

# 2024 Self- Registration ePledge Guide

**Local Love** in action



**United Way**  
Kingston, Frontenac,  
Lennox and Addington

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## ePledge Overview

ePledge makes giving to United Way easy and simple. The secure online portal allows employees to pledge online, eliminating the need to distribute, collect, and process paper pledge forms. It also allows you to view the status of your campaign in real-time.

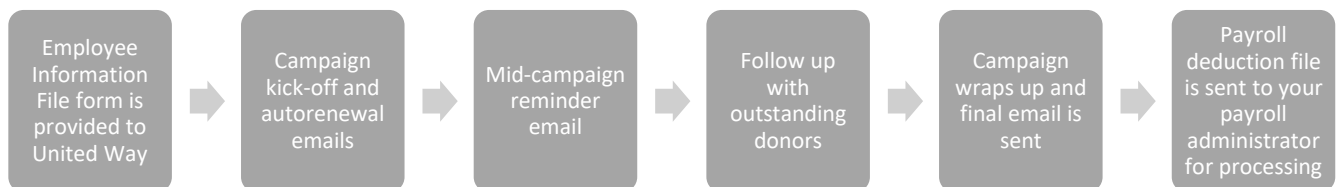
### Benefits

- Eliminates the need for paper pledge forms, saving time, paper, errors and the environment
- User-friendly experience for donors and administrators
- Increases efficiency of campaign administration
- Live campaign updates and reporting
- Ability to send customized emails for your workplace

### Self-Registration

If you are unable to provide us with employee information, you can choose Self-Registration. We will provide you with a link to a registration page for your workplace that can be forwarded to employees at your organization. After creating an account, employees can log in to ePledge to make their donation.

## ePledge Campaign Timeline



## How do I start self-registration e-Pledge?

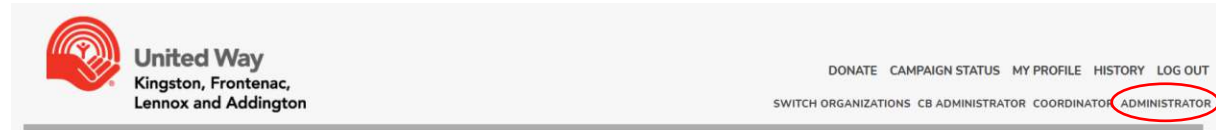
United Way staff will provide a custom registration URL to your workplace campaign coordinator. Once received, send the link out to all staff of your workplace. This will let each employee create a login tied to your workplace campaign, and then they can set their donation amount.

During the campaign it is important to send out follow-up emails. Personalize these emails where possible to generate the most impact.

Create last call emails, thank you or wrap up emails to communicate the progress of your workplace campaign, as well as when it concludes. Share the results generated by your campaign, either by sharing employee giving totals, special event totals or participation rates. Including supportive messaging from senior leadership is often a welcomed addition.

## Administrator Access

An individual with the “ePledge Administrator” role in Andar has access to a variety of campaign information directly through ePledge. Individuals with administrator access can switch to the ePledge Administrator portal by clicking the Administrator button on the top-righthand corner of the screen.

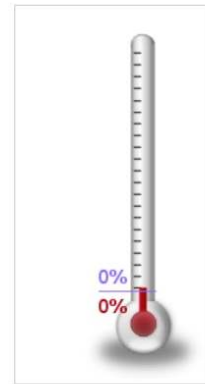


## Campaign Reporting

The campaign summary screen allows you to view up-to-date information on your campaign, including the campaign total, the number of donors, participation rates, and more.

### CAMPAIGN STATUS

Here is up to date information on how your workplace campaign is progressing.



Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
Test Workplace	Empl	\$0.00	\$0.00	0	0	0%	0	0%	\$0.00	\$0.00

The reports feature of ePledge allows you to view detailed reports on your campaigns progress. Each report has a variety of options available that allow you to filter the data, as well as choose whether to download in PDF or Spreadsheet format.

After submitting a report, your data will be available in the “My Outputs” menu.

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CAMPAIGN STATUS REPORTS TRANSACTIONS DOCUMENTS LOG OUT  
SWITCH ORGANIZATIONS DONOR CB ADMINISTRATOR COORDINATOR

## MY OUTPUTS

In order to download a report right click the link and save the report on your computer.

