

# LOCAL PEOPLE DOING LOCAL GOOD



**United Way**  
Alberta Capital Region

## UnitedWay@work User Guide

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# For Users

## Donate Using Your Lite Campaign Link

1. Click on your provided donation link.
2. Click "Donate Now."  
If your organization has locations outside of the Edmonton area, select the region you are located in. This will ensure your donation will go automatically to your local United Way.
3. Select payment method.
4. Enter in your donation amount or select pre-set donation amounts.  
If you would like to designate, please select "Additional Giving Options." You can choose to donate to any Canadian registered charity by selecting them through the search option or entering them in manually. You can designate to multiple locations if you choose.
5. Click "Continue."
6. Enter in your address details and credit card details (if applicable). Please ensure this is also your billing address if paying by credit card.  
You are also given the option to select a recognition name if you are giving at the Leaders of the Way level (over \$1,200). You can also mark your donation as anonymous.
7. Click "Continue."
8. You will now be provided with a summary screen, please review it to ensure all your information is correct including designation details.  
You can also mark yourself as anonymous to any third-party charities you may have designated to. You may also have your confirmation email sent to more than one email address.
9. Click "Continue."
10. You will now reach the thank you screen, this will confirm your donation has been successfully processed.
11. You will receive a confirmation email with your donation details included.

**Tax Receipt Information:** If you made a one-time credit card donation, you will receive your electronic tax receipt within five to seven business days. All other types of donations (including post-dated credit card donations) will be receipted in February of the following year as part of a consolidated receipt. If you have any questions regarding receipting, please email [servicehub@myunitedway.ca](mailto:servicehub@myunitedway.ca).

**Changes:** If you would like to change your donation amount or designations after making a successful donation, please contact [servicehub@myunitedway.ca](mailto:servicehub@myunitedway.ca) and include the confirmation email you received.

**Technical Issues:** If you encounter issues with the link or throughout the donation process, please email [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca).

## Designating Your Gift

You may donate to United Way funded partners and other registered Canadian charities directly through the UnitedWay@work system.

Click "Additional Giving Options."

My Campaign

My Gift

[donate](#) [confirm](#) [thank you](#)

Thank you for your previous gift of \$1,000.00.  
Yes, I want to break the cycle of poverty!

I would like to donate by 

Credit Card

☐ \$1,150.00 ☐ \$1,300.00 ☒ \$1,450.00

or, enter another amount below

Total donation

Amount

Installment(s)

Effective

\$ 1,450.00

= \$ 1,450.00

x 1

3/26/2015

**Additional Giving Options:**  
[+ Click here to designate to United Way Community Partners and/or any registered Canadian charity.](#)

**Donation Summary**

- Community Impact Fund ... \$1,450.00

Enter selected charity.

United Way

DESIGNATE WITHIN UNITED WAY OF THE ALBERTA CAPITAL REGION

DESIGNATE TO ANOTHER UNITED WAY OR CANADIAN CHARITY

CREATING PATHWAYS OUT OF POVERTY \$ 1,740.18

- Education - Help children achieve success in school. \$ 0.00
- Income - Help families and individuals achieve financial stability and independence \$ 0.00
- Wellness - Help strengthen the well-being and safety of individuals, families and communities \$ 0.00

**SEARCH INSTRUCTIONS:** Enter a name, keyword, or full CRA number below to find a registered Canadian charity. United Way retains 10% of the designated gift to recover the costs associated with this service. In the case of one-time cheque, or a Gift of Securities contributions from individuals, a maximum designation fee of \$100 per donor will be withheld. Thank You.

Search

Enter the designated amount.

Charity not found? [Enter charity details](#)

Charity Name	City	Amount
Heart & Stroke Foundation of Canada	Ottawa	0.00
Heart & Stroke Foundation of Canada - BC & Yukon chapter	Ottawa	0.00

Click "Add" next to the designation amount. You must do this step, or it will not save your designation amount.

**DESIGNATE TO ANOTHER UNITED WAY OR CANADIAN CHARITY**

**SEARCH INSTRUCTIONS:** Enter a name, keyword, or full CRA number below to find a registered Canadian charity. United Way retains 10% of the designated gift to recover the costs associated with this service. In the case of one-time cheque, or a Gift of Securities contributions from individuals, a maximum designation fee of \$100 per donor will be withheld. Thank You.

