

Online donations made easy. Start e-Pledge today!

e-Pledge is a secure online giving portal that supports your existing United Way Workplace Campaign. It allows employees to donate online, allowing you to decrease or even eliminate the need to distribute, collect, and process paper pledge forms, saving time, paper, and the environment.

What are the benefits?

- Donor can submit their pledge directly through a simple donation link
- Real-time donation tracking
- Increases accuracy and confidentiality of donor information
- Donor can view past giving, and update their information if needed
- Online donations are processed automatically, with receipts for fully paid credit card gifts emailed directly to donor and a payroll report generated for Human Resources
- Can generate a report of employee gifts for incentive draws and status updates
- Can target reminder emails to those who have not responded yet

How to begin?

1. Complete the e-Pledge Set-up Agreement
2. Provide employee information 3 weeks prior to campaign kick-off including employee first name, last name, email address, employee type (employee or retiree), and ideally employee ID, and number of pay periods (otherwise self-registration will be used)
3. Training for your e-Pledge Administrator provided by United Way
4. Share donation link with employees
5. Continue canvassing employees and sharing communication about the United Way and e-Pledge as an option for pledging

Our Commitment

- To work with you to ensure the smoothest possible implementation of online giving in your workplace
- To provide training and support to employees involved in administering the tool
- To maintain the confidentiality of all employee information shared with us

Workplace campaigns are integral to creating lasting community change and a community where everyone matters. For all of your dedication and support, *allow us to thank you by providing an innovative and easy campaign experience for you and your employees.*

For more information, please contact ePledge@uwaywrc.ca or 519-888-6100 x253

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e-Pledge Instructions

Log In

Click the link in your login email and, if prompted, enter your User Id and password (if provided). Most workplaces use employee emails as User Id and employee identification numbers as passwords.

If you are self-registering, or did not receive a login email, visit your workplace self-registration link which will resemble the following: <https://ecomunity.uwaywrc.ca/CompanyXYZ>. Enter your work email and the verification code.

You may receive a confirmation of identity email if you have used this email address in the past. Follow the instructions in that email to login. If you have never provided your email address before, you will immediately be logged into your new account.

Pledge

Click on the “Pledge” menu option at the top of the page to begin your donation.

1. Select Pledge Type

- Select how you’d like to make your gift (Credit Card One-Time Gift, Credit Card Monthly Gift, Payroll Deduction, Cash, Cheque). Options may vary depending on your workplace.

2. Enter Pledge Amount

- Credit Card One-Time Gift – enter the Total Annual Gift Amount you wish to give.
- Credit Card Monthly Gift – enter the Total Annual Gift Amount you wish to give (your donation will be divided into 12 equal payments and will occur on the 15th of every month (this is the default)).
- Payroll Deduction – enter the Total Annual Pledge you wish to give. Select the proper number of pay periods if it is not automatically populated.
- Cash – enter the Total Annual Gift Amount you wish to give.
- Cheque – enter the Total Annual Gift Amount you wish to give, the date of the cheque and the cheque number.
- Do you wish to designate your donation (OPTIONAL)? (\$100 minimum). If no, please leave the box empty and click “Next” to proceed to pledge Verification page (refer to step 4).
- Click “Next”.

3. 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.

- Click "Write In".
- Fill in the amount you wish to designate.
- Enter in the Agency name.
- Enter in the city in which the Agency is located.
- Enter in the Canadian Registered Charitable Number.
- Click "Add".
- Repeat if you wish to make more than one designation (maximum 3).
- Click "Next".

4. Verification

- Verify your personal information.
- Verify any other options provided (varies by workplace).
- Click "Next".

5. Finished

- Review your donation and click "Confirm".
- If giving by credit card, you will be directed to a secure banking page. Please confirm your billing information, provide payment details and click "Submit". An order confirmation email will be sent on behalf of "Cybersource" (the credit card processor) outlining your credit card payment details.
- A thank you email will be sent from United Way outlining your gift details.
- An electronic tax receipt will be automatically sent from United Way for fully paid gifts of \$20 or more (unless otherwise requested). All other tax receipts will be sent out weekly throughout the year as gifts are fully paid. Payroll gifts appear on your T4.
- If you selected a cash or cheque donation, please print the confirmation email and submit it with your donation to your Canvasser.

Log Off

Click Log Off along the upper menu to securely leave the system once your pledge is complete.

Note: Please use the e-Pledge system provided navigation buttons only. Do not use your computer browser's "back" button (top left) while completing your donation.

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e-Pledge Self-Registration Process

In most cases your workplace will automatically provide you with a login email to directly access your personal online giving page. However, some workplaces may prefer you self-register.

To self-register click on the link provided by your workplace. For example:
<https://ecomunity.uwaywrc.ca/Companyxyz>

When accessing your organization's self-registration page, you will be required to:

- Y Enter an email address.
 - If the system has found an account match based on the email you provided, you will be sent a "Registration Confirmation" email. Follow the login instructions provided in that email to access e-Pledge.
 - If it did not find a match, you will be required to enter personal information to create a new account. You will then be logged in automatically.

- Y Enter the verification code as it appears on the screen.

- Y Click "Continue" to proceed.

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

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e-Pledge Setup Agreement

Please provide the following information and consent for the setup of online giving as part of your United Way Workplace Campaign.

Contact Information	
Organization:	
Employee Campaign Manager:	Email:
e-Pledge Administrator:	Email:
e-Pledge Administrator:	Email:
HR/Payroll:	Email:
Training Date (e.g. e-Pledge Admin, Payroll, Committee)	
Date:	Location:
e-Pledge Campaign Dates	
Start:	End:

Privacy Statement

United Way Waterloo Region Communities is committed to protecting the privacy of your employees. The employee information provided for setting up online giving will be used to solicit your employees as part of your workplace campaign, acknowledge and recognize gifts, process and receipt donations and share information about United Way. An employee can unsubscribe at any time by clicking the unsubscribe button present on all of our communications. United Way does not sell or lease personal information.

By agreeing to implement employee online giving as a part of your United Way Workplace Campaign, you consent to the use of employee information, as provided by your workplace, to solicit employees for your workplace campaign.

Please check which employee information you will provide:

- Names
 Emails
 Emp IDs
 Pay Periods
 Employee Type (Employee or Retiree)

Name (Please Print)

Title

Signature

Date

Please provide the following information to ePledge@uwaywrc.ca *no less than 2 weeks before your campaign begins* to setup your e-Pledge website for your employees.

e-Pledge Access (select one or both)

- Send employees a personal e-Pledge access link via email
- Create a self-registration access link our organization can share

Employee Data File - A template of the file will be provided.

- Will upload through the e-Pledge "Documents" page or other file sharing location
- Will email it to ePledge@uwaywrc.ca
- Will be a complete staff list (all others in United Way database will be expired)
- Not Applicable (we are not providing employee data file)

Organization Logo – to be displayed on e-Pledge landing page

- Yes – will send a jpg or png file, no larger than 400x400 pixels
- No

Fundraising Goals – have you set goals for the campaign?

- Employee Gift - \$_____
 - Participation* - _____%
 - Special Events - \$_____
 - Corporate Gift - \$_____
- *If using participation, please specify number of employees engaged in e-Pledge campaign: _____

Campaign Thermometer

- Yes - Please display on Employee Home Page
If yes, please specify the preferred thermometer type:
 - Dollars Raised
 - Percent of Goal
 - Percent of Participation
- No Thermometer, thanks

Landing Page Message

- We will provide customized messaging to add to United Way messaging
- Use only United Way messaging

Emails

Messaging:

- We will provide customized messaging for each email
- Use generic United Way messaging

Dates:

- Launch email: _____ Time: _____
- Reminder email 1: _____ Time: _____
- Reminder email 2: _____ Time: _____
- Wrap-up email: _____ Time: _____

Giving Options – what options do you want available to employees? (Check all that apply)

- Payroll
- Credit Card
- Pre-authorized Credit Card
- Cash
- Cheque

Pay Periods for Payroll Deduction – please confirm with payroll department

- 1 or 26
- 12 or 26
- 26 or 52
- 24
- Custom –Please specify number_____
- Flexible – employees can have deductions taken over a chosen number of periods.

Pledge On-Going Replication (Perpetual Pledge) – a convenient option for employees to repeat the same pledge *year-after-year* (“Renew My Gift Until I Tell You To Stop”).

- Yes – confirm with your HR/Payroll Dept No

Pledge One-Time Replication – a convenient option for employees to pledge the same as last year, increase by a specified amount, or change their pledge type altogether *for this campaign year only*.

- Yes No

Retirees

- Yes, retirees will be included in the employee data file (please identify clearly as retiree employee type)

Other Data – what other data does your organization need through e-Pledge (collected when your employees donate)?

- Employee ID Department/Branch Other (specify): _____

e-Pledge System Security

- System server – Held in a locked room on-site, only accessible by United Way designated system administration staff and log in only possible with System Admin credentials
- SonicWALL firewall – “One of the most secure, sophisticated and widely deployed small business firewall platforms on the market today” with intrusion prevention, anti-malware, anti-spam, and content and URL filtering
- SSL Certificate – Renewed each July to ensure we have the most up-to-date security
- Network and system servers are monitored 24x7 by Security Operations center

Workplace Technical Recommendations

To ensure the smoothest possible launch of your electronic campaign, the following pre-requisites are recommended for each desktop that will be using e-Pledge:

- Configure email server to Whitelist incoming email from ePledge@uwaywrc.ca
- Java script enabled – version 8 or newer
- Session cookies allowed
- All users have their security set to the Internet Zone instead of Local Intranet
- Allow PDF attachments (for tax receipts)
- Browsers should have the Internet options/Advanced “Do not save encrypted pages to disk” unchecked so they can print PDFs
- 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+, Mobile Android Browser 4.4+, Chrome Mobile 48+
- Windows 7+
- If the e-Pledge screen does not appear quite right, donors are advised to attempt login from a more updated computer system.

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