

@WORK USER GUIDE

United Way of the Alberta Capital Region

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About UnitedWay@work

UnitedWay@work (@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, providing a quick and easy way to donate through a variety of methods, including payroll, cheque, credit card, etc.

UnitedWay@work offers two types of campaigns:

Personalized Pledge Campaigns (PPC) provides an enhanced donor experience, including personalized emails, donation pages and giving history which is attached to an employee's email address. Donors must create a profile when their workplace is running a PPC campaign.

Lite Campaigns are a simplified donor experience. No personalization is available, and donors do not have to create a profile.





For Users

Donate Using Your Campaign Welcome Email

1. Within the welcome email, click on the provided donation link.
2. Users who have used @work with this email address will not need to create a new profile and may reuse their password year after year.
3. If this is the first time you have used UnitedWay@work with this email address, or if you've forgotten your password, click on "First time user?" to setup your password.
 - a. Enter the email address that your welcome email was addressed to.
 - b. A system email will be sent to your email address with instructions on resetting your password. Click on the link in the password reset email and follow the instructions.
 - c. 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.
4. You will be asked to make a Pledge Decision by choosing "Donate Now" or "Not This Year." Users who choose not to donate will not receive subsequent email reminders, and their choice will be logged as participation. Users who do not make a choice at this time will receive reminder emails until a decision is made or the campaign ends.
5. To donate, 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.
6. Select payment method.
7. Enter in your donation amount or select pre-set donation amounts.





8. If you would like to designate, please select “Designate to Other Canadian Charities.”
 - a. 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 “Write-In Designation” and adding a Note to indicate your preferred charity.
 - b. You can designate donations to multiple charities if you choose.
 - c. Click “Next.”
9. Enter in your address details and credit card details (if applicable).
 - a. Please ensure this is also your billing address if paying by credit card.
 - b. You are given the option to select a recognition name if you are giving at the Leaders of the Way level (over \$1,200) or as a Pathfinder (over \$10,000).
 - c. You can mark your donation as anonymous.
 - d. Click “Next.”
10. You will now be provided with a confirmation screen. Please review to ensure all your information is correct, including designation details.
 - a. You can mark your donation as anonymous to any designated third-party charities.
 - b. You may have your confirmation email sent to more than one email address.
 - c. Click “Submit.”
11. You will reach the thank you page, confirming your donation has been processed.
12. 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." In a Lite Campaign, users do not have the option to choose "Not This Year" as a donation decision.
3. Select payment method.
4. Enter in your donation amount or select pre-set donation amounts.
5. If you would like to designate, please select "Designate to Other Canadian Charities."
 - a. 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 "Write-In Designation" and adding a Note to indicate your preferred charity.
 - b. You can designate donations to multiple charities if you choose.
 - c. Click "Next."
6. Enter in your address details and credit card details (if applicable).
 - a. Please ensure this is also your billing address if paying by credit card.
 - b. You are given the option to select a recognition name if you are giving at the Leaders of the Way level (over \$1,200) or as a Pathfinder (over \$10,000).
 - c. You can mark your donation as anonymous.
 - d. Click "Next."





7. You will now be provided with a confirmation screen. Please review to ensure all your information is correct, including designation details.
 - a. You can mark your donation as anonymous to designated third-party charities.
 - b. You may also have your confirmation email sent to more than one email address.
 - c. Click "Submit."
8. You will reach the thank you page, confirming your donation has been processed.
9. You will receive a confirmation email with your donation details included.



**Tax Receipt Information:**

- If you made a one-time credit card donation, tax receipts will be issued shortly after the donation has been processed by United Way. Monthly credit card donations made through @work will be processed starting in the new calendar year after your campaign and will continue for the 12 months of that year. As such, consolidated receipts will be issued in February of the year after the final payment is made.
- Payroll donations will be noted on your T4 slip.
- If you have any questions regarding receipting, please email 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 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.





Designating Your Gift

You may donate to other registered Canadian charities directly through the UnitedWay@work system.

1. Click "Designate to Other Canadian Charities."

2. Search for your charity

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 "Write-In Designation" 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. Your designation will appear on confirmation page.





