

2017 Online Pledging Process

Solar Payroll Employees

United Way Campaign Underway

Employee Notifications

- Active full and part-time U.S. employees with active email addresses will receive an email August 7, 2017 from **CEUWA_cat@cat.com**
- E-mail will provide a “**Click here**” link to pledge online

PLEDGE NOW: [Click here](#) to access the online pledging site and log in using the following criteria:

Username: Employee badge number (do not include the “d”)

Password: Employee’s first and last initial (capitalized) and home zip code

After logging into the system, you will have the option to reset your password by clicking the 'Change Password' link. You may also locate the pledging site and other helpful resources by accessing the following website www.caterpillar.com/unitedway and selecting the Solar pledging link, or by clicking on the United Way icon on the Solar homepage.

- Employees without active email addresses (i.e. production employees), will have access to the pledge link via www.caterpillar.com/unitedway

New employees hired after July 19, 2017 that were not included on the file will not be eligible to pledge (direct employees to contribute to local United Way directly if interested)

Accessing eWay

Employees will log in with employee ID number as the username (do not include “d”).
Default password is the employee’s first and last initial and home zip code.



Welcome to the Employee United Way Appeal.

Please use the following criteria to log in:

Username = Employee ID number, Badge number or
PeopleSoft ID number

Examples:

Progress Rail/EMD employees = 123456

Solar employees (do not use the letter "d") = 12345

Caterpillar Production employees = 0123456

Password = Employees First and Last Initial and home zip
code (ie: KA12345) - Initials must be capitalized.

Solar, Progress Rail and Caterpillar Production Employees:
You are welcome to manually change your password after
logging in to the website using the "Change Password" link.

If you need log in assistance please email
CEUWA_Cat@CAT.com.

Login Information

Username

Password

→ [Login](#)

Employee will have
opportunity to reset
password immediately
after logging in using
'Change Password' tab

Pledge Now

Click on 'Pledge Now' link

Pledge Now

The screenshot shows the Caterpillar Live United website interface. At the top, the Caterpillar logo is on the left, and 'LIVE UNITED' is on the right next to the United Way logo. Below this is a navigation bar with three buttons: 'GIVE.' (highlighted in orange), 'ADVOCATE.' (in red), and 'VOLUNTEER.' (in blue). A yellow box with the text 'Pledge Now' and a red arrow points to the 'Pledge Now' link in a left-hand menu. The menu also includes links for Home, Giving History, Leadership Levels, and Change Password. The main content area features a 'Welcome Jane Doe' message, followed by the 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' header with the United Way logo. Below this is a section titled 'WHY UNITED WAY?' with the subtitle 'UNITED WAY'S MISSION ALIGNS WITH CATERPILLAR'S VALUES'. This section contains two columns of content. The left column has the Caterpillar logo and two icons: a house icon with the text 'Dedicated to transforming lives in the communities where we live and work.' and a graduation cap icon with the text 'Champion's programs that support education, environment and basic human needs.' The right column has the 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' logo and two icons: a head with gears icon with the text 'Goes beyond temporary fixes to create lasting change that lifts up entire communities around the world.' and a ribbon icon with the text 'Supports organizations making a difference in education, income & health.' At the bottom of each column are additional icons: a house and sun on the left, and a graduation cap, dollar sign, and plus sign on the right.

CATERPILLAR® **LIVE UNITED** **United Way**

GIVE. **ADVOCATE.** **VOLUNTEER.**

Welcome Jane Doe

CATERPILLAR EMPLOYEE UNITED WAY APPEAL
LIVE UNITED **United Way**

WHY UNITED WAY?

UNITED WAY'S MISSION ALIGNS WITH CATERPILLAR'S VALUES

CATERPILLAR® **CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED**

Dedicated to transforming lives in the communities where we live and work.

Goes beyond temporary fixes to create lasting change that lifts up entire communities around the world.

Champion's programs that support education, environment and basic human needs.

Supports organizations making a difference in education, income & health.