Charity not found? [Enter charity details](#)

Charity Name	City	Amount
Heart & Stroke Foundation of Canada	Ottawa	25.00 <input type="button" value="Add"/>
Heart & Stroke Foundation of Canada - BC & Yukon chapter	Ottawa	0.00

Once your designations their amounts are entered, click "Continue" to finish.

☐ I wish to remain anonymous to the above non-United Way charity / charities.

The designations will appear in your summary.

My Campaign

My Gift

▶ donate ▶ confirm ▶ thank you

Thank you for your previous gift of \$1,000.00.

Yes, I want to break the cycle of poverty!

I would like to donate by

☐ \$1,150.00
 ☒ \$1,300.00
 ☐ \$1,450.00

or, enter another amount below

Total donation	Amount	Installment(s)	Effective
\$ 1,300.00	= \$ 1,300.00	x 1	3/26/2015

**Additional Giving Options:**  
 + [Click here to designate to United Way Community Partners and/or any registered Canadian charity.](#)

**Donation Summary**

- Community Impact Fund ... \$1,275.00
- Heart & Stroke Foundation of Canada ... \$25.00

# For ECCs

## Pledge Drive Messaging

Messaging is key during the pledge drive. This is what will entice people to make an informed decision to support or not support United Way and your campaign. The welcome email will go to all staff when your campaign launches. Subsequent reminder emails will only go to those who haven't made a decision to give.

Your United Way representative must receive your email schedule and content two weeks prior to your pledge drive launch date. This will ensure there is sufficient time to review the messaging, and upload onto the system for emails to be sent to employees on the dates indicated. If messaging is received less than two weeks prior to your pledge drive launch date, this may delay the email schedule and delivery.

Typically, the timeline for the focused pledge drive is two to three weeks in length, with three to five emails during that timeframe. There is the option for additional messaging to be sent out after the focused pledge drive if you choose.

## Email Schedule

Once you have created the schedule for your messaging, please advise United Way of the following:

### Welcome Email

Date

Time: morning or afternoon (United Way cannot guarantee specific times)

Subject Line: keep the subject line short yet informative to entice people to open the email

Sender Name: the email is sent from our server so the senders email address won't be attached; however, their name can be displayed. Obtain approval from the individual listed as the sender before submitting your messaging for use.

### Reminder Email(s)

Date

Time: morning or afternoon (United Way cannot guarantee specific times)

Subject Line

Sender Name

## Email Content

While there is a lot of information that can be shared to help inform employees about United Way, your campaign, and the importance of their contribution, short messages that hit home tend to result in higher participation.

**Short messaging:** be concise, explaining why they are getting the message and how they can help. Try to refrain from adding campaign specific messaging that should go to all employees as after the welcome email, only those that have not made a decision will receive the reminders.

**Use pictures or videos:** Photos, videos, and impact stories add meaning to the messaging and demonstrate need in our community.

**Use stats or impact statements:** Reflect on how last year's fundraiser made an impact in the community or include an example of how a specific donation can make a difference.

**Add an incentive:** Incentives can entice people to read the message and follow through with the donation. "If you make a decision to either donate now or not this year by [date], you will be entered into a draw for [prize]."

Work with your United Way Representative to draft your messaging. They will have access to default messaging, will be able to help with wording, and can provide direction should you wish to highlight a specific area, program, or partner of United Way. They will also be able to work with you on national messaging to ensure that emails going to staff outside of the Alberta Capital Region reflect their home region.

## Resending Emails to an Individual

There may be times that you need to resend emails to employees. This can be done through the Workplace Administrator dashboard.

### Sending an email without changes

This method will resend the email exactly as it was when originally sent. Any changes made to the content of the email or the employee's email address will not be reflected.

The screenshot shows the 'Campaign Management' section of the UnitedWay@work Workplace Administrator dashboard. The left sidebar contains a navigation menu with options like 'Campaign Dashboard', 'Email Wizard', 'General Setup', 'Quick Campaign Setup', 'Employee Management', '3. Select Employee', 'Add Employee', 'Delete Test Employees', 'Campaigner Management', and 'Admin Management'. The main content area is titled 'Campaign: Test Demo Campaign' and 'Employee Search'. It includes a search form with fields for 'First Name', 'Last Name', 'Email address', and 'Employee ID'. A 'Search' button is at the bottom of the form. The user is logged in as 'Test WPA'.

