



United Way
of Greater Rochester
and the Finger Lakes

United Way of Greater Rochester and the Finger Lakes

2023 ePledge Guide

Updated 1/2023

Thank you for using United Way's ePledge system. This electronic tool is designed to make employee giving quick and easy.

WE'RE HERE TO HELP!

Please contact your relationship manager for any questions about ePledge, campaign materials, fundraising ideas and past reports. Team members from our IT and Finance departments are also available to help with login information, employee pledge questions and more. Contact your relationship manager to be put in touch with a member of the ePledge team.

To see a sample ePledge site, please use the following link and login credentials:

<https://secure.uwrochester.org/epledge/>

User ID: uwtest

Password: uwtest123

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SAMPLE TIMELINE

Below is a sample timeline to help you plan your ePledge campaign. Your relationship manager can help you with any of the steps listed below.

4-6 WEEKS BEFORE KICKOFF

- Campaign kickoff and close dates chosen
- Identify campaign key contacts such as Coordinator, IT and Payroll
- Start compiling employee data file (see How to Compile your Employee Date File section of this guide to learn more)
- Identify those who will test your ePledge site

2-3 WEEKS BEFORE KICKOFF

- Employee data file due to United Way
- Send any customized communications to United Way (CEO letter, image, logo, etc.)

2 WEEKS BEFORE KICKOFF

- Test your ePledge system
- Send any test issues or updates to United Way

DURING CAMPAIGN

- Pull reports from the system to see who has pledge and your total donations
- Reach out to United Way for any support with email reminders through ePledge, reporting and information

AFTER CAMPAIGN

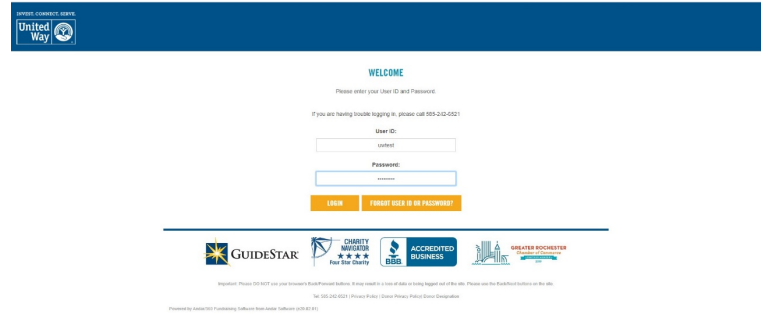
- United Way will close the ePledge system upon your request
- Final reports can be pulled by you for up to 2 weeks and any time after by United Way
- United Way will send a report for your payroll department to process pledges

EPLDGE WALKTHROUGH

You can use the sample ePledge site login on page 2 to walk through the site and/or walk through the images and information below. Your relationship manager is always available to walk you through the site and answer any questions you may have.

LOGIN PAGE

Your relationship manager will work with you to determine the login credentials for your employees. Some examples include email address, employee ID number or first initial and last name.



HOMEPAGE/GREETING

This is the first page your employees will see when they login and can be customized for your organization to include your logo, a welcome message from your CEO with their picture and signature. At this page employees can learn more about United Way or start their pledge by clicking "Give Now."

SELECTING A DONATION TYPE

United Way makes giving easy for your employees. Through ePledge, employees can donate through payroll deduction, credit card, direct debit/electronic check or choose to be billed. More information is also given on this page for those who would like to donate via cash or check, and you can customize this page with the person at your organization who will be in charge of those donations.

Donation Information	Contact Information	Review	Complete
1	2	3	4

Please select your donation type:

- Payroll Deduction
- Credit Card (\$25 suggested minimum)
- Electronic Check (\$25 suggested minimum)
- Bill Me (\$25 suggested minimum)
- No donation this year

If you would like to pledge by paper check or cash, please complete a paper pledge form. To obtain your form, please log off and see Amy Meisner for a paper pledge form.

For stock transfers, please notify United Way at 242-6531.

NEXT **CANCEL**

DONATION AMOUNT

After selecting a donation type, employees will be brought to a page requesting their donation amount. For payroll deductions they will be asked for their donation based on your pay periods or a one-time donation amount. For all other types of payments they will be asked for the total donation amount along with the start date and frequency of their donation.

