

**e-Pledge Guide  
for IU United Way Campaign Volunteers**

How to use e-Pledge to manage your campaign and how to donate

Version 2023

**Please note:**

United Way of Monroe County has become  
United Way of South Central Indiana.

# Managing your campaign with e-Pledge

Andar e-Pledge is the online donation system for the IU United Way campaign. Through e-Pledge, IU employees can donate via payroll deduction, bill me, check, or credit/debit card. Campaign volunteers can access campaign information and campaign reports on the e-Pledge site.

All online pledging is live: campaign reports will be updated immediately. Paper pledges may take a few days to appear in reports, due to the time delay caused by manual entry into the database.

## LOGGING IN

Campaign volunteer resources are available on [www.unitedway.indiana.edu](http://www.unitedway.indiana.edu) by scrolling down to the bottom and clicking “CAMPAIGN LEADER RESOURCES.” On this page, the red “Access e-Pledge” button will take you to the e-Pledge system. NOTE: This is not how IU employees will access e-Pledge; more information is included later in the guide. You can also access e-Pledge through [this link](#).

**PLEASE NOTE:** You cannot copy and paste the e-Pledge link from the browser URL. To share e-Pledge with others, direct them to CAMPAIGN LEADER RESOURCES if they are a volunteer, or [unitedway.indiana.edu/how-give](http://unitedway.indiana.edu/how-give) if they are a donor.

You will be prompted to log in using your IU credentials through the SSO Duo Login system. If you are already logged into another IU site in your browser, it may connect you to e-Pledge without asking you to log in.

When you log out of e-Pledge, close your browser. If you’d like to log back in shortly after logging out, you must close your browser, return to [www.unitedway.indiana.edu](http://www.unitedway.indiana.edu), and click “Access e-Pledge” again.

## SWITCHING ROLES

When campaign volunteers log in to e-Pledge, the default page will be the coordinator page because their default role is **e-pledge coordinator**. This will show campaign information and reports. Campaign volunteers must switch roles to **employee donor** to make their own donation.

To switch roles, scroll down to the bottom of the screen, and on the left side of the page footer, click on “Employee Donor.” This will change your role to **employee donor** so that you can make your pledge.

When logged into e-Pledge as an employee donor, scroll down to the bottom, and on the left side of the page footer, click on “e-Pledge Coordinator” or “e-Pledge Administrator” (what appears will depend on your role) to return to the system where you can access campaign data and reports.

You do not need to log out to switch roles.

Note the yellow-circled role switcher options in the footer below:



## THE COORDINATORS' MENU

[Home](#) [Campaign Status](#) [IU Custom Rpts](#) [Reports Queue](#) [e-Mail Employees](#) [Logoff](#)

### Home

The Home screen has limited information about United Way. Do not return to the Home page after logging out.

### Campaign Status

On this page, you will first see a thermometer showing the campaign progress to the goal. Below the thermometer is a condensed report of the campaign progress. By default, it will show you the "Rollup Amount" report, which is a total report including Indiana University, IU Foundation, and IU Retirees. "All Locations" will display three lines showing the individual progress for IU, IU Foundation, and IU Retirees.

### IU Custom Rpts

This menu contains the many campaign reports you can choose from to get information about the ongoing campaign. More information about these reports is found in the "reporting" section of this guide.

### Reports Queue

This page is where you can access reports once there are finished being processed. More information about this is also found in the "reporting" section of this guide.

### e-Mail Employees

This feature is what volunteers can use to email IU employees within their department or team. More information about this is found in the "emailing employees" section of this guide.

### Logoff

You will be logged out of e-Pledge when you click this. To log back in, you must close your browser, return to [www.unitedway.indiana.edu](http://www.unitedway.indiana.edu), and click "Access e-Pledge."

## REPORTING

The e-Pledge reports are where you can get information about the progress of the campaign. There are 6 kinds of reports. You may not need to reference all reports; you can use whatever is helpful to you and your campaign.

The types of reports are as follows:

**IU Campaign Detail by team and dept:** An overall report that breaks down campaign donations by type of donation. Can only be run for all departments.