Employees who pledged in 2016

3 Options – Continue pledge, Change pledge, or I do not wish to contribute

The screenshot shows a web interface for managing pledges. At the top, there is a blue header bar and an orange bar with a red button labeled "ADVOCATE.". Below this is a progress bar with four steps: "Step 1: Pledge Information", "Step 2: Donor Information", "Step 3: Review", and "Step 4: Complete". The "Continue" button is highlighted in the progress bar. A sidebar on the left contains a "Portal" link. The main content area displays a "Pledge Summary" section with the following information:

Pledge Summary	
Based on last year's pledge, your new pledge has been created as shown below.	
Payment Type	Payroll Deduction
Pledge	\$2,000.00
Payment Detail	\$76.92 x 26 pay periods = \$2,000.00
Total Annual Amount	\$2,000.00
Designations	100.00 % Heart of Illinois United Way

Below the summary is a "Pledge Options" section with three radio button options:




- ☐ Continue with my pledge as shown
- ☐ Change my pledge and/or designations
- ☐ I do not wish to contribute this year - cancel my pledge

A red arrow points to the first option, "Continue with my pledge as shown". Another red arrow points to the "Continue" button at the bottom right of the form. A yellow callout box on the right contains the text: "If employee pledged in 2016: Review last year's pledge summary, select your Pledge Option and click **Continue**".

Pledging Options

Employees have 3 pledging options:

Payroll Deduction, Stock, or No thanks. I do not wish to contribute at this time.



GIVE.**ADVOCATE.****VOLUNTEER.**

[➔ Pledge Now](#)[➔ Home](#)[➔ Giving History](#)[➔ Leadership Levels](#)[➔ Change Password](#)

Step 1: Pledge InformationStep 2: Donor InformationStep 3: ReviewStep 4: Complete

Continue ➔

My pledge will be made the following way:

☒ Payroll Deduction

☐ Stock

☐ No thanks. I do not want to contribute at this time.

Continue ➔

Pledging Payroll Deduction

Employee has 2 options for payroll deduction:
Amount per pay period or One-time payment

The screenshot displays the Caterpillar Live United website interface for pledging payroll deduction. The top navigation bar includes the Caterpillar logo, the text "LIVE UNITED", and the United Way logo. Below this, there are three main action buttons: "GIVE." (highlighted in orange), "ADVOCATE." (in red), and "VOLUNTEER." (in blue). On the left side, a vertical menu lists options: "Pledge Now", "Home", "Giving History", "Leadership Levels", and "Change Password". The main content area shows a four-step process: "Step 1: Pledge Information", "Step 2: Donor Information", "Step 3: Review", and "Step 4: Complete". A "Continue →" button is located below the steps. The text "My pledge will be made the following way:" is followed by three radio button options: "Payroll Deduction" (selected, indicated by a red arrow), "Stock", and "No thanks. I do not want to contribute at this time." A yellow callout box with the text "Select Payroll Deduction and click Continue" points to the "Payroll Deduction" option. Another "Continue →" button is located at the bottom of the form, with a red arrow pointing to it.

CATERPILLAR® **LIVE UNITED** **United Way**

GIVE. **ADVOCATE.** **VOLUNTEER.**

→ Pledge Now
→ Home
→ Giving History
→ Leadership Levels
→ Change Password

Step 1: Pledge Information Step 2: Donor Information Step 3: Review Step 4: Complete

Continue →

My pledge will be made the following way:

☒ Payroll Deduction
☐ Stock
☐ No thanks. I do not want to contribute at this time.

Continue →

Select **Payroll Deduction** and click **Continue**

Option 1: Amount Per Pay Period

Select or enter amount to be deducted per pay period (*weekly, biweekly, monthly*) and click Continue

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
← Back		Continue →	



By making your pledge today you authorize the payroll contribution as marked below to begin effective pay period 1 of the 2018 calendar year. Per pay period contributions are continuous and will roll over each year until you cancel or change the deduction.

Please indicate your contribution preference.

Payroll Deduction Payment	
I would like to contribute the following amount per pay period:	
<input type="radio"/>	\$20.00 / pay period
<input type="radio"/>	\$15.00 / pay period
<input type="radio"/>	\$10.00 / pay period
<input type="radio"/>	\$5.00 / pay period
<input checked="" type="radio"/>	\$25 / pay period



Option 2: One-time Payroll Contribution

Select or enter one-time contribution amount (taken out of 1st paycheck in January 2018) and click Continue

I would like to make a one-time payroll contribution in January in the following amount:

- ☐ \$100.00
- ☐ \$75.00
- ☐ \$50.00
- ☐ \$25.00
- ☐ \$

← Back

Continue →

Pledging Stock

LIVE UNITED

GIVE.
ADVOCATE.
VOLUNTEER.

- Pledge Now
- Home
- Giving History
- Leadership Levels
- Change Password

Step 1: Pledge Information
Step 2: Donor Information
Step 3: Review
Step 4: Complete

Continue →

My pledge will be made the following way:

☐ Payroll Deduction
☒ Stock
☐ No thanks. I do not want to contribute at this time.

Continue →

Select **Stock** and click **Continue**

Enter Stock Details

CATERPILLAR®

LIVE UNITED

United Way

GIVE.