Refresh

Show Outstanding

<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	493368	Response Report	<a href="#">Test Workplace - Pledge Response Report</a>	05/26/2021 10:45:12 AM	1	4.7 KB	pdf	Ready	

### Response

The Response Report will list all employees at your organization who have responded. This includes all donors, and individuals who have selected “I do not wish to give” on ePledge.

### No Response

The Response Report will list all employees at your organization who have not responded.

### Summary One

This report will display a summary of the campaign, including the total campaign amount, number of donors, and more. You may choose to change the Year of the report to view a summary of a previous year.

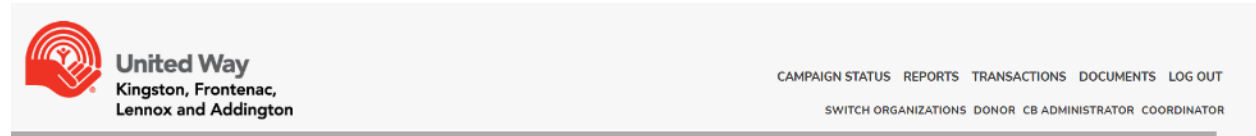
### Transaction Report

This report lists all donations for the given year.

## Transactions

The Transactions menu allows you to search for transactions made by employees at your organization.

After searching for an employee, any donations made by that individual in the given year will be listed. By selecting the options to the left of their name, you can choose to add a pledge on their behalf, send them an email, or update their employee information.



### TRANSACTIONS LIST

**TEST WORKPLACE - COMPANY**

[open all](#) [close all](#)

- Test Workplace
  - test subsidiary

Campaign Year:

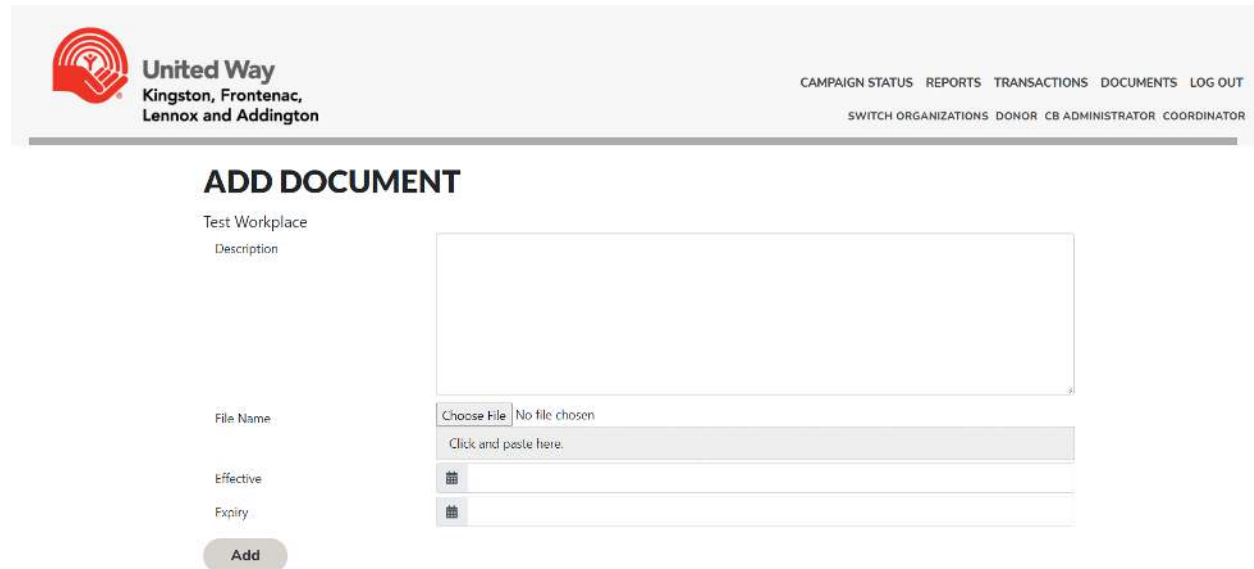
Search for employee:  [🔍](#)

[Add](#)

	Name	Pledge	Payment	Pledge Type	Payment Type	Received	e-Payment Verification	
\$	<a href="#">✉</a> <a href="#">👤</a> e Pledge, Test	N/R	\$0.00					

## Documents

The Documents menu can be used to securely upload documents for United Way to access. It can also be used for you to access documents that we upload, such as your payroll deduction file at the end of the campaign.



