

ePLEDGE CHECKLIST

Send the following information to your United Way account manager. Items marked with an asterisk * are required.

ePLEDGE OPTIONS FORM

- Complete the ePledge form. A fillable PDF of this form can be found in the online ePledge toolkit at heartaruw.org/campaign-toolkit.

I.T. DEPARTMENT

- Approval for emails from United Way to be allowed through your security settings.*
- Check email spam filters to allow emails from United Way.*
- Whitelist IP addresses.*
- Send United Way what browsers employees use so they can test the site on each.*

CUSTOMIZED MESSAGES

Find samples in the online ePledge toolkit at heartaruw.org/campaign-toolkit.

- Emails - Kickoff, first reminder, second reminder and final reminder
- Message to encourage donors to increase their gift or join a United Way affinity group (appears on Pledge Amount page)
- Personalized thank you message (appears on the log off page)

EMPLOYEE DATA

Provide in an Excel spreadsheet.

- | | |
|--|--|
| <input type="checkbox"/> First name* | <input type="checkbox"/> Division |
| <input type="checkbox"/> Middle name | <input type="checkbox"/> Location/Branch |
| <input type="checkbox"/> Last name* | <input type="checkbox"/> Number of pay periods (by employee if multiple pay periods schedules are used) |
| <input type="checkbox"/> Work email* | <input type="checkbox"/> Current United Way pledge per pay period |
| <input type="checkbox"/> Home address | <input type="checkbox"/> Information your HR needs to process payroll deductions (FT/PT/Exempt/Non-Exempt) |
| <input type="checkbox"/> Home phone | <input type="checkbox"/> Any fields required for administration/committee sorting |
| <input type="checkbox"/> User ID – can be the same as company ID | |
| <input type="checkbox"/> Unique employee ID | |
| <input type="checkbox"/> Department | |

COMPANY LOGO

- Company logo (color, JPEG or GIF file)*