ADVOCATE.

VOLUNTEER.


[Pledge Now](#)
[Home](#)
[Giving History](#)
[Leadership Levels](#)
[Change Password](#)

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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[← Back](#)[Continue →](#)

Stock Payment

I would like to contribute the following stock(s) and/or securities:

Name of Stock	<input type="text"/>
Stock Ticker Symbol	<input type="text"/>
Number of Shares	<input type="text"/>
Estimated Share Price	<input type="text"/>
Expected Date of Transfer	<input type="text"/> 
Brokerage Firm	<input type="text"/>

[Add Stock +](#)

Please review the [stock payment instructions](#) before continuing.

[← Back](#)[Continue →](#)

- 1) Complete all fields
- 2) Click **“Add Stock +”**
- 3) Review stock payment instructions document
- 4) Click **Continue**

Stock Payment Instructions

stock payment instructions before continuing.' The link 'stock payment instructions' is underlined and highlighted with a red oval." data-bbox="329 195 660 311"/>

Advantages of donating stock

You may wish to contribute appreciated shares of stock in lieu of a cash contribution. By contributing appreciated stock that you have held for more than one year, (under current U.S. tax law) you will also benefit by receiving an income tax deduction for the full fair market value of the shares on the date of the gift.

Both you and the United Way can benefit from this arrangement. You can provide a greater dollar amount to the charity than if you were to sell the shares, pay the capital gains tax and contribute the after tax proceeds.

Please keep a few things in mind when deciding to donate stock:

- You can only donate shares that have been vested and exercised
- To receive full tax benefits, you must hold the shares for more than one year before gifting
- You should consult your tax advisor regarding your specific tax situation, as Caterpillar is not in a position to provide tax planning or advice

How to donate stock to your local United Way

If you wish to contribute stock to the Caterpillar Employee United Way Appeal, you are required to complete the following process:

- Complete the online pledge process by completing the required stock details, selecting your designation details and submitting your pledge.
- Contact your financial advisor and complete the payment process as specified in your pledge.

If you have further questions regarding the stock process please contact Mary Brown at 309-674-5181 or mary.brown@unitedway.org.

Designation Options

The default United Way listed below will be the employee's home zip code. Employees have the option to designate to a total of 4 United Ways or funded United Way agencies.

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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[← Back](#)[Continue →](#)

Based on your pay period frequency your total annual gift is **\$130.00**. Please choose how you would like to invest this donation. You may give all of your donation to one United Way, United Way partner agency or Focus Area or divide it among several. There is a \$1 minimum for a general donation to a United Way and a \$25 minimum donation per agency designation, with a maximum of 4 agency designations.

The local United Way listed below is based on your default home zip code. If you wish to designate your funds to other United Way(s) and/or partner agencies please select the option to search.


Each United Way is asked to provide and approve all qualified agencies within their organization. Please note that any non-partner agencies will be excluded from the campaign.

Donation Distribution

I would like to invest my donation using:

☒ Percentages of my donation ☐ Dollar amounts from my donation

% ***United Way Of San Diego County**



When you make a donation, you help United Way create long-lasting changes that prevent problems from happening in the first place. United Way carries out that bold vision through a community impact model that focuses on solving critical community problems.

[Learn more](#)

% ***Women United Fund**

The fund invests in the services, programs and projects that advance its mission to improve the lives of San Diego women and children.

% Total

[Click here to see a list of your local United Way partner agencies or search for other United Ways and/or partner agencies in the U.S.](#)

A new window will open with a list of non-profit organizations. Click the 'Select Agency' icon next to the organization name to add it to the list below or click on the name to learn more about it.

How to Designate to other United Way(s) or United Way Funded Agencies

<input type="text"/>	%	*Women United Fund
The fund invests in the services, programs and projects that advance its mission to improve the lives of San Diego women and children.		
<input type="text" value="0"/>	%	Total
→ Click here to see a list of your local United Way partner agencies or search for other United Ways and/or partner agencies in the U.S.		
A new window will open with a list of non-profit organizations. Click the 'Select Agency' icon next to the organization name to add it to the list below or click on the name to learn more about it.		

Select 'Click here to see a list of your local United Way partner agencies or search for other United Ways and/or partner agencies in the U.S.'

Search for United Way(s) or Agencies

Click here to see a list of your local United Way partner agencies or search for other United Ways and/or partner agencies in the U.S.

close X

Agency Name

EIN

City

State

- select state -

Zip

 with this zip ▼

Acct. Code

Search for a local United Way or partner agency. Click **Search**.

