

# ePledge Instructions

The following ePledge instructions will take you through the ePledge process using Payroll Deduction (additional deduction types are show at the end of the instructions and can be viewed by clicking on one of these options: [Credit Card](#), [Electronic Check](#), [Check](#), or [Stocks and Bonds](#).

There are 5 steps to completing the process (click on any link and it will take you to that section):

1. [Pledge Type \(Payroll Deduction, Credit Card, Electronic Check, Check, and Stocks/Bonds Distributions.\)](#)
2. [Pledge Designation \(Designate to Community Impact Fund or 501c3 of your choice.\)](#)
3. [Information Review \(Your address etc.\)](#)
4. [Review and Confirm Your Pledge \(Your pledge information.\)](#)
5. [Confirmation Screen \(Print and review for your records.\)](#)

**Before beginning Step 1** is is important to note, if you have made a pledge in the past the first screen you will see is the Pledge Replication screen. See Screen Shot Pledge Replication Screen below. You will choose one of the options in the screen shot below and you will then be sent to the corresponding Step (see 5 choices below).

If you have not made a pledge in the past you will start with Step 1.

You have 5 choices, if you choose -

1. pledge exactly like last year and click next you will move to Step 3.
2. duplicate last year but increase by percentage and click next you will move to Step 3.
3. duplicate last year but increase by this amount and click next you will move to Step 3.
4. change pledge this year and click next you will move to Step 1.
5. remove designations and pledge to Community Impact Fund and click next you will move to Step 3.

## Screen Shot Pledge Replication Screen

### PLEDGE REPLICATION

Prior Year Gift

<b>Pledge Type:</b>	Payroll Deduction
<b>Payment Type:</b>	*None
<b>Number of Month(s):</b>	12
<b>Number of Deductions:</b>	12
<b>Deduction Per Month:</b>	\$50.00
<b>Pledge Amount:</b>	\$600.00

<b>Designated to</b>	<b>Amount</b>
Humane Society of Huron Valley	\$600.00
Subtotal A	\$600.00

Pledge Options

- I would like to pledge exactly like last year
- Please duplicate my pledge from last year but increase it by this amount:
- Please duplicate my pledge from last year but increase it by this percentage:
- I would like to change my pledge this year
- I would like to remove the designations and pledge entirely to the Community Impact Fund:

Next

Cancel

# Payroll Deduction Step 1 – Pledge Type

The first step in making your pledge in the ePledge system is to enter the pledge amount and how you would like to fund it.

In this example the first screen shot shows the Payroll Deduction radial button indicated; you will enter the amount you would like to pledge monthly and the number of months and the system automatically calculates your total pledge. Once you have completed this step, click the next button.

## Screen Shot Step 1



### Please select your pledge type.

Payroll Deduction

Please enter the monthly amount in the space provided and then select the number of months you wish to pledge from the drop down box. You can also enter your total pledge and the monthly deduction will be calculated for you.

Deduction Per Month:

Number of Month(s):

Total Annual Pledge:

- Credit Card
- Electronic Check
- Check
- Stocks/Bonds/Distributions
- Sorry, I don't wish to give at this time.

# Payroll Deduction Step 2 – Pledge Designation

The second step in the ePledge process is designating your preference using Option 1 Community Impact fund, Option 2 Washtenaw County Focus Areas or Option 3 Give to another 501c3 Organization.

The screen shot below shows the pledge amount that was indicated in the previous screen (in this case the total pledge amount is \$1,200.00 = \$120.00 a month x 12 months), and the amount was designated to the Community Impact Fund under Option 1. If you prefer, you may indicate a Washtenaw County Focus area Option 2 or under Option 3 you will type the first few letters of the 501c3 organization and then click search and it will bring up all the organizations with those letters. You will then indicate the amount you would like to designate to that organization ([see Screen 2B](#)). You can designate any combination of the three options.

After this is completed click the next button.

## Screen Shot Step 2



Please enter the amounts for the designations of your choice.

Total Pledge	\$1,200.00
Subtotal A	\$1,200.00
Subtotal B	\$0.00

### Option 1: Community Impact Fund

**Local Dollars = Local Change** Your gift to the Community Impact Fund is the best investment you can make to create positive, lasting change. Each donation, no matter how big or small is critical to our success. United Way provides real-time responses and solutions to multiple local critical needs and emerging problems that no one agency can solve on its own.

Community Impact Amount:

### Option 2: I want to give to a United Way of Washtenaw County focus area:

Name	Amount
Early Childhood Care and Education	<input type="text"/>
Supporting School-Aged Youth	<input type="text"/>
Safety Net Health and Nutrition	<input type="text"/>
Homelessness and Housing	<input type="text"/>
Assisting Seniors	<input type="text"/>

### Option 3: I want to give to another United Way, agency, program, or initiative:

Name

City

State

Zip Code

Search for United Way funded partner agencies only.