For ECCs

Setting Up Your Campaign

United Way of the Alberta Capital Region can assist you in setting up your UnitedWay@work Personalized Pledge Campaign (PPC) or Lite Campaign

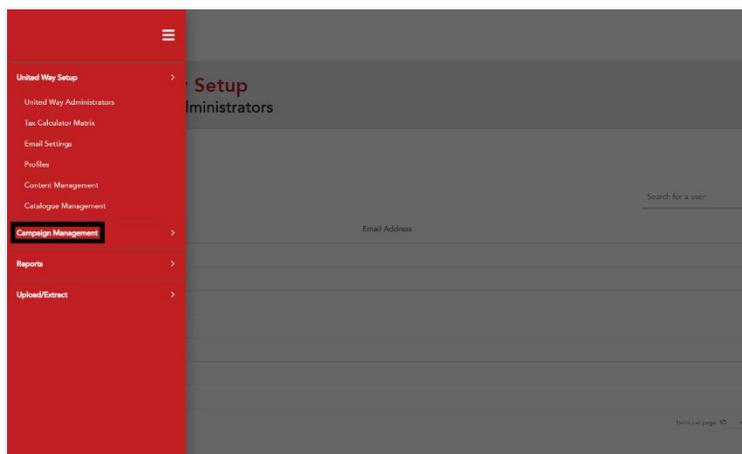
Submit your request via [UnitedWay@work Campaign Set-Up Form](#). Our staff require a minimum of three weeks' notice to set up your campaign to ensure the site is ready in time for your campaign launch.



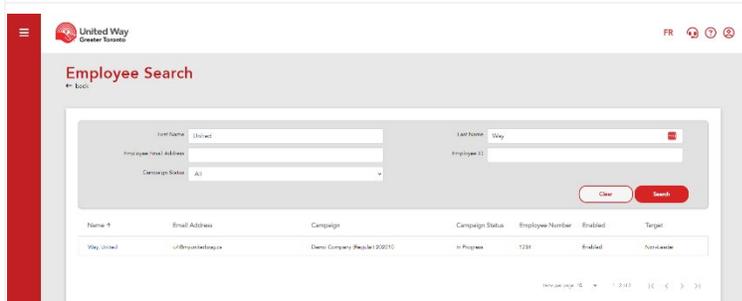


Resending Emails to an Individual

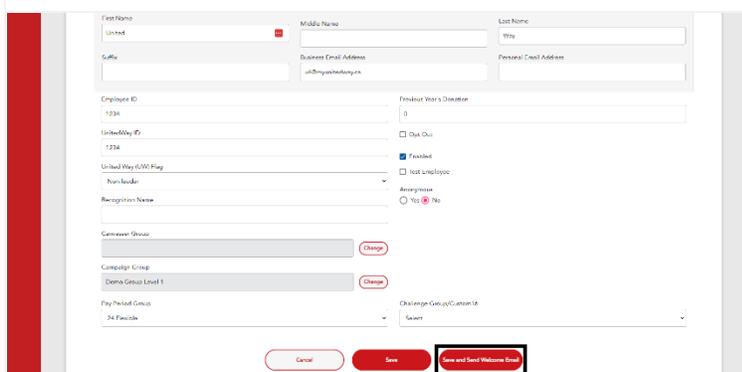
There may be times that you need to resend emails to employees. This can be done through the Workplace Administrator dashboard.



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.
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."



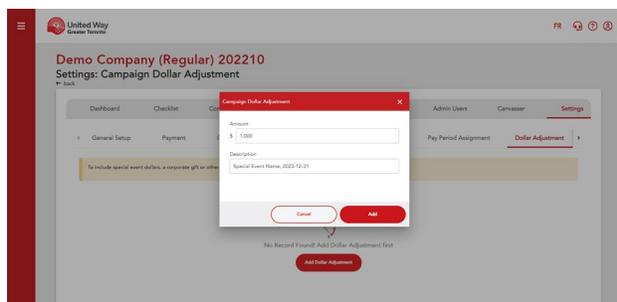


Using the Campaign Dollar Adjustments Function

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. Only administrators with financial privileges can make this adjustment.