1. Login as a UnitedWay@work admin with email privileges
2. Click "Campaign Management" on the top left
3. Click "Employee Management" on the left-hand side
4. Search for the individual by Name, Email, or Employee ID

The screenshot shows the 'Select Employee' page in the UnitedWay@work Workplace Administrator dashboard. It displays a table of available employees. The table has columns for 'Name', 'Email Address', 'Employee Number', 'Enabled / Not Current', and 'Target / Prospect'. The first row shows 'Account Test' with email 'uwatwork@myunitedway.ca' and employee number '123123'. The user is logged in as 'Test WPA'.

Name	Email Address	Employee Number	Enabled / Not Current	Target / Prospect
Account Test	uwatwork@myunitedway.ca	123123	Enabled	Non-Leader

5. Click on the individual's name in the search results.

Here you will have a list of all the emails sent to the individual.

The screenshot shows the 'Employee Dashboard : Test Account' in the UnitedWay@work Workplace Administrator dashboard. It displays various details about the employee, including 'Employee Details', 'Campaign Information', 'Email Log', and 'Current Year Donations'. The 'Email Log' section shows a list of emails sent to the employee, with a 'Resend' link next to each entry. The user is logged in as 'Test WPA'.

Name	Email Address	Employee Number	Enabled / Not Current	Target / Prospect
Account Test	uwatwork@myunitedway.ca	123123	Enabled	Non-Leader

6. Click on the "resend" link beside the email you wish to resend.

### Sending an email with changes

To send an updated Welcome email, or to resend a Welcome email to individuals whose email addresses or other information have been updated, follow steps 1 through 5 above, then:

Click “Employee Details”

<b>Employee Details</b>		<b>7.</b>	<b>Employee Details</b>
<b>Name</b>	Test Account	<b>Enable</b>	Yes
<b>Email address</b>	uwatwork@myunitedway.ca	<b>Include in Leadership Campaign</b>	No
<b>Employee ID</b>	123123		
<b>UW ID</b>			
<b>United Way Leader</b>	Yes		

Update applicable information.

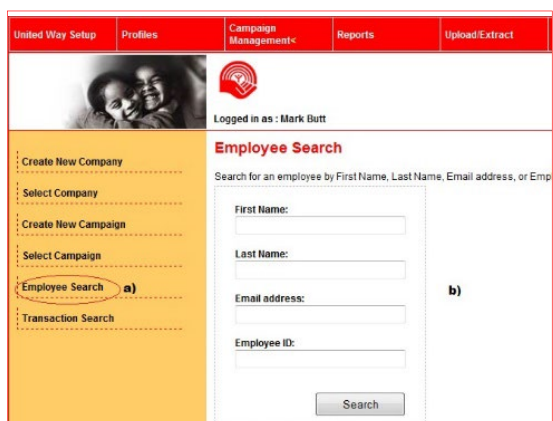
Click the “Save and Send Welcome Email” button.

## Looking up Transactions in UnitedWay@work

When an individual decides to donate through the UnitedWay@work system, they will be given the option to designate their donations. UnitedWay@work administrators can look up each transaction and determine what designation(s) are associated.

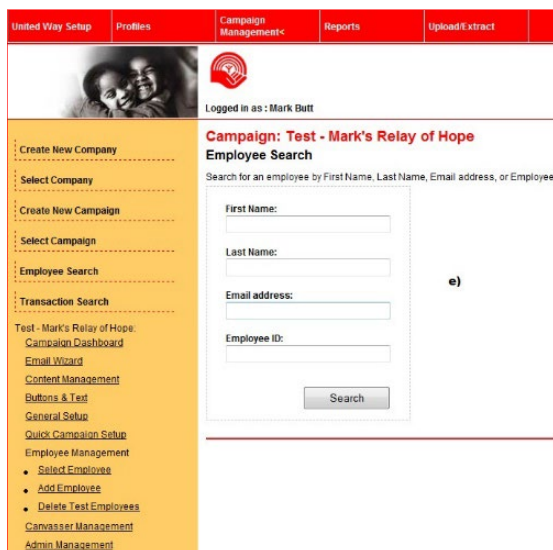
Login as a UnitedWay@work admin with financial privileges.  
Click "Campaign Management" in the top left.

You have the option to search for an employee through All Campaigns or within a Specific Campaign. If you wish to see all transactions associated with an employee, search through All Campaigns. If you wish to see a campaign specific transaction, search through a Specific Campaign.



