



COMPANY _____ DATE _____

	Contact Name	Email	Phone
ECM			
DATA			
UWGKC STAFF			
UWGKC EWAY			

	Admin Site Access	Email	Phone
2017			
2017			
2017			
2016			
2016			

	Date		Date
DATA FILE DUE TO UWGKC		CAMPAIGN START	
SITE LIVE		ACTIVE CAMPAIGN CONCLUDES	

NOTES:

CAMPAIGN CODE _____

TEST USERNAME _____

TEST PASSWORD _____



Data File Upload Details Excel spreadsheet format; due six weeks prior to campaign kickoff

	2016		2017		Provided By & Date
CAMPAIGN CODE*					
DONOR IDENTIFIER* <i>Should be unique & in same format as last year</i>					
USERNAME*					
PASSWORD*					
PAY PERIODS PER YEAR*					
WORK ZIP CODE PROVIDED <i>Required if donor groups is "yes"</i>	Yes	No	Yes	No	
DONOR GROUPS? DETAILS:	Yes	No	Yes	No	

Regional Account Note: Donor Groups are used for reporting but payments to United Ways are based on Work Zip Codes.

COMPANY LEVELS** DETAILS:**	Yes	No	Yes	No	
WORK EMAIL PROVIDED	Yes	No	Yes	No	
PREVIOUS YEAR PLEDGE PROVIDED	Yes	No	Yes	No	
SALARY PROVIDED	Yes	No	Yes	No	
CONTINUOUS GIVING <i>Payroll deductions carryover without designations</i>	Yes	No	Yes	No	
EMPLOYEE REQUIRED TO CHANGE PASSWORD AT NEXT LOGIN	Yes	No	Yes	No	

NOTES:

*** Required field in file submission ** Required in file submission if company levels are "yes"**



Site Design

	2016		2017		Provided By & Date
LOGO	Yes	No	Same	New	
WELCOME LETTER (.DOC)	Yes	No	Same	New	
NEW PICTURE (HI-RES .JPG)	Yes	No	Same	New	
GOAL THERMOMETER	Yes	No \$	Yes	No \$	
PARTICIPATION THERMOMETER	Yes	No %	Yes	No %	

'CONTACT US' INFORMATION

Name _____ Email _____ Phone _____

Name _____ Email _____ Phone _____

PREVIOUS YEAR PLEDGE	Yes	No	Yes	No	
PER PAY PERIOD	CV#		CV#		
ANNUAL	CV#		CV#		
PAY DEDUCT ONLY?					
OTHER PAYMENT TYPES					
INCREASE CHALLENGE?	Yes	No	Yes	No	
5%	CV#		CV#		
10%	CV#		CV#		
15%	CV#		CV#		
OTHER	CV#		CV#		

2016 PREVIOUS PLEDGE MESSAGING: ANY CHANGES? Yes No

DETAILS:

THANK YOU MESSAGE IN EWAY	Yes	No	Same	New	
EMAIL THANK YOU	Yes	No	Same	New	
KICKOFF EMAIL SENT BY UW	Yes	No	Same	New	
OTHER EMAILS SENT BY UW	Yes	No	Same	New	

Local IT should whitelist the uwgkc.org and unitedwaygkc.org domains and open the flow control for the duration of the campaign.

DETAILS:

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Payment Types

Payment types offered: Payroll Deduction, Credit/Debit, Electronic Check, Direct Bill, Stock and No Donation

For payroll deduction, complete the following:

	2016		2017		Provided By & Date
PAYROLL DEDUCTION	Yes	No	Yes	No	
PERCENTAGE	Yes	No	Yes	No	Specifics
PER PAY PERIOD	Yes	No	Yes	No	Specifics
TOTAL PLEDGE	Yes	No	Yes	No	
ONE-TIME PAYROLL	Yes	No	Yes	No	
PAYROLL DEDUCTION BEGINS (MO/YR)					
PAYROLL EXPORT DATE (SENT BY UW)					

For payroll deductions, we will send a file with Employee ID Number, Donor Name, and Total Pledge Amount.

REGIONAL CAMPAIGN

Does the company remit payroll payments to any United Way other than UWGKC? Yes No

Please note: United Way of Wyandotte County is a separate United Way

NOTES:

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Custom Reports and Exports

Custom Reports and Exports Used in 2016:

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Custom Reports and Exports Anticipated in 2017:

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