## Payroll Deduction Step 2B - Searching for 501c3 Organizations

As mentioned previously in Screen 2, by entering the first few letters in the area under Option 3 the system will generate a list, on the next screen, of all the organization with those letters in their name. In this example I entered "Peace" and it brought up every 501c3 with "Peace" in their name. Enter the amount you would like to designate and it will automatically show-up, under Subtotal A. Subtotal B is the amount that is undesignated, in this case \$0.00. Click add and it will take you back to the previous screen where you will click the next button. (Please note the second screen shot below showing the screen you will see after you click the add button).

### Screen Shot Step 2B



Total Pledge	\$1,200.00
Subtotal A	\$1,200.00
Subtotal B	\$0.00

Please enter the amounts for the designations of your choice. Click the "Add" button at the bottom of page.

Agencies 1-6 of 6

Name	Amount
Friends of Peace & Justice in the Holy Land	
Interfaith Council for Peace & Justice	
Peace Education Center Pichon Project	
Peace Lutheran Church	
Peace Neighborhood Center	\$1,200.00
Peace River Center for Personal Development, Inc.	

If you are unable to find the agency you are searching for, please change your search criteria or click the Write In button below.

### Screen Shot Step 2B (after clicking add in previous screen)



Please enter the amounts for the designations of your choice.

Total Pledge	\$1,200.00
Subtotal A	\$1,200.00
Subtotal B	\$0.00

#### Option 1: Community Impact Fund

**Local Dollars = Local Change** Your gift to the Community Impact Fund is the best investment you can make to create positive, lasting change. Each donation, no matter how big or small is critical to our success. United Way provides real-time responses and solutions to multiple local critical needs and emerging problems that no one agency can solve on its own.

Community Impact Amount:

#### Option 2: I want to give to a United Way of Washtenaw County focus area:

Name	Amount
Early Childhood Care and Education	
Supporting School-Aged Youth	
Safety Net Health and Nutrition	
Homelessness and Housing	
Assisting Seniors	

#### Option 3: I want to give to another United Way, agency, program, or initiative:

Peace Neighborhood Center \$1,200.00

Name

City

State

Zip Code

Search for United Way funded partner agencies only.

# Payroll Deduction Step 3 – Information Review

Review your email, address, and privacy preferences and make any changes. When finished click next.

## Screen Shot Step 3



### PLEASE REVIEW YOUR INFORMATION BELOW

We use your information to:

- provide a tax receipt (if applicable)
- notify an agency of your gift (if requested)

Leadership Recognition Name(s):	Line 1: Deborah Schilz	Line 2: 
*Main Address	*Address Line 1: 1 First Street	
	Address Line 2: 	
	*City: Ann Arbor	*State: Michigan
	*Zip Code: 48105	
	*Country: United States of America	

Items marked with an asterisk (\*) are required

- I wish to no longer receive a paper pledge form.
- I want an acknowledgement  
I would like my local United Way and/or the agency(s) receiving my contribution to send me a written acknowledgement that they have received my gift.
- Please release my e-mail to my designated agencies
- Please release my mailing address to my designated agencies
- Release My Name
- I wish to Remain Anonymous

Register me for the United Way Loyal Contributor Program.

- Yes, I am a Loyal Contributor

I have been a Loyal Contributor since 2013



# Payroll Deduction Step 4 – Review and Confirm Your Pledge

The previous screen is where you confirmed your personal information and this screen is where you confirm your pledge information and the privacy information (from previous screen). Once all the information is correct click confirm and your pledge will be recorded. You will receive an email confirmation as well as you will be able to print the confirmation screen (next screen shot).

## Screen Shot Step 4



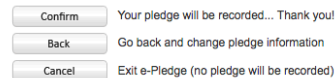
### PLEASE REVIEW YOUR PLEDGE AND CONFIRM IT BELOW:

Please carefully review your contribution information below. If you need to make any changes, you may do so by clicking on the BACK button. If the information is correct, click the CONFIRM button to send your contribution to the United Way (or CONTINUE to enter your credit card/banking information through CyberSource).

Pledge Type:	Payroll Deduction
Number of Month(s):	12
Deduction Per Month:	\$100.00
Total Current Pledge:	\$1,200.00
Total Pledge Year To Date:	\$2,400.00
<b>Designated to</b>	<b>Amount</b>
Peace Neighborhood Center	\$1,200.00
Subtotal A	\$1,200.00
Subtotal B	\$0.00

- I wish to no longer receive a paper pledge form.
- I want an acknowledgement  
I would like my local United Way and/or the agency(s) receiving my contribution to send me a written acknowledgement that they have received my gift.
- Please release my e-mail to my designated agencies
- Please release my mailing address to my designated agencies
- Release My Name

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



# Payroll Deduction Step 5 – Confirmation Screen (print for your records)

The final screen is the Confirmation Screen for your records. Click the print button if you would like a copy for your records or just click logoff and you're done!

