



United Way
Waterloo Region
Communities

e-Pledge Administrator Guide 2019



<https://ecommunity.uwaywrc.ca>

iamtheone.ca



@unitedwaywrc

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e-Pledge Portal

e-Pledge offers a web-based portal that supports your existing United Way workplace campaign. This secure online interface allows communication directly to employees, and provides real-time pledge tracking. You can still distribute, collect, and process paper pledge forms for employees who prefer that method or you can go completely online and paperless. The choice is yours.

United Way's e-Pledge portal is easy to use, and assistance is provided by a United Way staff throughout your campaign.

What are the benefits?

- Decreases or 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, update their information and submit their pledge directly
- Donations are processed automatically, with receipts for credit card gifts e-Mailed 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 e-Mails to those who have not responded yet



What is required?

- Employee information 3 weeks prior to campaign kick-off including first and last name, e-Mail address, employee ID, number of pay periods, and employee type (employee or retiree), If not provided, then an employee self-registration process must be used.
- Internet access for employees
- Collaboration with your committee to create an effective communications plan to support your campaign and use of the e-Pledge tool
- Online portal training for your committee and e-Pledge Administrator (recommended)
- Continued efforts in canvassing employees and sharing communication about the United Way and the e-Pledge tool as an option for pledging

Employee Information

Basic information is required to create a secure personalized link to e-Pledge for each employee. Please send this information to United Way in an Excel document with the following fields:

Employee ID	First Name	Last Name	# Pay Periods Annually	E-Mail Address	Employee Type
4245	Taylor	Swift	26	tswift@companyabc.com	Employee

Providing all of the above information assists United Way in matching employees to the correct account, avoiding duplication of records and ensuring accurate information. Additional information can be provided as needed, e.g. department, branch, platoon, etc.

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

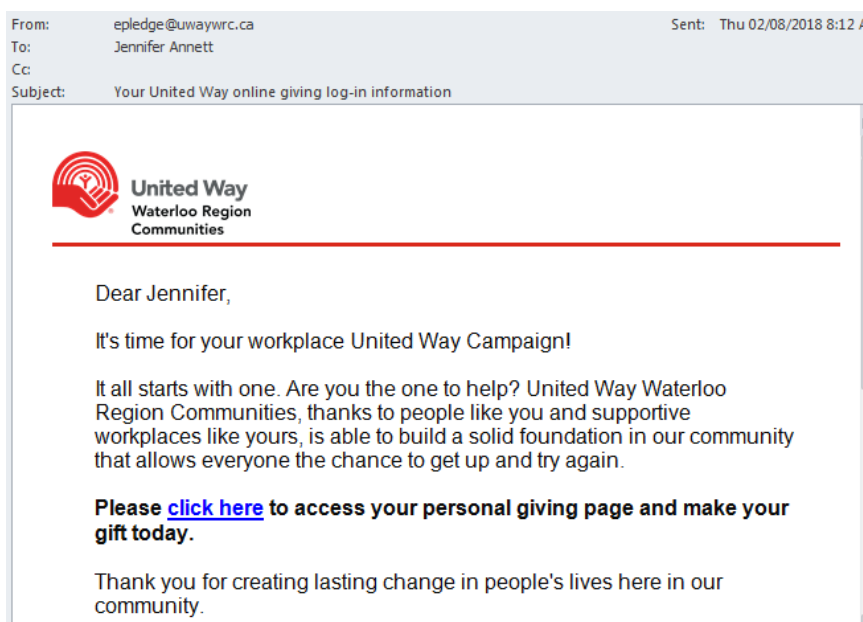
Access and Login

Employee Personalized Link

United Way will send an e-Mail to employees following 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 e-Mails from e-Pledge@uwaywrc.ca are not blocked by your organization's IT department.

The e-Mail will look something like this:



Employee Self Registration

If you are unable to share employee information with United Way for the purposes of setting up employee personalized links to e-Pledge, your employees will be asked to self register (if they wish to pledge).