Donation Information Contact Information Review Complete

1 2 3 4

Donation Information

Thank you for your donation! Please enter your donation information below.

Donation Per Pay Period:

Payroll Frequency: 26

Total Annual Gift:

NEXT **PREVIOUS** **CANCEL**

DONATION INFORMATION

On this page your employees will decide who they would like to help through their donation. They can give a portion of their gift to United Way's Community Fund, a Community Fund focus area or any agency participating in United Way's donor options program.

Donation Information Contact Information Review Complete

1 2 3 4

Donation Information

Thank you for your donation! Below you can give a portion of your gift to United Way's Community Fund, a Community Fund focus area or any agency participating in our donor options program.

We're here to help! If you have questions about designations or if you do not wish to share any part of your gift with a particular organization, please notify United Way at (585) 242-6469 or donorchoice@uwrrochester.org.

Total Donation	\$52.00
Total to Local Organizations	\$0.00
Total to United Way's Community Fund	\$52.00

Community Fund

Please consider giving a portion of your gift to United Way's Community Fund to support evidence-informed and preventative programs that help local people build a brighter future. Thank you for considering a gift to United Way's Community Fund. If your Community Fund selection completes your gift, please click next at the bottom of the page. If you would like to also give to a local organization, please complete the information below.

Name	Donation Amount
Yes! I'd like to support the Community Fund	<input type="text"/>
Meeting Basic Needs	<input type="text"/>
Giving Babies the Best Start	<input type="text"/>
Preparing Kids for Success	<input type="text"/>
Supporting Older Adults & Caregivers	<input type="text"/>
Helping Overcome Poverty	<input type="text"/>

Give to another organization or a local United Way

Step 1: Review the list of eligible agencies [Donor Options Brochure](#)
Step 2: Enter the agency ID# or keyword in the field below and click search.
Step 3: Select the agency you would like to give to and click the plus "+" symbol next to the Agency ID# to add the agency.
Step 4: Enter the amount you would like to give to this organization in the Amount box.

If you would like to donate to multiple agencies, please repeat these steps. Only select next below when your selections are complete.

Agency Name or Agency ID# **SEARCH**

NEXT **PREVIOUS** **CANCEL**

CONTACT INFORMATION AND PREFERENCES

Employees will then enter their contact information and preferences, including leadership giving societies they would like to join (if eligible based on their donation level), union member and retiree status, preferred email, date of birth and combining their gift with their spouse's/partner's gift. The only information required by your employees in this section is their work email address, but we'd love to know more about your employees whenever possible to celebrate their birthdays, invite them to networking events and keep them informed on how their donation is making a difference for our community.

REVIEW AND COMPLETE DONATION

Your employees will be able to review their information, make any updates if needed and complete their donation. They will then see a confirmation screen that they may print, and will receive a confirmation email with details about their donation if they've requested that one be sent.

Donation Information Contact Information Review Complete

1 2 3 4

Contact Information and Preferences

Please provide your work email address for your confirmation (if requested)

* Email:

Please verify your preferred address so that we can:

- Provide you a tax receipt if you pay by credit card or electronic check
- Confirm your donation selections
- Mail your statement if you asked to be billed

Address

Line 1:

Line 2:

City: State: Zip Code:

Country:

Items marked with an asterisk (*) are required

Send me an email confirmation

Leadership Societies

A donor who contributes \$1,000 or more (\$500 for ages 40 and under) is recognized as a Leaders United member and will be invited to connect with other leadership donors at events and networking opportunities throughout the year. Please indicate if you would like to join one or more of the following societies.

- African American Leadership Society
- Circulo Latino
- Emerging Leaders Society (gift of \$500 or more for ages 40 and under)
- Labor Leaders Club
- Women's Leadership Council
- Tonawanda Society (gift of \$10,000 or more)
- I want my leadership gift to be Fast Tracked

Additional Information

Union Member

Retired

Preferred Email:

Date of Birth (mm/dd/yyyy):

Please combine my gift with my spouse's/partner's gift.

