>Names</th>
<th>Date</th>
<th>#Pages</th>
<th>Size</th>
<th>Type</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>459483</td>
<td>Payroll deduction</td>
<td>Woodstock Hospital - Pledge</td>
<td>08/21/2016 01:45:23 PM</td>
<td>1</td>
<td>4780</td>
<td>pdf</td>
<td>Ready</td>
<td></td>
</tr>
<tr>
<td></td>
<td>report</td>
<td>Transaction Report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>459483</td>
<td>Payroll deduction</td>
<td>Woodstock Hospital - Pledge</td>
<td>08/21/2016 01:45:23 PM</td>
<td>0</td>
<td>461</td>
<td>csv</td>
<td>Ready</td>
<td></td>
</tr>
<tr>
<td></td>
<td>report</td>
<td>Transaction Report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Documents

Documents is a secure dropbox for employee information such as your employee file for setting up the system. Using a dropbox is a much safer way to share sensitive data than by email or memory stick. A document is added to the dropbox by selecting add, add a description of the file and find the file as you would if attaching it to an email.

**ADD DOCUMENT**

We Care Home Health Services
Description

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Effective</th>
<th>Expiry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose File: No file chosen</td>
<td>Click and paste here.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add  Cancel

Once your document is added it is also available to United Way staff working with you on your campaign.

**GENERAL**

We Care Home Health Services - Company
1340 Dundas St
London, ON NSW 886

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Effective</th>
<th>Expiry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employees Information Template.xlsx</td>
<td>Employee Information Template</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Add
Sign Out
Logs you out of the system, ensuring that employee information is securely locked and accessible only by re-entering your user id and password.

Workplace Donor Menu
• Give - allows you to see what you gave last year and begin the pledge process
• Profile - allows you to update personal information, and set preferences for correspondence
• Gift History – allows you to see your giving history for the past 5 years
• Sign out – logs you out of the system
Give

Here the donor can select how they would like to pledge and how much they would like to donate. Pledging options may vary by workplace.

Special Notes

• Those giving by credit card or electronic cheque will not enter their credit card/banking information on this page. After confirming their pledge details they will be directed to a secure page that processes their information immediately so that this information is never stored in our database or viewable to staff.

• One time credit card and electronic cheque pledges are processed and receipted by five business days. Monthly credit card and automatic withdrawal pledges begin in January and are receipted when the pledge is paid in full.

• If the workplace lands outside of the catchment area of Elgin Middlesex, all employee donations will be directed to the local United Way for the area where the workplace is located unless designated otherwise.

• Those wishing to designate a portion of their gift need to check the appropriate radio button below the pledge amount before proceeding to the next page. This will take them to a designation page that will not display without the option selected.

• Those interested in GenNextLevel are able to opt in to the program here by selected the appropriate option.

*Please refer to the ePledge Made Easy resource for additional details on making a gift through the online system.
Profile
The profile page allows donors and administrators to update their recognition name, personal contact information, contact preferences and combined giver status.

Gift History
The gift history page allows donors to view their past five years of giving history to United Way. The page provides a breakdown of all of the gifts processed per year and how the funds were received.

If a workplace is new to the online giving tool a complete history of giving may not yet be available.
Tax Receipting

Always check to ensure a donation is receiptable under Canada Revenue Agency tax receipting regulations before promising a tax receipt to a donor. One of the most unpleasant tasks a volunteer can face is telling a donor they will not be receiving a tax receipt after all.

Please remember, these are Canada Revenue Agency tax regulations. United Way must follow them to retain our charitable status. There can be no exceptions.

Gifts that are receiptable

- Direct cash, cheque and credit card donations of $20 or more are automatically issued a tax receipt. Donations of less than $20 will be issued a tax receipt on request.

- Direct cash, cheque and credit card donations are receiptable for the tax year in which they are received.

- Monthly donations will be receipted at the end of the calendar year. Payroll deductions will appear on T4 slips.

Additional questions or concerns?

Please let us know at epledge@unitedwayem.ca.