To access e-Pledge employees will click on a workplace self-registration link. For example: <https://ecommunity.uwaywrc.ca/Companyxyz>

When accessing the workplace self-registration page, employees will be required to:

- Enter in an e-Mail address.
- Enter in the verification code on the screen.
 - If United Way's system has found an account match based on the e-Mail provided, the employee will not be required to provide anymore information.
 - If it did not find a match, employees will be required to to create an account.

Staff Online Giving Login

Please enter your work email address.

If you previously given a gift connected to this email address, after hitting "Continue" you will be sent a registration confirmation email with a link to sign into your online giving account.

If we don't have a record of your email address, you will be asked to complete a simple registration form and click "Continue". You will be logged directly into your new account and you are ready to make a donation!

* Individual Work Email

Items marked with an asterisk (*) are required

Verification code



Enter code

***Please Note:**

- For individuals creating a new account, once completed you will be directly logged into your online giving page. No further action is required.
- Individuals who already have an account, please continue reading the instructions.
 - Upon clicking "Continue", you will then be taken to a page indicating an e-Mail has been sent to the e-Mail address you provided to confirm your identity.
 - E-Mail will come from e-Pledge@uwaywrc.ca with the subject line "Registration Confirmation".
 - Click "Confirm" to confirm your identity.
- You will then be taken to your personal online giving page.

e-Pledge Administrator Menu

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

- 1) e-Pledge Administrator
- 2) Employee Donor

You can switch between these menus by selecting the appropriate role on the bottom left hand side of the page.

The e-Pledge Administrator menu will have the following options:

- Home - provides navigation information
- Organization Profile – allows you to update your organization’s information
- Campaign Status - allows you to track the status of your workplace campaign
- Admin
 - Reports – allows you to run campaign reports
 - Employees and Transactions – allows you to search for employees by name
 - E-Mail Employees – allows you to send e-Mails to employees via e-Pledge
 - Documents – allows you to securely upload employee information for United Way
- Logoff – Logs you out of the system, ensuring that employee information is securely locked and accessible only by re-entering your User ID and password.

Home

Once successfully logged into the e-Pledge Portal, e-Pledge Administrators will be taken to the following home page:



HOME PLEDGE ORGANIZATION PROFILE CAMPAIGN STATUS ADMIN LOGOFF

e-Pledge Administrators

Hi Jennifer,

Use the menu above to enter corporate or special event donation dollars (click "Pledge") on behalf of your organization, update your organization profile, view your campaign's status, and under "Admin" pull detailed donation and tracking reports, add employees and transactions, email employees, or upload documents to share with United Way.

Note: If you have completed paper pledge forms, you are encouraged to add them online (click "Admin", "Employees and Transactions"), or submit them to your United Way representative for entry. If you do enter them online your campaign thermometer will be more accurate. All employee transactions added online should be clearly marked on the paper pledge form as "Entered Online" "Date Entered" and paper pledge forms submitted to United Way for storage. If you need assistance, please contact epledge@uwaywrc.ca or (519) 888-6100 x253.

EMPLOYEE DONOR SWITCH ORGANIZATIONS LOGOFF

Pledge

Allows you to enter corporate or special event donation dollars on behalf of your organization.

Select Pledge Type → Enter Pledge Amount → Verification → Finished

Please select your pledge type.

- Corporate
- Workplace Special Event

Next

Cancel

Organization Profile

Allows you to update your organization's main address, main e-Mail and phone.

ORGANIZATION PROFILE

*Name	*Name 1 <input type="text" value="Regional Test Company"/>
	Name 2 <input type="text"/>
Main Address	Address Line 1 <input type="text"/>
	Address Line 2 <input type="text"/>
	City <input type="text"/> Prov: <input type="text" value="Ontario"/> Postal Code: <input type="text"/>
	Country <input type="text" value="Canada"/>
Mailing Address (PO Box)	Address Line 1 <input type="text"/>
	Address Line 2 <input type="text"/>
	City <input type="text"/> Prov: <input type="text" value="Ontario"/> Postal Code: <input type="text"/>
	Country <input type="text" value="Canada"/>
Business Email (Orgs Only)	<input type="text"/>
Business Phone (Orgs Only)	Area <input type="text" value="0"/> Number <input type="text" value="0"/> Ext <input type="text" value="0"/>

Items marked with an asterisk () are required

Campaign Status

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

If you have multiple locations, you can track each location by clicking the “All Locations” button.