➔ search

[Home United Way Agencies](#)

Click here to see list of agencies aligned to employee's home zip code United Way

[San Diego Partner Agencies](#)

San Diego Employees: Click here to see list of agencies aligned to United Way of San Diego County

[All United Ways and Agencies](#)

Select United Way or Agency

Displaying results 1 - 20 of 33	
1 2	Next ➔
Return to Full List • San Diego Partner Agencies	
↑ select	2-1-1 San Diego San Diego, CA, United States - "2-1-1 is San Diego County's three-digit phone number for community health and disaster services inf... More...
select	Alliance for African Assistance San Diego, CA, United States - "The Alliance for African Assistance resettles and assists legal refugees from all over the world fl... More...
select	Alpha Project For The Homeless San Diego, CA, United States - The Alpha Project for the Homeless offers assistance in obtaining full-time or part-time employment ... More...
↑ select	American Academy Of Pediatrics California Chapter 3 San Diego, CA, United States - The American Academy of Pediatrics?is dedicated to achieving optimal health for all children in San ... More...
↑ select	Catholic Charities San Diego, CA, United States - "Catholic Charities provides a variety of critical services for children, adults, and families, immi... More...
↑ select	Child Development Associates Bonita, CA, United States - "Child Development Associates helps disadvantaged children receive affordable quality early educatio... More...

Click **select** next to United Way or agency to be added to your donation distribution list



Donation Distribution – Percentage or Amount


Employees can choose to designate by percentage or by dollar amount.

Minimum of \$1 per United Way and \$25 per agency designation.

Donation Distribution

I would like to invest my donation using:

☒ Percentages of my donation ☐ Dollar amounts from my donation

25	%	Children's Initiative	x
The Children's Initiative is a non-profit agency that works to improve the well-being of children and youth in San Diego County.			
25	%	2-1-1 San Diego	x
San Diego County's new three-digit phone number for community health and disaster services information and referral. Confidential ; 24/7; free; multilingual; publishes directories and handbooks; search for services online.			
50	%	*United Way Of San Diego County	
 When you make a donation, you help United Way create long-lasting changes that prevent problems from happening in the first place. United Way carries out that bold vision through a community impact model that focuses on solving critical community problems.			
Learn more			

Negative Designation and click Continue

An employee has the option to write in an agency they do not wish to have their money allocated.

% Total

→ **Click here to see a list of your local United Way agencies or search for another United Way/Non-profit.**

A new window will open with a list of non-profit organizations. Click the 'Select Agency' icon next to the organization name to add it to the list below or click on the name to learn more about it.


Negative Designations

If you have invested your gift in one or more of the above areas and do not want a particular agency to receive a portion of your gift, please indicate the agency below:



← Back

Continue →



Donor Recognition

Information on this page is optional. Employee can choose if they wish to remain anonymous by selecting the box under acknowledgements.

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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← Back

Continue →

Required: If you wish to receive a pledge confirmation receipt confirming the details of your transaction, you are required to provide a home or work email address below.

You are also required to select whether you'd like to be acknowledged by Caterpillar and/or United Way for your donation or remain anonymous.

Optional: The United Way may use your home contact information as a tool to recognize or contact donors. If you wish to remove all your existing contact information, please note that you must clear all the data existing in the Home Address and Work Address fields, including setting your Home State and Work State show as '- select state-' in order to proceed. Please carefully review your information below, make any necessary changes and click the 'Continue' button to complete the process. To make changes to your contribution, click on the 'Back' button.

Acknowledgements

- ☒ I would like to be recognized for my contribution by Caterpillar and/or United Way.
- ☐ I would like to remain anonymous for Caterpillar and/or United Way recognition.

Leadership Recognition

- ☐ I would like to include my spouse's gift for the purpose of qualifying for a leadership level.

Account Information

Username catdemo

Personal Information

First Name John

Last Name Doe

Enter Donor Information and click 'Continue'

Information on this page is optional. Employee can enter or change information in these fields.