Spouse's/Partner's name:

Spouse's/Partner's employer (if applicable):

Employer:

NEXT
PREVIOUS
CANCEL

Donation Information Contact Information Review Complete

1 2 3 4

Please review your information

Please review the information below and select continue to complete your gift or previous to make any changes. You will be able to print this information after you finalize your donation. Thank you!

Donation Type:	Payroll Deduction
Payroll Frequency:	26
Donation Per Pay Period:	\$2.00
Total Donation:	\$52.00

HOW TO COMPILE YOUR EMPLOYEE DATA FILE

ePledge allows United Way to enter in information about your employees and pay periods in advance to make pledging or donating easy for you your team. Below is information that is required and optional for you to include in your Excel file. Your relationship manger is available to answer any questions about how this file should be set up, and/or about the fields included. Please provide United Way with this file 2-3 weeks before your kickoff so we can get everything ready for your successful campaign.

REQUIRED FIELDS

First Name Middle
Initial Last Name
Employee ID (if available)
Number of pay periods for each employee Email
address
Gender
Work zip code (if outside of the Greater Rochester area)

OPTIONAL FIELDS

Department
Division
Job category Job
title
Worksite location
Building
Home address
Prefix/Suffix

You may provide up to five different optional fields to your file to help you sort your report during your campaign or after your campaign is complete.

FREQUENTLY ASKED QUESTIONS

Do all employees have to pledge through the ePledge site? What if employees don't have an email address or access to the website?

United Way offers many ways for donors to support our community. Your relationship manager can provide paper pledge forms or other ways for your employees to donate online.

How many organizations can employees choose to give to?

Employees can choose up to 3 organizations that they would like to support through ePledge. If your employees would like to support more than three donor choice organizations please email donorchoice@UnitedWayROCFLX.org.

What should I do if donors have trouble accessing the site?

We're here to help! For any technical difficulties, please contact Selma Miles at (585) 242-6521 or selma.miles@UnitedWayROCFLX.org or Mark Goodenough at (585) 242-6519 or mark.goodenough@UnitedWayROCFLX.org.

What should I do if donors have questions about or would like to change their donation information?

After donating through ePledge, your employees will not be able to log back in to change their pledge. If your employees would like to change their donation amount or the organizations they chose to support they can contact Nia Sargeant at nia.sargeant@unitedwayrocflx.org.

What are United Way's policies regarding donor information and privacy issues?

United Way does not rent or sell any information given to us by donors or organizations, and takes the security of this information very seriously. For more information about our privacy policies please visit uwrochester.org/About/Our-Policies.

My employees aren't receiving their confirmations – how can I make sure they get them?

Confirmation emails are sent from ePledge@UnitedWayROCFLX.org. To make sure donors receive these emails please ask your IT department to add this domain to your trusted senders list and spam filter: mail3.uwrochester.org and mail3.unitedwayrocflx.org at IP 65.37.77.213.

What about employees hired after we send you the data file? Can they use ePledge?

A new employee can be easily set up for ePledge at any time. Simply send the name, employee ID, email address and all other pertinent information to Selma Miles at Selma.miles@UnitedWayROCFLX.org. The new employee will be set up and the personalized link will be sent.

Can I turn in paper pledges after the ePledge site is turned off?

You can continue to collect paper pledge forms after your ePledge campaign is complete and can contact your United Way relationship manager to pick up these donation.

United Way of Greater Rochester and the Finger Lakes

75 College Avenue • Rochester, NY 14607-1009 P. 585 242-6400 W. UnitedWayROCFLX.org

What will happen at the end of my organization's ePledge campaign?

First, we celebrate together! Then United Way will provide you with an excel file your employee's donation amounts and payment types. This file can be used to upload employee pledges into your payroll system. This report will include all donations collected from your organization through any of the ways your employees can donate (ePledge, paper pledge forms, online). Let United Way know the date that your payroll department will need this file to begin process pledges so we can be sure to get it to you in plenty of time. Have questions about your report? Contact Nia Sargeant at nia.sargeant@UnitedWayROCFLX.org or Selma Miles at (585) 242-6521 or selma.miles@UnitedWayROCFLX.org.