**IU Daily Status Report:** A report that shows daily summaries of campaign data, including total donors, total donations, and a breakdown of levels of Vanguard Donors. Can be filtered by team or department.

**IU No-Response Report:** A report of all employees that have not donated. Can be filtered by team or department.

**IU Responsive Donors:** A report of all employees that have donated and when they donated. Can be filtered by team or department.

**IU Summary I Report:** A report that compares current donation totals and participation percentage to the previous year's campaign. Cannot be filtered by department.

**IU Team & Dept Report:** An overall campaign report that shows number of donors, total donations, participation, and progress to goal. Can be filtered by team or department.

## RUNNING A REPORT

To run a report, select the report you'd like to run, scroll down, and click the "Submit" button. For all reports EXCEPT the IU Campaign Detail by team & dept and Summary I Report, you will be taken to a second screen to select a team or department. To do this, you must click the drop-down arrow next to "Select." Keep in mind, some reports, such as the IU No-Response Report, can produce a report several hundred pages long if you do not filter by team or department.

The image displays two screenshots of the IU Daily Status Report interface. The left screenshot shows the main report title "IU DAILY STATUS REPORT" and the subtitle "Pledges by date, team, and dept. No donor info". Below this, there is a "Select" dropdown menu with the text "Select (\*All to include all sort field types)" and a "Sort" dropdown menu. At the bottom, there are "Submit" and "Cancel" buttons. The right screenshot shows the detailed filter options for the "Team", "Dept", and "CAS\_ID" fields. The "Team" dropdown menu is open, showing options: "All", "Team 01", "TEAM 02", "TEAM 03", and "TEAM 04". The "Dept" dropdown menu is also open, showing options: "All", "BA-ATHL", "BA-AUTM", "BA-AXAD", and "BA-BRAD". The "CAS\_ID" dropdown menu is open, showing the option: "All".

Once you make your selection and click "Submit" again, the screen will reload and you should see a message in red indicating that the report was submitted successfully to the e-Pledge server.

All reports will be generated as CSV files. Your reports can be accessed on the IU CUSTOM RPTS page at the bottom of the page, under “Outputs” or on the REPORTS QUEUE page.

If your report creates a large file, it may take longer to run. If it is still running, the “Status” column will say “Writing” or “Executing” and the link to the report will not be clickable. Refresh the page to check the report’s status. Once the report is ready, the “Status” column will say “Ready,” and the report link will be a blue clickable link. Click on it to download the CSV file.

Refresh										
<input type="checkbox"/> Show Outstanding										
<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description	
<input type="checkbox"/>	102748	IU Team & Dept Report	<a href="#">Indiana University - Pledge Campaign Level Summary Report</a>	09/01/2021 08:03:49 AM	10	25.8 KB	pdf	Ready		

### EMAILING EMPLOYEES

Below is the top half of the page used to email employees:

The screenshot shows the 'SEND EMAIL' interface. It includes fields for 'To employees' (Coordinator: Ms. Catherine Blankensop), 'Campaign Year' (\*Current Year), 'Campaigns' (All Campaigns, United Way Campaign), 'Transactions Created' (From: Aug 31 2020, To: Aug 31 2021), and 'With Amounts' (From: -9999999999, To: 9999999999). At the bottom, the 'Send To' section is circled in yellow, containing 'Respondents' and 'Non-Respondents' checkboxes.

Somewhat counter-intuitively, the first step in composing an emailing is to choose whether it will be sent to “Respondents” or “Non-Respondents” under the “Send To” header (as circled above). This is how the system refers to those who have donated and those who have not donated this year, respectively.

**\*Without first specifying this, other fields will be locked and unable to be changed.\***

## Campaign Year

It is recommended to leave this as “Current Year.” If you were interested in emailing donors from past years, you could change this field.

## Campaign

For this field, be sure to change the default “All Campaigns” to “United Way Campaign.”

## Transactions Created

This field allows you to contact specific groups of donors. For example, if you chose “Respondents” and limited the date range to the past week, your email would be sent to all employees who have donated in the past week. If it does not need to be restricted, the time period for this year’s campaign is March 1, 2023 through December 31, 2023.

Please note that, after the 2023 campaign year, all campaigns will be run on a calendar year basis. So a campaign year will be Jan 1 through Dec 31. Because 2023 is the transition year, it runs from March through December.

## With Amounts

This field allows you to contact donors based on the amount they donated. You do not need to change it if you are emailing all donors regardless of amount. As an example, this field might be utilized when thanking Vanguard Donors, whose gift amount must be  $\geq$  \$1,000.

## Select:

The most important field, it allows you to select teams or departments whose employees should receive the email. You must click the arrow to the left of “select” to prompt this selection to drop down.

The screenshot shows a dropdown menu titled "Select (\*All to include all sort field types)". It contains four selection boxes:

- Team:** \*All, Team 01, TEAM 02, TEAM 03, TEAM 04
- Dept:** \*All, BA-ATHL, BA-AUTM, BA-AXAD, BA-BRAD
- CAS\_ID:** \*All
- IUPayGroupCode:** \*All

**NOTE: Be careful here! If you leave the selection boxes set to default, the system could send your email to all 10,000 IU employees!**

Now here's the second half of the screen – the fun half, where you get to compose the email:

Contact Rule Category: ePledge

**Compose**

Email Template: \*None

Sender's Email Address: \*Catherine Blankensop\* <david@monroeunitedway.org>

Subject: [Empty]

File Edit View Format

Paragraph B I [Alignment icons]

POWERED BY TINY

Note variables: User ID

Email Attachments: Choose File

No attachments

Comm Log Subject Code: Campaign

Email Job Log:

Save As Template Name: [Empty]

Editable by creator only

Delete Template

Save Template

Save Template and Send

Send

Cancel

### Contact Rule Category

Leave at default “e-Pledge.”

### Email Template

You can choose an existing email template from the drop-down. You may also write your own email and save it under a unique template name to be retrieved for later emails.

### **Sender's Email Address**

You will notice that a coordinator's name is shown, but the sending address will always be the United Way email, [UWMCCampaign@monroeunitedway.org](mailto:UWMCCampaign@monroeunitedway.org). This is for technical reasons having to do with the way e-Pledge relays emails through United Way of Monroe County. **NOTE:** As a result of this limitation, please make it clear to your email recipients who you are, and that if they wish to reply to your email, they will need to start a new email addressed to your email address.

### **Note Variables**

These are system variables – such as <firstname>, etc -- that can be inserted in your email. For example, inserting <firstname> would auto-fill the first name of each recipient. Choose a note variable from the dropdown and click on the clipboard to insert that variable in the text of the email at the cursor insertion point.

### **Attachments**

For security reasons, the ability to attach files has been turned off.

### **Comm Log Subject Code**

You can leave this at default or choose a code from the drop-down. The code becomes associated with your email in the e-Pledge system communications log.

### **Email Job Log**

If you check this box, the log information will be sent to the sender. This may mean the information will go to David Cook rather than you. This feature still needs to be tested.

# Using e-Pledge to donate to United Way

## LOGGING IN

Donors should be directed to [www.unitedway.indiana.edu/how-give](http://www.unitedway.indiana.edu/how-give). Once on this page, they can read about the different ways to donate. They should scroll down and click the red “Donate now through e-Pledge!” button to log into e-Pledge.

They will be prompted to log in using the IU credentials or will be automatically logged in if they are already logged in to an IU site on their browser.

## WHAT DONORS SEE

[Home](#) [Logoff](#) **[PLEDGE NOW](#)** [eNews Subscribe](#) [My History](#) [My Interests](#) [My Profile](#)

### E-News Subscribe

This menu item sends a request to United Way to be added to the subscription list for the monthly eNews newsletter.

### My history

Shows your account history

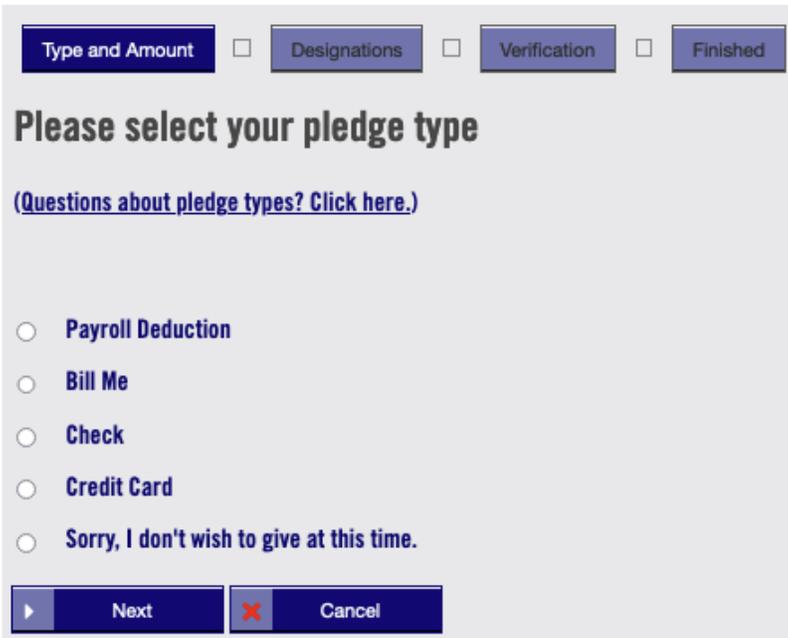
### My interests

This is a place to select areas of interest such as financial stability or seniors. One of the interests is **volunteering**, which tells United Way that you might be interested in volunteering.

### My profile

Shows basic information about your donor account.

When they click on **Pledge Now**, they see the first page of the pledging menu:



The screenshot shows a web interface for the pledging process. At the top, there are four buttons: "Type and Amount", "Designations", "Verification", and "Finished", each with a small square icon to its right. Below these buttons is the heading "Please select your pledge type" and a link "(Questions about pledge types? Click here.)". There are five radio button options: "Payroll Deduction", "Bill Me", "Check", "Credit Card", and "Sorry, I don't wish to give at this time.". At the bottom, there are two buttons: "Next" and "Cancel".

A couple of points of note:

- Though few retirees have IU login access anymore, if a retiree does login and reach this pledge menu, they won't see the **Payroll Deduction** pledging type because retirees cannot use payroll deduction.
- Please note that there is a **no-pledge** option (Sorry, I don't wish to pledge at this time); this allows someone to pledge no-pledge (rather than a zero-pledge) so that we can see their intent clearly. A pledge of zero dollars could be a mistake, but a choice of No-pledge is clear.

Once a pledge type is chosen, and the donor clicks **Next**, they see the screen for their particular pledge type.

The different ways to donate are explained below:

### Payroll Deduction Pledges

Note that the number of pay periods is taken from the employee's record in the e-Pledge system. If it is incorrect for some reason, they can override it, but only from within a restricted list of choices.

The screenshot shows a form for setting up a payroll deduction pledge. It includes radio button options for the pledge type, a date field for the start date, a numeric input field for the deduction per pay period, a fixed value for pay periods per year, and a list of annual pledge amounts with an 'Other Amount' option and a corresponding input field.

**Payroll Deduction**

**Bill Me**

**Check**

**Credit Card**

**Sorry, I don't wish to give at this time.**

**Deduction Start Date:** Jan 01, 2022

**Deduction Per Pay Period:** 0

**Pay Periods Per Year:** 24

**Total Annual Pledge:**

\$25.00

\$50.00

\$100

\$250

\$500

\$1000

**Other Amount**

\$0.00

### Bill-Me Pledges

Bill-me pledges allow the donor to pledge a certain annual amount to be paid to United Way of Monroe County in equal installments. The payment arrangement is between the donor and United Way; it does not go through IU's payroll department. Bill-me pledges must be \$100 total or more.

Payroll Deduction

Bill Me

Check

Credit Card

Sorry, I don't wish to give at this time.

Pledge amount is the total gift amount, not the amount per billing period.

**Pledge Amount:**

\$25.00

\$50.00

\$100

\$250

\$500

\$1000

Other Amount

**Billing Start Date:** Jan 01, 2022

**Billing Frequency:**

Monthly

Quarterly

Semi-Annually

Yearly

As with payroll deductions, the Bill-Me pledge type allows designations.

## Pledge by Personal Check

A donor who wishes to give by check can fill out an online pledge before mailing their check to United Way of Monroe County.

Payroll Deduction

Bill Me

Check

Credit Card

Sorry, I don't wish to give at this time.

Pledge Amount:

\$25.00

\$50.00

\$100

\$250

\$500

\$1000

Other Amount

Check Date:

Check Number:

Donating with check also allows designations.

## Credit Card Pledges

These pledges are handled by our secure web processor Clover Connect.

Payroll Deduction

Bill Me

Check

Credit Card

Sorry, I don't wish to give at this time.

Pledge Amount:

\$25.00

\$50.00

\$100

\$250

\$500

\$1000

Other Amount

A couple of notes:

- E-Pledge does not currently support recurring credit card pledges. If you wish to setup a new recurring pledge by credit card, please visit our website at [www.monroeunitedway.org](http://www.monroeunitedway.org).
- A recurring pledge is auto-renewing until the donor contacts UWSCI to cancel or change it.

### No Pledge (Sorry, I don't wish to give at this time)

This option is for those who do not wish to give for this campaign and would like this decision to be recorded by United Way of Monroe County. If the donor chooses this option, they are taken to an abbreviated version of the **Verification** page, which acknowledges their decision:

Type and Amount  Designations  **Verification**  Finished

I do not wish to give at this time.

Name

Prefix:  Middle:  Last:  Suffix:

\* Individual Work Email

Your preference to not pledge this year will be recorded.

Confirm

For no-pledge to be recorded, the donor should click **Confirm**. Clicking **Cancel** does not record the no-pledge decision; instead, it records a cancelled pledge.

### ENTERING DESIGNATION

When donating via e-Pledge, once the total pledge amount is not zero, there will be a new option displayed above the Next and Cancel buttons:

I want to specify one or more organizations to receive my gift

I trust United Way of South Central Indiana to use my gift where it is most needed.

The default for donations to United Way is that funds go into our Community Action Fund. However, donors are able to designate all or part of their donation to one or more external 501(c)(3) non-profits.

Designations are a way to allocate part or all of your pledge to specific organizations. If you choose the default (I trust United Way) then your entire pledge is directed to the United Way Community Action Fund (CAF). If you choose to designate, then you will be taken to the designation section of the pledge.

## Community Action Fund

Donors will first have the choice to designate to the Community Action Fund. These funds will be undesignated and used to fund United Way’s partner agency allocations.

Type and Amount   **Designations**   Verification   Finished

### Community Action Fund

Your gift to United Way touches 1 in 3 community members each year. Giving to the Community Action Fund means that your gift will have the greatest local impact. From providing meals, safe shelter, and after-school care to disaster recovery, healthcare access, and financial stability, your gift to the Community Action Fund will help with the most critical needs facing our region. Please give generously.

Total Pledge	\$100.00
Total Designated	\$0.00
Total Undesignated	\$100.00

**COMMUNITY ACTION FUND**  
([Questions about this section? Click here.](#))

Designation Amount

## Organization search

Once you have reached the designation screen, you’ll see the organization search box. Using this, you can locate organizations, including our partner agencies. For an example, on the following screen grab, I search for “symp”:

**OTHER ORGANIZATIONS**  
([Questions about this section? Click here.](#))

**Keyword**

Result: (1-2 of 2)

Name	Book #		
Bloomington Symphony Orchestra	133	<input type="button" value="📄"/>	<input type="button" value="+"/>
Southern Indiana Youth Symphony		<input type="button" value="📄"/>	<input type="button" value="+"/>

Result: (1-2 of 2)

Clicking the + sign next to any of the listings that are retrieved promotes that agency into another list directly above, which allows you to choose an amount to designate to that organization. For the example, I’ve chosen the Bloomington Symphony and decided to direct \$100 to them. Here’s what that looks like:

**OTHER ORGANIZATIONS**  
 (Questions about this section? [Click here.](#))

Name	Book #	Designation Amount
Bloomington Symphony Orchestra	133	<input type="text" value="\$100.00"/>

Keyword:

Result: (- of)

Name	Book #
Southern Indiana Youth Symphony	

Navigation: [Home] [Previous] [1] [Next] [End]

Notice that, after a found item has been promoted to the list above the search, it is removed from the list below the search.