### 1. All Campaigns

- Click "Employee Search" on the left-hand side.
- Search for the individual by their name, email, or employee ID.



### 2. Specific Campaign

- Click "Select Campaign" on the left-hand side.
- Search by company and/or campaign name.
- Click the appropriate campaign name.
- Under Campaign Name on the left-hand side, click "Employee Management."
- Search for the individual by their name, email, or employee ID.

### 3. Employee Dashboard

United Way Setup | Profiles | Campaign Management | Reports | Upload/Extract

Logged in as : Mark Butt

**Campaign: Test - Mark's Relay of Hope**

**Select Employee**

Found 1 available employees:

Select the underlined name of the employee below to view their record. This will allow you to data enter a paper

Name	Email Address	Employee Number	En
<u>Doe, Jane</u>	mbutt@myunitedway.ca	107	

Displaying records 1 - 1

[+ New Search](#)

Under "Select Employee," click the correct search result based on the criteria entered.

**Note:** Your results screen may look slightly different when searching through the All Campaigns method.

**Employee Dashboard : Jane Doe**

To change any employee information, click the hyperlinks on the grey headers (Employee Details, View/Edit). To data enter a paper pledge for this employee, select 'Make a New Donation' below or 'Data Entry' from the Left (under their bolded name).

Click on 'Edit' (or 'Edit Donations' from the Left) to adjust a donation. If a link to edit does not appear, United Way has extracted the information and you will need to follow up with your United Way contact.

Employee Details		Employee Details						
Name	Jane Doe	Enable	Yes					
Email Address	mbutt@myunitedway.ca	Include in Leadership Campaign	No					
Employee ID	107							
UW ID	8							
United Way Leader	No							
Campaign Information		View/Edit Email Log						
Workplace ID	Test1 Company - 50 Email	Date Sent	5/28/2015 3:29:00 PM					
Canvasser Group	Butt Mark Thank You	Sender Name	Adam Medvedev					
Pay Period Group	26 Non-Flexible							
Campaign Group:		United Way Use Only						
Level 1	Head Office	Last Year's Donations:	\$100.00					
Level 2	Engineering							
Level 3	Civil COMMENTS: There are 0 comment(s) posted.							
Final Day to Give Online	12/31/2016							
Current Year Donations		Make New Donation						
Status:	4)	Donated	\$170.04					
Total Donation:								
Transaction(s):								
Number	Amount	Status	Date	Source	CreatedBy	UpdatedBy	UpdatedDate	Options
17575	\$5.54 x 26 = \$170.04	Uploaded	05/28/2015	UW Entry - Payroll Deductions - Begins Jan. 2015	Mark Butt	Mark Butt	05/28/2015	Edit / View

Upon clicking the employee's name, you will be brought to an employee dashboard that provides a glimpse of all employee data stored in @Work.

Under the "Current Year Donations" header a list of transactions for the selected employee will appear.

**Make New Donation**

**Donated**

**\$170.04**

UpdatedDate	Options
05/28/2015	Edit / View

To view designation details, select "View" under "Current Year Donations" header in the "Options" column.

Gift History - Windows Internet Explorer

https://secure.uwawork.com/UWACR\_40/admin/DisplayDesignationsOfDonation.asp?iDonationID=17

**Campaign: Test - Mark's Relay of Hope**

**Jane Doe**

Transaction Number: 17575

Designation Details

Designation Name	CatalogType Code	Designation Amount
United Way of the Alberta Capital Region - Creating Pathways Out of Poverty	CF	\$0.04
Education - Help children achieve success in school	SA	\$50.00
Income - Help families and individuals achieve financial stability and independence	SA	\$20.00
Canadian Cancer Society - Edmonton & Area	CAT1	\$50.00
Edmonton Meals on Wheels	CAT1	\$50.00

[Edit](#) [Close](#)

This will display a breakdown of designations associated with that particular transaction.

## Inputting Cheque Donations in UnitedWay@work

When an individual decides to donate via cheque through the UnitedWay@work system during a workplace campaign, they will be instructed to take their donations to a specified United Way workplace admin. But what does that WPA do once they have received the donation, how do you see who has chosen to donate via cheque, and how do you see what is outstanding?

**Campaign: 2011 Test Campaign**  
**Workplace Received Checklist**

Select Donor Search

To find the record(s) for employees whose payments you have in hand (E.g. all cheques, paper pledge cards for data entered donations) either enter their name or select 'unsent transactions' below. This will take you to the checklist.

