ELECTRONIC PLEDGING

UNITED WAY
of the Plains

Checklist

We're excited you've decided to use ePledge for your United Way campaign! Please send the information below to your Associate Director of Philanthropy.

- ☐ Company logo (color, JPEG or PNG file)
- ☐ Campaign dates (both kickoff and completion dates)
- ☐ Payroll deduction start and end dates
- ☐ Desired pledge types:
  - ☐ Payroll deduction
  - ☐ Bill me
  - ☐ Credit/Debit card (Pay Now)
  - ☐ Credit/Debit card (Pay Later) - Donor will be charged based on schedule they select: one time, later date, monthly, quarterly
  - ☐ PayPal
  - ☐ Check/Cash - provide instructions of person/place funds should be delivered
  - ☐ No pledge at this time
- ☐ Number of pay periods (by employee if multiple pay period schedules are used)
- ☐ Offer designations or not
- ☐ Branches/Locations (if applicable)
- ☐ Information your HR needs to process payroll deductions (FT/PT/Exempt/Non-Exempt)

Premier Plan

If you are utilizing the ePledge Premier Plan, please provide everything above and the following:

- ☐ Employee data (provide as spreadsheet)
  - ☐ First and last name (in separate columns)
  - ☐ Work email
  - ☐ Unique employee ID (optional)
  - ☐ Number of pay periods (by employee if multiple pay period schedules are used)
  - ☐ Branch/Location (if applicable)
    - ☐ List of employees by location. Include each location's ZIP code in a separate column.
- ☐ If you are offering employees the option to designate their gift to the United Way of their choice, please provide the names and ZIP codes of each United Way to include.
- ☐ Custom email messaging - Your Associate Director can work with you to develop your email templates.

Questions? Contact your Associate Director of Philanthropy at (316) 267-1321.