

# LOCAL PEOPLE DOING LOCAL GOOD



**United Way**  
Alberta Capital Region

## UnitedWay@work User Guide

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.

## Contents

For Users .....	2
Donate Using Your Campaign Welcome Email .....	2
Donate Using Your Lite Campaign Link .....	3
Designating Your Gift .....	4
For ECCs .....	6
Pledge Drive Messaging .....	6
Email Schedule .....	6
Email Content .....	7
Resending Emails to an Individual .....	8
Using the Campaign Dollar Adjustments Function .....	9
Common Reports for ECCs .....	10
Daily Status Report .....	10
Decided / Undecided Financial Data Export (Financial and Non-Financial) .....	10
Employee Status (Modified Details) Report and Employee Status Report .....	11
Follow Up Report .....	12
UnitedWay@work Closing Procedures .....	12
Payroll .....	12
UnitedWay@work Frequently Asked Questions .....	13

# For Users

## Donate Using Your Campaign Welcome Email

1. Within the welcome email, click on the provided donation link.
2. If this is the first time you have used UnitedWay@work, click on the link "First time user?" to setup your password.
3. Enter the email address that your welcome email was addressed to.
4. A system email will be sent to your email address with instructions on resetting your password.
5. Click on the link in the password reset email and follow the instructions.
6. Once you have successfully reset your password, use your email address and new password to log into the UnitedWay@work platform by clicking on your provided donation link.
- 7.
8. 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.
9. Select payment method.
10. Enter in your donation amount or select pre-set donation amounts.  
If you would like to designate, please select "Designate to Other Canadian Charities." You can choose to donate to any Canadian registered charity by selecting them through the search option or entering them in manually by searching for United Way of The Alberta Capital Region and adding a Note to indicate your preferred charity. You can designate to multiple charities if you choose.
11. Click "Next."
12. 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.
13. Click "Next."
14. You will now be provided with a confirmation screen, please review 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.
15. Click "Submit."
16. You will now reach the thank you screen. This confirms your donation has been successfully processed.
17. You will receive a confirmation email with your donation details included.

## 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 "Designate to Other Canadian Charities." You can choose to donate to any Canadian registered charity by selecting them through the search option or entering them in manually by searching for United Way of The Alberta Capital Region and adding a Note to indicate your preferred charity. You can designate to multiple charities if you choose.
5. Click "Next."
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 "Next."
8. You will now be provided with a confirmation screen, please review 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 "Submit."
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.

United Way  
Alberta Capital Region

1 Donate 2 Designate (Optional) 3 Information 4 Confirm

I want to support United Way with gift of:

I would like to donate by \*

☐ \$365.00 ☐ \$750.00 ☐ \$1,000.00

Total Donation \*

\$ 0.00

United Way National Campaign: \$0.00

Next Designate to Other Canadian Charities (Optional)

1. Click "Designate to Other Canadian Charities."

United Way  
Alberta Capital Region

1 Donate 2 Designate (Optional) 3 Information 4 Confirm

Your total gift to United Way National Campaign: \$1,000.00

Your Donation: \$1,000.00

If you would like to be a part of creating systemic change where you live, we hope you'll make a gift that stays with United Way. By investing directly in our network of agencies, you will ensure people in our community continue to receive the support they rely on. Donors will be publicly recognized according to their local United Way's guidelines and may only be publicly recognized for funds invested in our work.

Donors may designate a portion of their gift to other charities in addition to their support of United Way, for a fee of \$25 per organisation. The fee does not apply to designations to United Ways. The full amount of your pledge will be receipted.

Enter a name, keyword or full CRA number to find a registered Canadian charity.

Search

Previous Next

2. Search for your charity

United Way  
Alberta Capital Region

1 Donate 2 Designate (Optional) 3 Information 4 Confirm

Your total gift to United Way National Campaign: \$1,000.00

Your Donation: \$1,000.00

If you would like to be a part of creating systemic change where you live, we hope you'll make a gift that stays with United Way. By investing directly in our network of agencies, you will ensure people in our community continue to receive the support they rely on. Donors will be publicly recognized according to their local United Way's guidelines and may only be publicly recognized for funds invested in our work.

Donors may designate a portion of their gift to other charities in addition to their support of United Way, for a fee of \$25 per organisation. The fee does not apply to designations to United Ways. The full amount of your pledge will be receipted.

Enter a name, keyword or full CRA number to find a registered Canadian charity.

United Way of the Alberta Capital Region

Previous Next

**Charity List**

Name	City
United Way of The Alberta Capital Region	Edmonton

add

Cancel

3. In Charity List window, click "add" next to your preferred charity.

4. Choose the value that you would like to donate to the specific charity.

5. If your charity does not appear, search for United Way of the Alberta Capital Region and add a note with the organization name and CRA registration number.