CAMPAIGN STATUS

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita	
Regional Test Company	Emp	\$0.00	\$0.00	0	0	0%	0	0%	\$0.00	\$0.00	
Regional Test Company	Corp	\$0.00	\$0.00								
Regional Test Company	Special	\$0.00	\$0.00								

All Locations

Admin

Reports

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

WEB REPORTS

- Campaign Summary Report
Summarizes campaign statistics for the overall campaign
- Cash/Cheque Report
Shows all donors in the workplace that have pledged by cash or cheque.
- No Response Report
List of employees who gave last year and have not yet given to this year's campaign
- Payroll Report
List of all employee payroll donors with number of pay periods, number of deductions and amount deducted per pay.
- Pledge Response - with gift type
List of all employee donors with giving type.

Submit

Your report will take a moment to generate and then appear under “My Outputs”.

Tip: Click the “Refresh” button to check on the status of your report.

MY OUTPUTS

In order to download a report right click the link and save the report on your computer.

Refresh

<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	C 116123	Campaign Summary Report	University of Waterloo - Pledge Summary Report 1	07/05/2018 09:16:08 PM	2	7858	pdf	Ready	
<input type="checkbox"/>	C 116123	Campaign Summary Report	University of Waterloo - Pledge Summary Report 1	07/05/2018 09:16:08 PM	0	367	csv	Ready	
<input type="checkbox"/>	C 113152	Campaign Summary Report	University of Waterloo Retirees - Pledge Summary Report 1	05/25/2018 01:27:35 PM	2	7847	pdf	Ready	
<input type="checkbox"/>	C 113152	Campaign Summary Report	University of Waterloo Retirees - Pledge Summary Report 1	05/25/2018 01:27:35 PM	0	364	csv	Ready	

Delete

Cancel

Once complete, two versions of your report will appear on the list. The first is a .pdf file and the other is a .csv file (spreadsheet).

Employees and Transactions

Allows you to search for employees by name:

TRANSACTIONS LIST

United Way Waterloo Region Communities - Master
 50 Sportsworld Crossing Drive
 Suite 220
 Kitchener ON N2P0A4

open all | close all




- United Way Waterloo Region Communities - Master
- IN OFFICE - Company

Campaign Year

Search for employee

	Name	Pledge	Payment	Pledge Type	Payment Type	Received	e-Payment Verification	Employer Name	Employer Account
	Annett, Mrs. Jennifer	N/R	\$0.00					United Way Waterloo Region Communities	3293

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

	<p>The dollar sign allows you to enter a new pledge for the employee. This might happen if you have an employee who does not have e-Mail access or if you have received paper pledge forms and would like to enter in the information via e-Pledge.</p>
	<p>The first envelope allows you to send an e-Mail to the employee.</p>
	<p>The second envelope further to the right allows you to resend the confirmation e-Mail to an employee who has already made a gift.</p>

Please contact the United Way by e-Mail e-Pledge@uwaywrc.ca to delete or update any pledges already entered and saved in the system.

e-Mail Employees

The system enables you to e-Mail employees during your campaign. This requires employee e-Mail addresses to be in the system already (either provided by your workplace to United Way, or provided by the employee directly during a previous pledge).

Simply fill in the options as seen below and click "Send". The e-Mail will get logged in the e-Pledge system and attached to the employee's account.

Note, there are some fields preloaded by the system that can be ignored. Unfortunately we cannot hide these fields at this time.

If you prefer, United Way staff can also send e-Mails on your behalf, through the e-Pledge system.