Search for a Donor by Employee Number or by the First and Last Name:

Employee Number:  
First Name:  
Last Name:

Search

[all transactions](#) [sent transactions](#) [unsent transactions](#)

1. Login as a UnitedWay@work admin with financial privileges.
2. Click on "Campaign Management" on the top left side.
3. Click on "General Setup" on the left-hand side.
4. Click on "Workplace Received Checklist" on the left-hand side.

This will take you to an employee search. If you have received a payment from an employee, you can search for them here.

Below the search box, there are three links:

- "all transactions" will list of all cheque donations made during the campaign;
- "sent transactions" will list all cheque donations that have been marked as received;
- "unsent transactions" will list all outstanding donations.

**Campaign: 2011 Test Campaign**  
**Workplace Received Checklist**

Check the box in the 'Received' column for items you have in hand and change the received date if necessary. To save changes, press 'submit' before proceeding to next page of donors. Marking items as 'Received' will automatically update the report called 'Cash/Cheque/Credit Card Received'.

Remember to run this report and submit it inside your campaign envelope.

3 Transactions Available:

Donor's Name	Employee Number	Payment Method	Donation Amount	Donation Date	Received	Date (mm/dd/yyyy)
C	12345	One Time Credit Card (Credit Card)	1,000.00	04/15/2011	<input checked="" type="checkbox"/>	04/15/2011
H	4445556	One Time Cheque (Cheque)	\$365.00	04/15/2011	<input type="checkbox"/>	04/08/2011
K	1456458	One Time Cash (Cash)	\$500.00	04/15/2011	<input checked="" type="checkbox"/>	04/15/2011

[Check All](#) [Un-Check All](#)

3.

Once you have received the cheque and have found the employee in the Workplace Received Checklist:

1. Verify the amount received and payment method against the record.
2. When everything matches, check the box under "Received."
3. Click "Submit."

**Note:** cheque donations made through UnitedWay@work do not require a Paper Pledge Form.

Include all cheques in a UnitedWay@work Employee Campaign Revenue (ECR) envelope. Run and print a "Follow Up Report" (click on "Reports" at the top, click on "Follow Up Report", and then the print icon) and include it with the donations in the envelope.

## Using the Campaign Dollar Adjustments Function

The Campaign Dollar Adjustment is used when you receive donations from Special Events and Paper Pledge Forms that you want tracked in UnitedWay@work and through your campaign thermometer.

The screenshot shows the UnitedWay@work Campaign Management interface. The top navigation bar includes 'Campaign Management' and 'Reports'. The left sidebar lists various campaign management options, with 'Campaign Dollar Adjustment' highlighted under the 'General Setup' section. The main content area is titled 'Campaign: 2011 Test Campaign Campaign Dollar Adjustment'. It includes a table of records with columns for Amount, Description, Type, and Time. The table shows three records: a \$2,210.00 Silent Auction (ADDED), a \$500.00 Be Seen in Jeans (ADDED), and a \$100.00 Bake Sale (DELETED). Below the table, there is a form to 'Adjust Campaign Dollars' with fields for Description and Amount, and an 'Add' button.

Amount	Description	Type	Time
\$2,210.00	Silent Auction	ADDED	4/15/2011 1:15:24 PM
\$500.00	Be Seen in Jeans	ADDED	4/21/2011 1:31:12 PM
\$100.00	Bake Sale	DELETED	4/21/2011 1:31:28 PM

### To Add Donations:

1. Login as a UnitedWay@work admin with financial privileges
2. Click "Campaign Management" in the top left
3. Click "General Setup" on the left-hand side
4. Click "Campaign Dollar Adjustment" under "General Setup" on the left
5. Enter a detailed description, including the date, to easily distinguish each item. e.g., 'Be seen in Jeans, Sept 21, 2022'
6. Enter the total amount collected
7. Click "Add"

### To Remove Donations:

1. Follow Steps 1-4 above
2. Find the donation you wish to remove
3. Click the "delete" link beside the donation
4. The donation will now show as "DELETED" - it will not show up in any reporting and will not influence your campaign thermometer

**Note:** Once a donation has been entered using the Campaign Dollar Adjustment, it cannot be edited. If you need to edit a donation entered through the Campaign Dollar Adjustment, follow the steps for Removing then Adding Donations, above.

## Common Reports for ECCs

### Daily Status Report

The Daily Status Report gives a one-line summary on how many donations took place in one day. The dollars reported in this report are not on an individual level. There is also a summary line for the entire campaign that includes average donations, dollars to goal, last year's undecided amounts, and participation percentages.

Fields included in the Daily Status Report are:

- Date
- Number of Donations
- Total Donation
- Offline Dollars
- Number of Leaders
- Leadership Amount

### Decided / Undecided Financial Data Export (Financial and Non-Financial)

This report is commonly used for Early Bird draws. These reports deliver the donation status for all employees, either with financial data or without financial data.

Fields included in the Decided / Undecided reports are:

- Last Name
- First Name
- Employee ID (if uploaded)
- Decision Date
- Decision Time
- Decision Status
- Canvasser Last Name
- Canvasser First Name
- Group Level (1-6)
- Donation Total (in the case of the Financial Data Export report)

### Employee Status (Modified Details) Report and Employee Status Report

The Employee Status Reports present the donation status of each employee in the campaign. The Modified Details report does not contain financial details.

Fields included in the Employee Status (Modified Details) Report are:

- Last Name
- First Name
- Decision Date
- Decision Status
- Leader Target Status
- Canvasser Last Name

- Canvasser First Name
- Group Level (up to 6)

Fields included in the Employee Status Report are:

- Last Name
- First Name
- Employee ID (if uploaded)
- External Identifier (UW)
- Decision Date
- Last Updated By
- Decision Status
- Leader Target Status
- Leader This Year
- Donation Last Year
- Donation This Year
- Opted Out
- Not Ready Status
- Canvasser Last Name
- Canvasser First Name
- Group Level (1 to 6).

### Follow Up Report

The Follow Up Report gives a list of employees who have chosen to donate via cheque or post-dated cheque that have not yet been collected by the workplace admins or marked as received in UnitedWay@work. This report requires financial permissions.

Fields included in the Follow Up Report are:

- Last Name
- First Name
- Employee ID (if uploaded)
- External ID (UW)
- Work Email
- Workplace Name
- Donation Amount
- Donation Date
- Donation Time
- Payment Type
- Received Date
- Credit Card (for PPFs manually entered)
- Envelope Number
- Extract Date
- Received (Y/N)

## UnitedWay@work Closing Procedures

Contact your United Way Representative to begin the process of creating the Employee Campaign Revenue (ECR) envelope. Your United Way Representative will bring the required information to your workplace to create and balance the envelope.

### Cheque and Data Entered Credit Cards

Run the Follow Up Report. Alternatively, you can filter 'unsent' transactions within the 'Workplace Received Checklist.'

Review to see if there are any outstanding cheques. Follow up with employee appropriately.

For all cheques collected, as well as credit cards that have been data entered, ensure that they are marked as received in the Workplace Received Checklist:

1. Click "General Setup."
2. Click "Workplace Received Checklist."
3. Search for the employee or select all transactions or unsent transactions.
4. Mark received in the employees' check box.

**Note:** For data entered credit cards originating from paper pledge forms, United Way must receive proof of the pledge card including signature. Submit either the original form or a scanned copy, both of which will require the signature.

Once all cheque pledges have been collected, run the Follow Up Report. Be sure to only include those cheque donations that are included within the ECR envelope you are creating. Print two copies. Fill out a ECR envelope, including the Follow Up Report that highlights the cheque donations that are included in the envelope.

### Payroll

Contact your United Way Representative to produce an official report for all payroll pledges received online and on paper pledge forms.

While UnitedWay@work will also contain a payroll deductions report, it is not considered official in the event paper pledge forms were not data entered.

Your United Way Representative can supply an official report to be submitted to your payroll department.

## UnitedWay@work Frequently Asked Questions

### Who can I contact for assistance?

If you are experiencing technical issues with UnitedWay@work, please email [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca).

If you need assistance with donating or have other queries, please email [servicehub@myunitedway.ca](mailto:servicehub@myunitedway.ca).

### What is UnitedWay@work?

UnitedWay@work is an online pledge and campaign administration tool specifically designed to enhance workplace fundraising. Through the UnitedWay@work system, employees will receive an email with a link to a personalized website, co-branded by your organization and United Way. The website offers a wealth of information to the user and provides a quick and easy way to donate.