To confirm the charity name, CRA registration number, and their status please visit the [CRA website](#).

6. Designation will appear on confirmation page.

# 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: 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.

## 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.

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

1. Login using your UnitedWay@work admin credentials. If you are entitled to administrative privileges and do not have login credentials, please contact [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca).
2. Click "Campaign Management" on the top left.
3. Click "Employee Search" on the left-hand side.
4. Search for the individual by Name, Email, or Employee ID.

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

6. Click on the “Employee Details”, confirm the employee details, and scroll to the bottom of the page and click “Save and Send Welcome Email.”

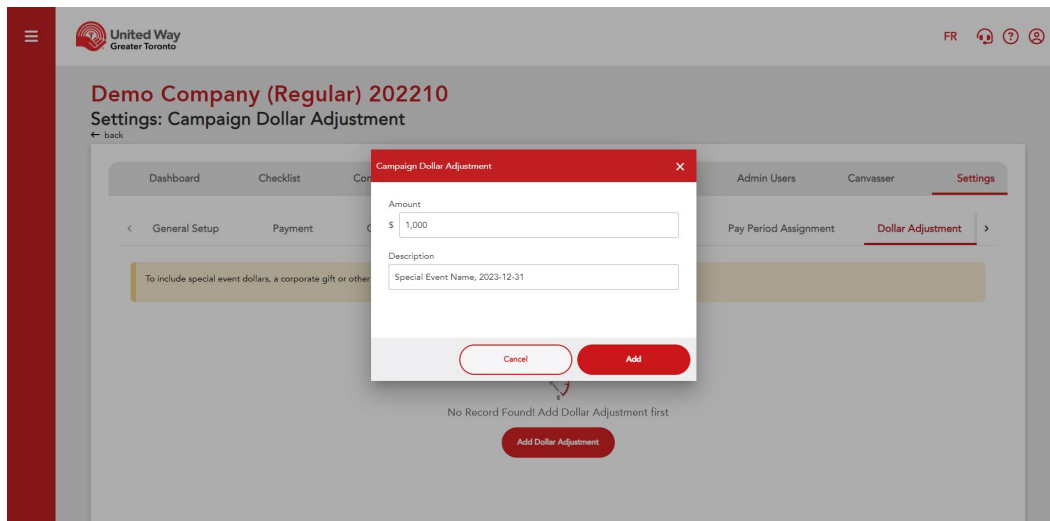


## Using the Campaign Dollar Adjustments Function

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.

### To Add Donations:

1. Login using your UnitedWay@work admin credentials. If you are entitled to financial administrative privileges and don't have login credentials, please contact [helpdesk@myunitedway.ca](mailto:helpdesk@myunitedway.ca).
2. Click "Campaign Management" in the top left.
3. Click "Settings".
4. Click "Dollar Adjustment".
5. Enter a detailed description, including the date, to easily distinguish each item.  
e.g., 'Special Event Name, 2023-12-31'.
6. Enter the total amount collected.
7. Click "Add".



The screenshot displays the United Way Greater Toronto admin interface. The main header shows the United Way logo and the text "United Way Greater Toronto". The page title is "Demo Company (Regular) 202210" with a sub-header "Settings: Campaign Dollar Adjustment". A modal form titled "Campaign Dollar Adjustment" is open in the center. It contains two input fields: "Amount" with a value of "\$ 1,000" and "Description" with the text "Special Event Name, 2023-12-31". Below the fields are "Cancel" and "Add" buttons. The background interface shows a sidebar with "Dashboard", "Checklist", and "Campaign Management" (selected). The "Campaign Management" section has tabs for "General Setup", "Payment", "Admin Users", "Canvasser", and "Settings" (selected). The "Settings" tab has sub-tabs for "Pay Period Assignment" and "Dollar Adjustment" (selected). A message at the bottom of the modal says "No Record Found! Add Dollar Adjustment first" with an "Add Dollar Adjustment" button.

### To Remove Donations:

1. Follow Steps 1-4 above.
2. Find the donation you wish to remove.
3. Click the "Delete" button 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 Dollar Adjustment, it cannot be edited. If you need to edit a donation entered through the 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. Note: This report only appears in Company Reporting.

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.

## 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 UnitedWay@work?

Like any transactional website, there are some basic technical requirements. 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 a welcome email with a personalized link, you may run a Lite campaign which is a link that you will share with your employees.

### 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 "Designate to Other Canadian Charities" 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 4.

### 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 confirming 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 8. 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 our 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 [servicehub@myunitedway.ca](mailto:servicehub@myunitedway.ca) and we will add them to a do not contact listing.