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.
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. Click "Add".

To Remove Donations:

7. Follow Steps 1-4 above.
8. Find the donation you wish to remove.
9. Click the "Delete" button beside the donation.

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. If you need assistance with donating or have other queries, please email 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 (kick-off 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 in Appendix A of this guide.

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?

To create a Personalized Pledge Campaign, your workplace must provide United Way of the Alberta Capital Region with (at minimum) the first name, last name, and work email address of all employees. This will enable a unique UnitedWay@work link to be sent to each employee.

If you do not wish to send unique links, you may run a Lite Campaign. This is a link that you will share with all employees and does not include personal information.

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 when setting up their donation. The user can select more than one registered charity to attribute the donation to and/or split the gift between different United Way focus areas. For further details, see the Designating Your Gift section on page 4.

How can employees donate publicly traded securities?

Supporters can choose to donate publicly traded securities value at \$1,000 or more through the UnitedWay@work system. For more information about this giving option, please contact United Way at (780) 990-1000.

How do donors 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?

Donors who provide their full name and home address are eligible for 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 above (**Resending Emails to an Individual**). If the issue persists, please email 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 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.

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

Please visit 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 Way?

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 and we will add them to a do not contact list.





Appendix A: Technical Readiness Assessment for UnitedWay@Work

The Technical Readiness Assessment (TRA) will quickly determine if running an online UnitedWay@work campaign at your organization is technically possible. Please contact the appropriate person to answer the questions as accurately as possible for your organization. This is general technical information to determine whether your systems' setup meets the criteria for running an online campaign using United Way@work.

Prerequisites

The minimum and recommended requirements for clients and servers using the United Way@work application. It is advised that you meet all Prerequisites before starting your campaign. If you need information about meeting these prerequisites, refer to the end of this document.

Confirm that all prerequisites are met in each desktop that will use the United Way@work application:

- TLS 1.2 is enabled (TLS 1.0, 1.1 and SSL V.3 are not supported)
- Have JavaScript enabled
- Allow Session cookies
- Have browsers that support 256-bit SSL encryption (Chrome V 70 and above, Firefox V 63 and above, Microsoft Edge 91)
- Allow Pop-up windows for donate.uwatwork.com and admin.uwatwork.com
- Allow PDF email attachments (size: 700 kb)





Questionnaire

1. Confirm that your email server is configured to whitelist incoming email from:
 - campaign@uwatwork.com
 - assistance@uwgt.org
 - ereceipt@uwgt.org
 - centraide@uncllc.com
 - emails from uwgt.org domain
 - helpdesk@myunitedway.ca
 - servicehub@myunitedway.ca
 - informationservices@myunitedway.ca
 - emails from myunitedway.ca domain
2. Confirm the following web sites are allowed in your environment (browser, web filtering and Proxy etc.)
 - donate.uwatwork.com (40.69.122.123)
 - admin.uwatwork.com (52.229.69.181)
 - api.uwatwork.com (40.86.205.28)
 - unitedway.sharefile.com
 - secure.rightsignature.com
3. Confirm the following email domains and / or IP addresses are whitelisted:
 - Domain: secure.uwatwork.com and IPs: 74.213.188.78 and 24.137.204.14
 - Domain: mail2.uwgt.org and IP: 24.137.204.2
 - Domain: mail3.uwgt.org and IP: 69.77.177.51
 - Domain: wrqvxzk.outbound-mail.sendgrid.net and IP: 149.72.175.225
 - Domain: em1190.uwatwork.com
 - Domain: email.myunitedway.ca and IP: 168.245.32.105
 - Domain: link.myunitedway.ca and IP: 168.245.32.105
4. Confirm the number of email domains at your workplace:
(e.g.: user@company.ca & user@company.com)
5. Do you have restrictions on how many e-mails can be received from a specific mail server?
 - If yes, what are the number of e-mails allowed per batch and the minutes between batches?
 - # Emails:
 - Minutes between batches:

