



Online Employee Giving Instructions for Campaign Coordinators

Pre Campaign:

- Complete **Online Employee Giving Site Setup Form** provided to you by your UPAF staff member. The entire checklist must be completed for the company site to be set-up. For questions, please contact your UPAF staff member or Jeannie Jackson at jjackson@upaf.org.
- E-mail your company's employee list (required), logo (optional), and landing page letter (optional) to jjackson@upaf.org.
- Allow five business days for UPAF to complete the initial setup of your Online Employee Giving site.
- Once the initial setup is complete, UPAF will contact you to schedule an in-person or over the phone introduction to your site. Any changes or adjustments to your site can be made at this time.

Post Campaign:

- **Wrap-up** your campaign by making sure the following are completed:
 - Make sure all individual pledges are entered in the Online Employee Giving site. Do not enter Special Events into the individual donor accounts, please use the Special Events account setup for your company.
 - Collect all checks associated with pledges and place in the large UPAF Report Envelope.
 - Separate cash and checks from independent fundraisers (i.e. raffles, bake sales, "jeans day,") and place in the large UPAF Report Envelope.
 - Print out a complete donor download and sort by payroll deduction. Forward this information to your payroll department. Check periodically with donors to make sure their pledge is being deducted each pay period. Report to UPAF any donors that have left your company throughout the year that pledged through payroll deduction.

What Do I Do With "Special Events" Money?

- Special events money (from bake sales, "jeans day," etc.) is considered additional money for an employee campaign and is applied to the employee giving total as a lump sum.
- Because a good or service is received in return for a special event pledge, the dollars cannot be applied to an individual and must remain in a lump sum.
- Keep fundraiser money separate from donor pledges. When you are ready to turn it in, place all special events money UPAF Report envelope.
- It is helpful for companies to turn in one company check in place of all special events money.
- If you have any questions regarding special events money, please contact your UPAF staff member or Loaned Executive.