**NOTE: There is a minimum \$25 per designation.**

As a donor specifies their designations, the box at the top of the designations page will change to show the total donation, how much has been designated, and how much remains undesignated.

Total Pledge	\$100.00
Total Designated	\$50.00
Total Undesignated	\$50.00

**VERIFICATION PAGE**

Having finished their pledge, the donor sees the Pledge Verification page, which is a partial summary of their pledge information, plus some additional information not collected previously in the pledge.

The fields on this page include:

**Name Lines 1 & 2**

These are the lines that would appear in a Vanguard roster listing. They don't show up for donors below the Vanguard level.

### Name and email

These will be auto generated. Double-check them to ensure they are correct. Please note: if you change your email in this field, it will change your email in the e-Pledge system. It is recommended that it is left as your IU email.

### Check boxes in the middle of the screen

- Do not contact me – not the same as “anonymous.” It means don’t call, email, or mail
- Send me an email confirmation – send confirmation of this pledge
- Young Leaders – the donor is a young leader as per UW definition

### Loyal contributor

The year the donor became a loyal contributor to United Way. Once this is entered, it will be remembered for future donations.

There are also some optional fields:

<b>IN MEMORIAM - THE ABOVE GIFT IS IN MEMORY OF A FRIEND OR LOVED ONE:</b>	<input type="text"/>
<b>IN HONOR OF - THE ABOVE GIFT HONORS SOMEONE SPECIAL:</b>	<input type="text"/>
<b>CONTACT INFO OF PERSON TO BE NOTIFIED OF THE GIFT</b>	<input type="text"/>
Affiliation	<input type="text"/>
<b>COMBINE ALL MY GIFTS WITH - ENTER THE NAME OF SOMEONE WITH WHOM YOU WANT YOUR GIVING HISTORY COMBINED</b>	<input type="text"/>

### In memoriam

Name of deceased person

### In honor of

Name of person being honored

### Contact info

The contact is the person you wish to have notified of your **in memoriam** or **in honor of** gift. Name and address would be good. Name and email OK

### Affiliation

This does not need to be filled in, as all donors are affiliated with IU unless the donor has an additional organization with whom they are affiliated.

## Combine all my gifts

This is if someone wants their donation combined and recorded with another individual, such as a spouse. The individual combined with can donate through IU, through any other organization, or independently. If the individual does not work at IU, please include as much information about them as possible.

## CONFIRMATION PAGE

This page shows a summary of the donor's pledge information (though not designation details). To record the pledge, the donor must click **Confirm**. In this example, the **in memoriam** field, along with the associated **contact info** field is filled out. There is also a noted affiliation with "Westinghouse."

Type and Amount  Designations  **Verification**  Finished

**PLEASE REVIEW YOUR PLEDGE AND CONFIRM IT BELOW:**

Pledge Type:	Check
Transaction Type:	Employee Fully Paid
Payment Type:	Check
Check Date:	Sep 02, 2021
Check Number:	1234
Total Current Pledge:	\$100.00
Total Pledge Year To Date:	\$1,100.00

----- Check Boxes -----

- Do not contact me! (I understand I may still be contacted if necessary about my account)
- Send me an email confirmation of this pledge
- Young Leaders Society - For those under 40 whose individual or combined gift is \$500 or more.
- eNews subscription - Keep me updated and show how my contribution is getting results.

**IN MEMORIAM:** Bill Jones  
The above gift is in memory of a friend or loved one.

**IN HONOR OF:**  
The above gift honors someone special.

**Contact info of person to be notified of the gift** Mrs. Wendy Jones, 123 ANywhere St, Noblesville, IN

**Affiliation** Westinghouse

**COMBINE ALL MY GIFTS WITH -**  
Enter the name of someone with whom you want your giving history combined

Confirmation page may take a few moments to display. Please click Confirm only once. Thank you.

**Confirm** Your pledge will be recorded... Thank you!

**Previous** Go back and change pledge information

**Cancel** Exit e-Pledge (no pledge will be recorded)