## Screen Shot Step 5



### For your records...

Reference Number:	14086-713690
Pledge Type:	Payroll Deduction
Number of Month(s):	12
Deduction Per Month:	\$100.00
Total Current Pledge:	\$1,200.00
Total Pledge Year To Date:	\$2,400.00

Designated to	Amount
Peace Neighborhood Center	\$1,200.00
Subtotal A	\$1,200.00
Subtotal B	\$0.00

- I wish to no longer receive a paper pledge form.
- I want an acknowledgement
- I would like my local United Way and/or the agency(s) receiving my contribution to send me a written acknowledgement that they have received my gift.
- Please release my e-mail to my designated agencies
- Please release my mailing address to my designated agencies
- Release My Name



# Credit Card Transaction

The second choice for a pledge type is Credit Card. Add the amount and the frequency, in this example \$1,200.00 and Pay pledge one-time payment Jan 2017 then click next and it will take you to [Step 2 Pledge Designation](#). Please note: you will fill in your credit card information once your pledge is complete.

## Screen Shot Credit Card Transaction



### Please select your pledge type.

- Payroll Deduction
- Credit Card

To pledge by credit card, please enter a total pledge amount below and click Next to continue the pledging process. On the Verification page, you will be asked to click Continue to enter your credit card information through CyberSource, our electronic payment processor.

Pledge Amount:

Payment Start Date: Jan 01, 2017

- Pay in Full Now.
- Pay pledge over 4 quarterly payments.
- Pay pledge over 12 monthly payments.
- One Time Payment Jan 2017

- Electronic Check
- Check
- Stocks/Bonds/Distributions
- Sorry, I don't wish to give at this time.

# Electronic Check

The third choice is electronic check, fill-in the pledge amount and when you would like to make your pledge, in this case \$1,200.00 and pay in full now, then click next and it will take you to [Step 2 Pledge Designation](#). Please note: you will fill in your electronic check information once your pledge is complete.

## Screen Shot Electronic Check



### Please select your pledge type.

- Payroll Deduction
- Credit Card
- Electronic Check

To pledge by ACH/electronic check withdrawal, please enter a total pledge amount below and click Next to continue the pledging process. On the Verification page, you will be asked to click Continue to enter your banking information through CyberSource, our electronic payment processor.

Annual Pledge Amount:

Payment Start Date: Sep 07, 2016

- Pay in Full Now.
- Pay pledge over 4 quarterly payments.
- Pay total pledge amount over 12 monthly payments.
- One Time Payment Jan 2017

- Check
- Stocks/Bonds/Distributions
- Sorry, I don't wish to give at this time.

## Check

The fourth choice is personal check; fill-in the pledge amount and the check date, in this case \$1,200.00, January 1, 2017 and the check number, and then click next and it will take you to [Step 2 Pledge Designation](#).

The system displays this message before making your choice "Please make your check payable to "United Way of Washtenaw County". Print out two copies of your confirmation and keep one for your records. Attach your check to the other copy and forward to: UM Charitable Gift Office, 6080 Fleming Administration Building, 503 Thompson St, Ann Arbor, MI 48109-1340".

### Screen Shot Check



#### Please select your pledge type.

- Payroll Deduction
- Credit Card
- Electronic Check
- Check

Please make your check payable to "United Way of Washtenaw County". Print out two copies of your confirmation and keep one for your records. Attach your check to the other copy and forward to: UM Charitable Gift Office, 6080 Fleming Administration Building, 503 Thompson St, Ann Arbor, MI 48109-1340

Please make your check payable to "United Way of Washtenaw County". Include a copy of your confirmation with your check and forward to your campaign coordinator.

Pledge Amount:

Check Date:

Check Number:

Company has received payment:

- Stocks/Bonds/Distributions
- Sorry, I don't wish to give at this time.

## Stock/Bonds Distribution

The fifth and final option is Stock/Bonds Distribution. Please enter the total amount of your pledge and continue through the pledging process. Then contact our Director Finance for our brokerage information to transfer your stocks/bonds at 734-677-7212. Click next and it will take you to [Step 2 Pledge Designation](#).

### Screen Shot Stock/Bonds Distribution



#### Please select your pledge type.

- Payroll Deduction
- Credit Card
- Electronic Check
- Check
- Stocks/Bonds/Distributions

Please enter the total amount of your pledge and continue through the pledging process. Then contact our Director Finance for our brokerage information to transfer your stocks/bonds at 734-677-7212.

Pledge Amount:

Reminder Frequency: Yearly

- Sorry, I don't wish to give at this time.