### What campaign management features will I have as an Employee Campaign Chair?

As the Employee Campaign Chair, you have a large role in the success of a UnitedWay@work campaign and will be given a range of tools to accomplish this. You will have control of campaign content, the list of employees to be solicited, and targeted email communications (kickoff messages, reminders, etc.).

Because the role of the Employee Campaign Chair is so important, one-on-one training and specialized materials will be offered. UnitedWay@work is easy to deploy and use.

### What are the technical requirements for using @work?

Like any transactional website, there are some basic technical requirements. As an ECC you will provide United Way with an IT contact that the United Way will work with to ensure your networks meets the minimum requirements and is configured correctly. A complete list of technical requirements is available from your United Way Representative.

### I'm concerned about security and privacy. How does United Way keep information secure?

United Way is committed to protecting private information and maintaining the confidentiality of personal information under our control. United Way has adopted the Canadian Standards Association Model Code ten principles for the protection of privacy, which can be viewed at <https://www.myunitedway.ca/about-us/privacy/>.

All transactions on the UnitedWay@work website are encrypted with SSL (secure socket layer) technology. Verisign, the leader in e-business security, provides our SSL certification. This is the industry standard for online banking and other e-commerce transactions. All donor information is stored on a secure server behind a firewall which is also fully PCI compliant.

The site is password-protected. Your employees choose their own passwords as they enter the application. Most employees interact with the system for just a few minutes. Should they wish to enter the application multiple times but forget their password, they can request for an email to be sent containing a personalized link to the password reset screen.

### How will United Way get work email addresses?

In order to send employees a personalized link, your workplace will provide United Way of the Alberta Capital Region with first name, last name, and work email address of all employees. This will enable the unique UnitedWay@work link to be sent to each individual employee.

If you do not wish to send personalized link, you may run a Lite campaign.

### How will paper pledge forms be handled?

If an employee chooses not to donate using the online tool and would instead like to give a contribution using a paper pledge form, you have the option of inputting the completed form into UnitedWay@work. This permits accurate tracking of paper and electronic pledges through the web-based self-service reporting feature.

### Can employees donate to another Canadian registered charity through UnitedWay@work?

Employees can designate their gift to another Canadian Registered Charity by clicking the “Additional Giving Options” option on the donate screen. The user can select more than one registered charity to attribute the donation to and/or split the gift between different United Way areas of focus. The user can also choose to give anonymously to these registered charities. For further details, see the [Designating Your Gift](#) section on page 3.

Mobile giving (e.g., accessing link on a mobile device) does not currently support additional giving options.

### How can employees donate publicly traded securities?

If they would like to donate publicly traded securities or want more information about this giving option, please contact United Way directly at (780) 990-1000. These donations cannot be processed through the UnitedWay@work system.

### How do they keep a record of their donation?

After they donate through the system, the user will be taken to a Thank You page that lists the details of your transaction. Click the “Print this Page” button to print a copy for a record. They will also receive an email and confirmation letter with the details of their donation.

### Do they get a tax receipt?

If an employee donated through payroll deduction, the donation will appear on their T4 slip. If they donated through a one-time credit card transaction, a receipt will be issued electronically.

For all other giving methods, a tax receipt will be sent from United Way through Canada Post.

### An employee did not receive a welcome and/or reminder email, how can one be sent?

Please ensure the employee checks their junk mail or spam folders for the messages as some individual user settings can misinterpret these emails. ECCs can resend emails by logging into UnitedWay@work as detailed in [Resending Emails to an Individual](#) on page 7. If the issue persists, please email [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca).

### How can an employee change their donation amount after donating?

Employees can adjust their donation amount or change their designations by emailing [servicehub@myunitedway.ca](mailto:servicehub@myunitedway.ca) so we may do a manual adjustment.

United Way will send a confirmation email with those changes. If they have already received an e-receipt for the original amount, that e-receipt will be voided and a new one issued as a replacement.

### Where can an employee go for more information about where their donation goes to and the programs/services it supports?

Please visit [myunitedway.ca](http://myunitedway.ca) to learn more about United Way of the Alberta Capital Region and its partner agencies.

### How can an employee opt out of campaign solicitations from United?

If an employee does not want to receive emails associated with the workplace campaign, please advise them to click their personalized link and select 'Not This Year' so they will no longer receive workplace campaign emails.

If they would like to opt out from all future United Way communications, including future workplace campaigns, please advise them to email [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca) and we will add them to a do not contact listing.