

# WORKPLACE REPORT FORM INSTRUCTIONS



Sort pledge forms by Corporate, Cash, Checks, Credit Card payments and Payroll Deduction.

## I. Corporate Gift

- A. Have Corporate Pledge Form signed by authorized person.
- B. Enter Corporate Gift Amount on Report Form.
- C. Indicate if the gift is enclosed, to be invoiced by United Way or previously sent into the UWWC.

## II. Employee Section - Fill out the back of Report Form with each donor's pledge form information. If you have more employees than rows, please copy form as needed. For easier reporting, download the Excel version Report Form available online at <http://www.uwwill.org/Campaign/Reporting>

### A. Cash

1. Enter the total dollar amount by cash and the number of donors on the Fully Paid Cash line.
2. Attach cash by paper clip to corresponding pledge form.

### B. Checks

1. Ensure all checks are payable to United Way of Will County.
2. Attach check by paper clip to corresponding pledge form.
3. Enter the total dollar amount by check and the number of donors on the Fully Paid by Check line.
4. **IMPORTANT!** Checks must be turned into the United Way office in a timely manner. If your campaign will not be completed within a month since you have received checks, mark your Report Form as "**partial**" and turn in the collected checks (and cash) to the United Way office.

### C. Credit Cards

1. For security reasons, we only accept Credit Card pledges through our website or phone call.
2. Employees wishing to donate by Credit Card can call our office at 815-723-2500 or visit our secure webpage at [www.uwwill.org](http://www.uwwill.org) and click on the "Donate" button.
3. Attach a copy of the employee's emailed Credit Card receipt to their pledge form.
4. Enter the total dollar amount by Credit Card and the number of donors on the Credit Card Charges line.

### D. Payroll Deduction

1. Ensure total annual gift pledge amount is completed on all payroll deduction pledge forms.
2. Enter the total dollar amount by payroll deduction and the number of donors on the Payroll Deduction line.
3. Tear off Yellow portion of pledge forms and submitted to your Payroll Department to process.
4. Indicate how often your payroll department will be submitting pledges.
5. Supply us with the Payroll Representative Name and phone number.

### E. Total the Employee Gifts & Donors and enter on line provided.

## III. Special Events –Record amount raised and indicate the special event name on the Report Form.

## IV. Completion

1. Summarize the Corporate, Employee and Special Event totals in the Grand Total box on the Report Form.
2. **Make a copy** of completed Report Form for your records.
3. *Give your Payroll Department the yellow portions of the payroll deduction pledge cards.*
4. Place the completed Report Form and all pledge forms and attachments in an envelope. **Call United Way office 815.723.2500** to have Report Form and all pledge forms, checks & cash donations picked up, or bring to the United Way office at 54 N. Ottawa Street Suite 300, Joliet, Illinois. You may also mail in the report, pledge forms and checks. **Please do not mail cash.**

## V. Thank all your donors.

## VI. If you have any questions, contact the United Way office at 815.723.2500

**THANK YOU for your help with this year's campaign!**