SEND E-MAIL

TO EMPLOYEES

Organization

United Way Waterloo Region Communities - Master
 50 Sportsworld Crossing Drive
 Suite 220
 Kitchener ON N2P0A4

open all | close all

- United Way Waterloo Region Communities - Master
- IN OFFICE - Company

Include Subsidiaries

Campaign Year

*Current Year ▼

Ignore {

Campaigns

- All Campaigns
- Annual Campaign
- Administration Campaign
- DO NOT USE Recovery Overpayments and No Pledge in System

Transactions Created

From

Sep 05 2017

To

Sep 05 2018

With Amounts

From

-9999999999

To

9999999999

Ignore

- ▶ Select (*All to include all sort field types)
- ▶ Select (*All to include all report sort field types)

SEND TO

Respondents

Non-Respondents

Ignore

Contact Rule Category: Donor Follow Up

COMPOSE

e-Mail Template: *None

Sender's eMail Address

Subject

File Edit Insert View Format Table Tools

Font Family Font Sizes Formats B I U

Undo Redo Text Color Background Color Link Bookmark Image Table Link

Ignore

Note variables: User ID

e-Mail Attachments: No attachments

Comm Log Subject Code: e-Pledge

e-Mail Job Log

Send




Cancel

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 e-Mail 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 e-Mail.

GENERAL

Regional Test Company - Company

File Name	Description	Effective	Expiry	
Employee Information Template.xlsx	Employee Information File			  

Add

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

Logoff

The logoff link can be found in the upper right hand corner of your screen. This ensures information is securely locked and accessible only by re-entering your User ID and password. You can return to the login screen from this page.

[CLICK HERE TO RETURN TO LOGIN PAGE](#)

Thank you!

Employee Donor Menu

The Employee Donor menu will have the following options:

- Home - provides navigation information, and your last year gift
- Pledge - allows you to begin the pledge process
- My Profile - allows you to update personal information, and set preferences for correspondence
- Admin – My History - allows you to see your giving history for the past 5 years
- Logoff – Logs you out of the system, ensuring that employee information is securely locked and accessible only by re-entering your User ID and password.

Home

Once successfully logged into the e-Pledge Portal, Employees will be taken to the following home page:



The screenshot shows the United Way e-Pledge Portal home page. At the top left is the United Way logo. To the right are navigation links: HOME, PLEDGE, MY PROFILE, ADMIN, LOGOFF. Below the navigation is a horizontal line. On the left side, there is a United Way Waterloo Region Communities logo. To the right is a thermometer graphic showing a goal of \$25,000.00 and a current amount of \$19,427.87. The main content area features a personalized welcome message for Jennifer, stating her 2017 donation was \$0.00. Below this are statistics about poverty, hunger, and literacy in the Waterloo Region. A section titled 'Are You the One?' explains the organization's mission and the impact of donations. Another section titled 'Taking Action' discusses social issues like hunger and homelessness. At the bottom, there is a call to action 'PLEASE DONATE TODAY.' and contact information for questions.

United Way
Waterloo Region
Communities

HOME PLEDGE MY PROFILE ADMIN LOGOFF

WELCOME JENNIFER,
YOUR DONATION TO THE 2017 CAMPAIGN WAS: \$0.00

1 in 10 people in Waterloo Region live in poverty.
1 in 20 households in Waterloo Region experience hunger.
Nearly 1 in 4 adults in Waterloo Region fall in the lowest levels of literacy.

Are You the One? How can we fight back? By being the one - one generous act at a time. Your gift is what powers United Way's crucial work, allowing us to target funds and mobilize on-the-ground efforts to tackle persistent social issues at the root. That's how we change lives, today and for years to come.

We are the Ones. When we work together to fight local issues, the results are evident. We can provide accessible services for everyone, where and when they need them. We can provide stronger, better-connected communities. We can provide pathways out of poverty. We can create a transformed community - and thousands of transformed lives.

Taking Action. Hunger. Homelessness. Social isolation. These are issues happening right here. Right now. And they aren't somebody else's problem. They belong to all of us. We must be the ones to confront these issues.

Eight Million Dollars Starts With One. **Are You The One?**

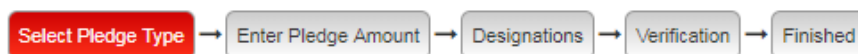
PLEASE DONATE TODAY.

If you have any questions, comments or would like to learn more about how your donation makes a difference, please contact epledge@uwaywrc.ca.

Pledge

Pledge Information – Select Pledge Type

This is the first page of the pledging process.



PLEASE SELECT HOW YOU'D LIKE TO MAKE YOUR DONATION.

- Credit Card One-Time Gift
- Credit Card Monthly Gift
- Payroll Deduction
- Cash
- Cheque

During the pledge process, please use the next and back buttons below and not your browser back button.

Next

Cancel

It offers all of the same options as the paper pledge form but eliminates the need for shuffling papers and multiple entries of the information.

Note: Some workplaces request United Way to remove the Cheque and/or Cash options due to the complexities of collecting cash and/or cheques within their workplace.

Pledge Information – Entering Amounts

Payroll

Payroll deduction is the most common way of giving.



Deductions will begin on the first pay date in January 2019.

Deduction Per Pay:	<input type="text" value=""/>
Pay Periods Per Year:	<input type="text" value="26"/>
Number Of Deductions To Make:	<input type="text" value="26"/>
Total Annual Pledge:	<input type="text" value="\$0.00"/>
Do you wish to designate your donation (OPTIONAL)? (\$100 minimum)	<input type="checkbox"/> Yes
If no, please leave the box empty and click "Next" to proceed to pledge Verification page.	

Next

Previous

Cancel

Most employees will have their number of pay periods prepopulated, if not, a drop down menu will appear to allow them to select the number of pay periods they have in a year.

The individual can also specify how many deductions they would like their gift to be made over if different than the number of pay periods displayed above.

The amount entered in the "Deduction Per Pay" box is multiplied by the "Pay Periods Per Year" (or the "Number of Deductions to Make" if different) to determine the "Total Annual Pledge."

An amount can also be entered directly into the "Total Annual Pledge" box.

If individuals wish to designate part of their gift (optional) they can do so by checking off the box at the bottom of the page where they have entered their pledge amount. When they click "Next" they will be taken to the donor designation page (refer to page 17 for more

information). Leave the box empty to keep donations 100% local in support of United Way network of charitable agencies.

Credit Card (One Time or Monthly)

The credit card option allows donors to give using American Express, MasterCard or Visa. Gifts can be one time or monthly. One time gifts will be processed automatically on the date they are entered. Monthly gifts will begin in January 2018 to allow the fulfillment of any ongoing payroll or credit card pledges.

One Time Example:



Tax receipts will be issued for donations of \$20 or more.

Total Annual Gift Amount:

- Next
- Previous
- Cancel

Monthly Example:



Donations by monthly credit card will continue until United Way is notified of a change. To make a change to your donation, please contact epledge@uwaywrc.ca.

Total Annual Gift Amount:

Payment Start Date: Jan 15, 2018

Payment Frequency: Monthly (Your donation will be divided into 12 equal payments and will occur on the 15th of every month.)

- Next
- Previous
- Cancel

The tool will process the gift automatically and issue a tax receipt by e-Mail when the gift is paid in full.

Cash or Cheque

The cash and cheque options allow the individual to pledge a gift and submit donation later.

Cash Example:



Tax receipts will be issued for donations of \$20 or more.

Total Annual Gift Amount:

Next

Previous

Cancel

Cheque Example:



Tax receipts will be issued for donations of \$20 or more.

Total Annual Gift Amount:

Cheque Date:

Cheque Number:

Next

Previous

Cancel

The page prompts the individual to print their confirmation and submit with payment to their Employee Campaign Manager.

Designations (Optional)

Donors have the additional option to designate some or all of their donation to a Canadian charity outside the local United Way network of supported charitable agencies (Listed here: <http://www.uwaywrc.ca/what-we-do/current-partners-investments/>). United Way network of agencies is in great need right here locally. Please consider keeping your donation 100% local.

Note: Designated gifts must be a minimum of \$100 and a \$12 administration fee will be deducted from each designated donation. There is no fee to designate to another United Way.

Click "Write In" to proceed with designating your gift. To keep your donation 100% local, click "Previous" to return to previous page, uncheck designations box, then click "Next".

DESIGNATIONS (OPTIONAL)

Donors have the additional **option** to designate some or all of their donation to a Canadian charity outside the local United Way network of supported charitable agencies (Listed here: <http://www.uwaywrc.ca/what-we-do/current-partners-investments/>). United Way network of agencies is in great need right here locally. Please consider keeping your donation 100% local.

Note: Designated gifts must be a **minimum of \$100** in order to be processed. There will be a \$12 administration fee deducted for each donation that is designated. This administration fee allows United Way Waterloo Region Communities to continue offering this service requested by some donors. If the registered charitable number is not included or the minimum gift is not met, the donation will be applied to the local United Way network of supported charitable agencies.

Dispersement of donations: One-time designated donations paid during the campaign will be sent to the charities the following April. Donations made through payroll deduction will be sent to the charities after all monies have been collected and remitted by the workplace to United Way Waterloo Region Communities.

Example: A payroll deduction donation is pledged in the fall of 2018. The donation is collected from the employee by the workplace and remitted to United Way throughout the following year (2019). The designations are distributed to the charities in April 2020.

To add a designation (optional) please click "Write In" below. To skip this step (keep donation 100% local), click "Previous" and uncheck the designations box, then "Next" to proceed to pledge Verification page.

Write In

Next

Previous

Cancel

WRITE-IN DESIGNATION

Total Pledge	\$100.00
Total Designated	\$0.00
Total Undesignated	\$100.00

Amount

Agency Name

City

**Canadian Registered Charitable
Number:**

*This number is required to process
your designation

Add

Cancel

To add a charity, click on the "Add" button and add the details of the charity.

Donor Information

You will be prompted on the Donor Information page to confirm certain details such as:

PLEASE CONFIRM YOUR INFORMATION BELOW.

Recognition Name	Line 1: <input type="text" value="Jennifer Annett"/>
	Line 2: <input type="text"/>
Main Address	Address Line 1: <input type="text" value="1157 Clyde Rd."/>
	<input type="text"/>
	City: <input type="text" value="Cambridge"/>
	Prov: <input type="text" value="Ontario"/>
	Postal Code: <input type="text" value="N1R 5S7"/>
	Country: <input type="text" value="Canada"/>

Items marked with an asterisk (*) are required

I wish to Remain Anonymous

I would like to receive my tax receipt by email (for all gifts except those shown on your T4).

Yes No

Would you like your gift combined with your partner's gift to be recognized jointly?

Yes No

Confirm your gift details on the next page.

Next

Previous

Cancel

If a leadership gift has been made it will ask for a recognition name, this is how the donor is recognized in public materials.

It will ask you to confirm your e-Mail address so the system can send a confirmation e-Mail and may ask for your home address for receipting purposes if you have given by cash, cheque or credit card, or if you have designated your gift to another charity so that they can thank you.

This is also where the employee can enter information in order to have their gift combined with their spouse's.

Review

The confirmation page provides a summary of your gift and any designations that you have made.

PLEASE REVIEW YOUR PLEDGE AND CONFIRM IT BELOW:

Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Number of Deductions:	26
Deduction Per Pay:	\$25.00
Total Current Pledge:	\$650.00
Total Pledge Year To Date:	\$1,150.00

Confirmation page may take a few moments to display. Please click Confirm only once. Thank you.

Confirm Your pledge will be recorded... Thank you!

Previous Go back and change pledge information

Cancel Exit e-Pledge (no pledge will be recorded)

When you hit "Confirm" the donation automatically uploads to the system for finance and payroll to run their reports.

The donor will also be sent a confirmation e-Mail with all of the information on this page.

Completion

The final page of the pledge process is where the donor will receive a thank you message on behalf of United Way Waterloo Region Communities.

My Profile

Most personal information can be updated through the profile.

MY PROFILE

*Name	Prefix	First	Middle	Last	Suffix
	Mrs.	Jennifer		Annett	
Gender	Female				
Recognition Name	Recognition Name - 1				
	Jennifer Annett				
	Recognition Name - 2				
Work e-Mail:	JAnnett@uwaywrc.ca				
*Home Address:	*Address Line 1				
	1157 Clyde Rd.				
	Address Line 2				
	*City				
	Cambridge				
	*Prov:				
	Ontario				
	*Postal Code:				
	N1R 5S7				
	*Country				
	Canada				
Work Phone:	Area	Number	Ext		
<input checked="" type="radio"/> Preferred	519	6211030	253		
Home Phone	Area	Number			
<input type="radio"/> Preferred	519	2408674			
Personal Cell Phone	Area	Number			
<input type="radio"/> Preferred	519	2408674			
Employer	United Way Waterloo Region Communities				
	50 Sportsworld Crossing Drive				
	Suite 220				
	Kitchener, ON., N2P0A4				
Employee ID					
User ID	JAnnett				
Password	*****				

Items marked with an asterisk (*) are required

Save


Cancel

Admin - My History

Gift History allows the individual to see their past 5 years of giving, including amount, type of gift and payment method.

MY GIVING HISTORY

▼ QUICK SUMMARY

Year	Pledge	Leadership Level	Combined Gift	Combined Level	
2017	\$805.00	Friend	\$825.00	Friend	

▼ RECENT TRANSACTIONS

Date	Pledge Type	Pledge	e-Payment Verification	
05/17/2018	Credit Card One-Time Gift	(\$5.00)		 
05/17/2018	Credit Card One-Time Gift	\$5.00		 
05/18/2018	Credit Card One-Time Gift	\$5.00		 
05/18/2018	Credit Card One-Time Gift	(\$5.00)		 
02/28/2018	Credit Card One-Time Gift	\$5.00	Accept	 
12/08/2017	Payroll Deduction	\$500.00		 

Logoff

The logoff link can be found in the upper right hand corner of the screen. This ensures information is securely locked and accessible only by re-entering your User ID and password. You can return to the login screen from this page.

[CLICK HERE TO RETURN TO LOGIN PAGE](#)

Thank you!

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

- Fully paid credit card donations of \$20 or more are instantly issued a tax receipt via e-Mail.
- Cash and cheque donations of \$20 or more are issued a tax receipt once received by the United Way office. These receipts are sent by postal or e-Mail (depending on donor preference) on a weekly basis.
- Donations of less than \$20 will be issued a tax receipt on request.
- Cash, cheque and credit card donations are receiptable for the tax year in which they are received.
- Pre-authorized credit card donations will be receipted at the end of the calendar year.
- Payroll donations will appear on T4 slips.

IT Requirements

Effective March 1st, 2019, e-Pledge will no longer support the use of certain older browsers when completing transactions. This is to ensure the checkout flow remains fast and secure for the vast majority of users.

The following will be the minimum browsers supported:

- IE 10+
- Edge 13+
- Firefox 42+
- Chrome 48+
- Safari 7.1+
- Opera 37+

Mobile:

- iOS Safari 7.1+
- Android Browser 4.4+
- Chrome Mobile 48+

These account for the vast majority of traffic. The older versions of these browsers, most of which are no longer supported by their manufacturers, do not support some of the modern technology uses to provide a safe and secure Checkout experience. While we will not be actively blocking these browsers, the checkout flow will no longer be guaranteed to work.

Contact Us

For additional assistance contact:

United Way Waterloo Region Communities

e-Pledge@uwaywrc.ca

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