The screenshot shows the 'ADD DOCUMENT' form in the United Way system. The header includes the United Way logo and the text 'United Way Kingston, Frontenac, Lennox and Addington'. The navigation menu contains 'CAMPAIGN STATUS', 'REPORTS', 'TRANSACTIONS', 'DOCUMENTS', 'LOG OUT', 'SWITCH ORGANIZATIONS', 'DONOR', 'CB ADMINISTRATOR', and 'COORDINATOR'. The form fields are: 'Test Workplace' (text), 'Description' (text area), 'File Name' (file selection), 'Effective' (calendar), and 'Expiry' (calendar). An 'Add' button is at the bottom.

**ADD DOCUMENT**

Test Workplace  
Description

File Name  
Choose File No file chosen  
Click and paste here.

Effective  
Expiry

Add

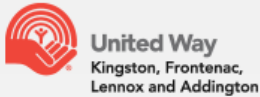
## Coordinator Access

ePledge Coordinators are able to view high-level information on the campaign rather than individual donor data. Coordinators have access to the Campaign Summary menu, the Summary report, and the Documents menu same as ePledge Administrators.

# Special Events

Funds for special events can be transmitted to United Way through the following page:<http://andarweb.unitedwaykfla.ca/specialevents>

Payments can be made on this page through Credit Card, Paypal, and eTransfer. You will be asked to provide your contact information, the name of your workplace, and a description of the event. Once processed, these funds will be recorded as Special Events donations in your workplace campaign.



## United Way KFLA - Special Events

Please use this page to transmit special events donations on behalf of your workplace. If you encounter any technical difficulties, please contact [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca).


\* Individual Work Email



\* Name of your workplace:

\* Description of Event:

Items marked with an asterisk(\*) are required

Please select your payment type:

  
Credit Card - One-Time Donation

  
 The safer, easier way to pay.



## Donor Experience

Once employees log into ePledge, they will be taken directly to the ePledge donation page.

From here, they can select their donation type: Payroll Deduction, Credit Card, e-Transfer, Paypal, or Securities. They can also indicate that they do not wish to give this year.

The screenshot shows the United Way logo and navigation links (DONATE, CAMPAIGN STATUS, MY PROFILE, HISTORY, LOG OUT) at the top. Below the header, the main heading is "PLEASE SELECT YOUR DONATION TYPE". There are six buttons arranged in two rows. The first row contains: "Payroll Deduction" (with a document icon), "Credit Card" (with a card icon), "e-Transfer" (with a transfer icon), and "Paypal Express Checkout" (with the PayPal logo). The second row contains: "Securities" (with a bar chart icon) and "I choose not to give this year." (with a gift icon and a prohibition sign).

After selecting their pledge type, the donor can enter how much they wish to donate.





The screenshot shows a form with the following fields and options:

- Deduction Start Date:** A text box containing "Jan. 01, 2022".
- Deduction Per Pay:** A text box containing "\$4.62".
- Pay Periods Per Year:** A dropdown menu with "26" selected.
- Number Of Deductions To Make:** A text box containing "26".
- Total Annual Pledge:** A row of buttons: "\$120" (highlighted in red), "\$240", "\$360", "\$500", "\$1200", and "Other". Below these buttons is a text box containing "120.00".

## Designations

The Designations section allows donors to designate their gift to one or more registered Canadian charities, or a United Way KFLA impact area.

### UNITED WAY KFLA IMPACT AREAS

Name	Designation Amount
United Way COVID-19 Response Fund	<input type="text"/>
 Building Strong and Healthy Communities	<input type="text"/>
Food Security	<input type="text"/>
 Helping Kids Be All They Can Be	<input type="text"/>
 Moving People From Poverty to Possibility	<input type="text"/>
 Youth Homelessness	<input type="text"/>

### REGISTERED CANADIAN CHARITIES


Keyword

Donors can search through our database to find the charity that they wish to designate their gift to. After finding the charity they're looking for, selecting the **+** button will allow them to indicate how much of their gift they would like to designate to that charity. This process can be repeated for multiple designations if desired.


