ePLEDGE CHECKLIST

We're excited you've decided to use ePledge for your United Way campaign!
Please send information needed to build your site to your Relationship Manager.

BASIC PLAN // PREMIER PLAN

- ☐ Company logo (color, JPEG or GIF file)
- ☐ Campaign dates - *kickoff and completion dates*
- ☐ Payroll deduction start date
- ☐ 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

Everything above and...

- ☐ Employee data
  - ☐ First and last name
  - ☐ Work email
  - ☐ Unique employee ID *(optional)*
  - ☐ Current United Way pledge per pay period
- ☐ Custom Email Messaging - *Applicable if you plan for United Way to send emails out to your employees. Find templates at unitedwayplains.org/toolkit.*

Questions? Contact your Relationship Manager at (316) 267-1321.

United Way

United Way of the Plains