Home Address	
Home Country	<input type="text" value="United States"/>
Home Address 1	<input type="text" value="123 Plum"/> (optional)
Home Address 2	<input type="text"/> (optional)
Home City	<input type="text" value="San Diego"/> (optional)
Home State	<input type="text" value="California"/> (optional)
Home Zip Code	<input type="text" value="92123"/> <input type="text"/> (optional)

Work Contact Information	
Work Email Address	<input type="text" value="Doe_John_C@solarturbines"/> (optional)
or	
Phone Number 1	<input type="text"/> (optional)
Phone Number 2	<input type="text"/> (optional)
Fax Number	<input type="text"/> (optional)

Work Address	
Work Country	<input type="text" value="United States"/>
Work Address 1	<input type="text"/> (optional)
Work Address 2	<input type="text"/> (optional)
Work City	<input type="text"/> (optional)
Work State	<input type="text" value="- select state -"/> (optional)
Work Zip Code	<input type="text"/> <input type="text"/> (optional)

Preferred Mailing Address	
<input type="radio"/> Home <input checked="" type="radio"/> Work	

← Back

Continue →

Review Pledge Information and click 'Submit Contribution'

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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[← Back](#)[Submit Contribution →](#)

Please review your pledge contribution summary below, using the "edit" buttons to make any necessary changes. If you are satisfied, please click "Submit Contribution" to complete this process. You will then have the opportunity to print your certificate.

Please note: You are able to log back into the online pledge system and update/edit your pledge contribution until the campaign closes on September 1, 2017.

edit

Personal Information

Name	Demo Donor Solar
Home Address	123 Plum, San Diego, CA 92123 US
Home Phone	
Home Email	kempf_erika_c@cat.com
Work Address	
Work Phone	
Work Email	Kempf_erika_c@cat.com

Acknowledgements

☒ I would like to be recognized for my contribution by Caterpillar and/or United Way.

☐ I would like to remain anonymous for Caterpillar and/or United Way recognition.

edit

Transaction

Status	Pending
Payment Type	Per Pay Period Payroll Deduction
Pledge	\$130.00
Payment Detail	\$5.00 x 26 pay periods = \$130.00
Total Annual Amount	\$130.00

edit

Charity Details

100.00 % *United Way Of San Diego County

[← Back](#)[Submit Contribution →](#)

Thank You Certificate and Pledge Receipt

***All employees who take some sort of action (pledge \$1+ or opt out) will have access to print the generic 'thank you' certificate**

After completing online pledge form, employees can:

1. Print this final page 'Thank you for your participation certificate' if needed for business unit raffles/drawings (only includes name & Employee ID)

-Right click mouse
-Select Print

2. Print pledge summary (includes pledge/dollar amount)


-Click 'Print pledge summary'
-Select Print

***Please note:** Employee will also receive a confirmation email that contains pledge summary details and generic participation certificate.

Step 1: Pledge Information | Step 2: Donor Information | Step 3: Review | **Step 4: Complete**

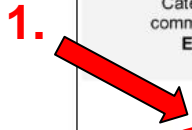
[← Back](#) [Print pledge summary ↑](#) [Logout →](#)

Thank You!




THANK YOU FOR CHANGING LIVES!

Caterpillar and the United Way share a common goal—to improve lives, invest in our community and to create a better tomorrow. Thank you for participating in the Caterpillar Employee United Way Appeal—together we are making progress possible!

1.  Thank You, Demo Donor Solar (solar2015), for participating in the United Way Campaign. Please note that a confirmation email will be sent to you at the email address provided shortly. You may also print a confirmation for your records by clicking on "Print Pledge Summary". Be sure to print this "Thank you certificate" as many employee groups ask for the certificate to participate in raffles and events.

[Click here to take survey](#)

 2. [Print pledge summary ↑](#) [Logout →](#)

[← Back](#) [Print pledge summary ↑](#) [Logout →](#)

Confirmation Email

Employee will receive a confirmation email that includes:

- Pledge summary details
- Link to be taken to certificate of participation



Thank you for participating in the Caterpillar Employee United Way Appeal!

The CEUWA Campaign to: Kempf_Erika_C

Please respond to CEUWA_Cat

06/28/2017 12:03 PM

[Show Details](#)

Caterpillar: Confidential Green

Retain Until: 07/28/2017



Dear Demo Donor Solar,

Thank you for your Payroll Deduction gift of \$130.00 to the Caterpillar Employee United Way Appeal, which will be matched dollar-for-dollar by the Caterpillar Foundation! With one gift to United Way, you will touch the lives of many individuals and families. Thank you for helping to create lasting changes that ripple out to the community as a whole!

For confirmation purposes, the following information has been processed per your instructions (payroll deductions will start your first paycheck in January 2018):

100.00% to *United Way Of San Diego County

[Click here](#) to access your certificate of participation.



Sincerely,

The Caterpillar Employee United Way Appeal (CEUWA) Team & the United Way

[Click here to take survey](#)



THANK YOU FOR CHANGING LIVES!

Caterpillar and the United Way share a common goal—to improve lives, invest in our community and to create a better tomorrow. **Thank you for participating in the Caterpillar Employee United Way Appeal—together we are making progress possible!**

Employee Name (print) _____

Employee ID or Badge Number: _____