### REGISTERED CANADIAN CHARITIES

Keyword

Result: (- of )

Name	Book #	
Kingston Humane Society	135235	

Result: (- of )



If they do not find the charity they're looking for in our database, donors can use the "Write In" option to provide us with information on the charity that they are designating their gift to.

ADD WRITE-IN

Amount	\$40.00
Agency Name	Brant County SPCA
Address	539 Mohawk St
City	Brantford
Province	ON
Postal Code	N3T 5M8
Country	Canada
*Charitable Registration Number Required in order to properly process your designation. To search for registered Canadian Charities visit <a href="https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch">https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyAdvncdSrch</a>	89836 9319 RR0001

Add



A minimum gift of \$20 (per charity) is required for this option, and a 10% processing fee will apply, except on designations to other United Ways.

Designation payments are paid out in installments to charities twice a year, and designated charities are paid only the funds that have been received by United Way KFLA at the time of the payment.

## Post Campaign

In early December, an email will be sent to the payroll administrator at your workplace with a link to log in to ePledge and access your workplace's payroll deduction file.

This file lists all employees who pledged via payroll deductions, how much they donated in total, and how much to deduct per pay period.

To access the file, the payroll administrator simply needs to click the link in the email to be logged into ePledge. They can then access the Documents menu and download the file for upload into your organization's payroll system.

## Frequently Asked Questions

### A new employee joined after we sent the employee file, can they still donate online?

Yes. To have an employee registered for ePledge, simply contact [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca) with their name and email address. The employee will be registered for ePledge and sent the link to log in and make their donation.


### A donor would like to change or cancel their pledge, how can they do this?

To change a payroll pledge, donors can simply log back into ePledge and they will be given the option to update an pledge amount or cancel their payroll donation. For all other pledge types, donors can contact [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca) to request a change or cancellation.


### An employee lost their username/password, how do I help them log in?

Users who forget their password can navigate to: <https://andarweb.unitedwaykfla.ca/ForgotPassword> and select “Forgot User ID or Password”. After entering their work email address, users will be sent an email with instructions on how to log in and reset their password.

### An employee donated online and can't find their confirmation email, what should I do?

Users with ePledge Administrator access can re-send the confirmation email to employees at their organization by using the “Transactions” menu. After searching for the employee, selecting the envelope button  on the right side of the screen will allow you to re-send the confirmation email to the employee. You can also choose to contact [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca) with the donor's information. The confirmation email will be re-sent to the donor as soon as possible.

### An employee didn't receive a receipt for their donation. Who do I contact to have this sent to them?

Users with ePledge Administrator access can re-send the donation receipt to employees at their organization by using the “Transactions” menu. After searching for the employee, selecting the receipt button  on the right side of the screen will allow you to re-send the receipt to the employee. You can also choose to contact [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca) with the donor's information. The receipt will be re-sent to the donor as soon as possible. Please note that donors who pledge via payroll will not receive a receipt from United Way, as their donation amount will appear in box 46 on their T4 statement for tax purposes.

## What steps do you take to ensure employee data is kept safe and secure?

We are committed to protecting the privacy of all individuals. We maintain appropriate technical and organizational safeguards to protect donor information against loss, theft, unauthorized access, disclosure, copying, use or modification.

Access to your personal information is restricted to UWKFLA employees, agents and authorized service providers who need the information to fulfill the purpose for which the information was collected. UWKFLA will protect your personal information by safeguards that are appropriate to the sensitivity of that information and the format of the information, whether electronic or physical.

Our procedures include physical security measures, organizational measures including security clearances and limiting access on a “need-to-know” basis, and technological measures such as the use of passwords and encryption. When it comes to the handling of electronic records, UWKFLA adheres to Payment Card Industry Data Security Standards (PCI DSS).

For more information on United Way KFL&A’s privacy policy visit <https://www.unitedwaykfla.ca/privacy-policy/>

**Thank You**   
for your local love

[www.unitedwaykfla.ca](http://www.unitedwaykfla.ca)



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