

2017-2018 Online Pledging Process Retirees



GIVE. ADVOCATE. VOLUNTEER. UnitedWay.org

Accessing eWay

• <u>First time users</u>: If this is your first time pledging online, please click on the 'Register' link to create a Username and Password.

• <u>Returning users</u>: If you pledged last year, please enter the **username** and **password** that was sent to you in the email communication and click **Login**.

CATER	PILLAR [®]	
GIVE.		ADVOCATE. VOLUNTEER.
 Pledge Now Home Leadership Levels 	Welcome to the Caterpillar Retiree United Way App the site please click on the "Register" link to create Login Information Username Password	your username and password.
	→ Login → Register	First time users: Click Register link
	Forgot Password?	



New User Registration

Create Username, Password, Personal Information and Contact Information

- Create Username
- Create Password
- Confirm Password
- Create Security Question
- Enter First & Last Name
- Enter Email Address
- Enter PeopleSoft ID, Bucyrus ID, or Solar badge number
- Enter Home Address
- Click Register link at bottom corner
- If you do not know your ID number, please contact Erika Kempf at 309-675-1475 or Kempf_Erika_C@cat.com

Preferred Username	Account Informa	tion
Your new password must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: %, or any white-space. Password Examples abcdef2 - valid, contains letters and numbers pa\$\$word - valid, contains letters and special characters 1234567# - valid, contains only letters abcdef2 - invalid, contains only letters abc23 - invalid, contains only letters abc23 - invalid, less than 6 characters Password	Preferred Username	
abcdefg2 -valid, contains letters and numbers pa\$\$word -valid, contains numbers and special characters 1234567# -valid, contains numbers and special characters abcdefgh -invalid, contains numbers and special characters abc23 - invalid, contains only letters abc23 - invalid, less than 6 characters Password	Your new password r character from 2 of th	nust be between 6 and 15 characters in length and contain at least 1 e groups of alpha, numeric, or special characters. Your Password may not
pa\$\$word - valid, contains letters and special characters 1234567# - valid, contains numbers and special characters abcdefgh - invalid, contains only letters abc23 - invalid, less than 6 characters Password	Password Examples	
1234567# - valid, contains numbers and special characters abcdefgh - invalid, contains only letters abc23 - invalid, less than 6 characters Password	abcdefg2 - va	lid, contains letters and numbers
abcdefgh invalid, contains only letters abc23 - invalid, less than 6 characters Password Confirm password Enter a security question to which only you know the answer. You will be asked this question should you forget your password. Security Question Security Answer Confirm Security Answer Confirm Security Answer Confirm Security Answer Personal Information First Name Last Name Email Address PeopleSoft/Bucyrus/Solar ID Home Address 1 Home Address 2 Home Address 2 Home Address 2 Home City Home State	pa\$\$word - va	lid, contains letters and special characters
abc23 - invalid, less than 6 characters Password		
Password Confirm password Confirm password Enter a security question to which only you know the answer. You will be asked this question should you forget your password. Security Question Security Answer Confirm Con	-	
Confirm password	abc23 - inv	valid, less than 6 characters
Enter a security question to which only you know the answer. You will be asked this question should you forget your password. Security Question Security Answer Confirm Security Confirm Security Confirm Conf	Password	
should you forget your password. Security Question Security Answer Confirm Security Answer Confirm Security Answer Personal Information First Name Last Name Last Name Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Country United States (optional) Home Address 2 (optional) Home City Home State • select state - •	Confirm password	
Security Answer Confirm Security Answer Confirm Security Answer Personal Information First Name Last Name Last Name Email Address Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Locational (optional) Home City Home State State -		
Confirm Security Answer Personal Information First Name Last Name Last Name Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home Address 2 Home City Home State • select state - •	Security Question	
Personal Information First Name Last Name Email Address Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home Address 2 Home Address 2 Home Address 4 Home State	Security Answer	
First Name Last Name Email Address Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home Address 2 Home Address 2 Home State	Confirm Security Answ	/er
First Name Last Name Email Address Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home Address 2 Home Address 2 Home State		
Last Name Last Name Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home Address 2 Home City Home City Home State • select state - •	Personal Informa	ition
Email Address PeopleSoft/Bucyrus/Solar ID Home Address Home Country United States Home Address 1 Home Address 2 Home City Home City	First Name	
PeopleSoft/Bucyrus/Solar ID Home Address Home Address 1 Home Address 2 Home City Home State	Last Name	
Home Address Home Country United States Home Address 1 Home Address 2 Home City Home State • select state - •	Email Address	
Home Country United States Home Address 1 Home Address 2 Home City Home State • select state -	PeopleSoft/Bucyrus/S	plar ID
Home Country United States Home Address 1 Home Address 2 Home City Home State • select state -		
Home Address 1 (optional) Home City Home State -	Home Address	
Home Address 2 (optional) Home City Home State - select state -	Home Country	United States •
Home City Home State - select state -	Home Address 1	
Home State - • • • • • • • • • • • • • • • • • •	Home Address 2	(optional)
	Home City	
Home Zip Code	Home State	- select state -
	Home Zip Code	



Pledge Now Click on 'Pledge Now' link

GIVE.		ADVO	CATE. VOLUNTEER.
 Pledge Now Home Giving History Leadership Levels Change Password 	Welcome Jane Doe CATERPILLAR EMP	NITED WAY APPEAL Way Way	
		NITED WAY? N ALIGNS WITH CATERPILLAR'S VALUES	
	CATERPILLAR*	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	Supports organizations making a difference in education,	



Pledging Options

Retirees have 5 pledging options:

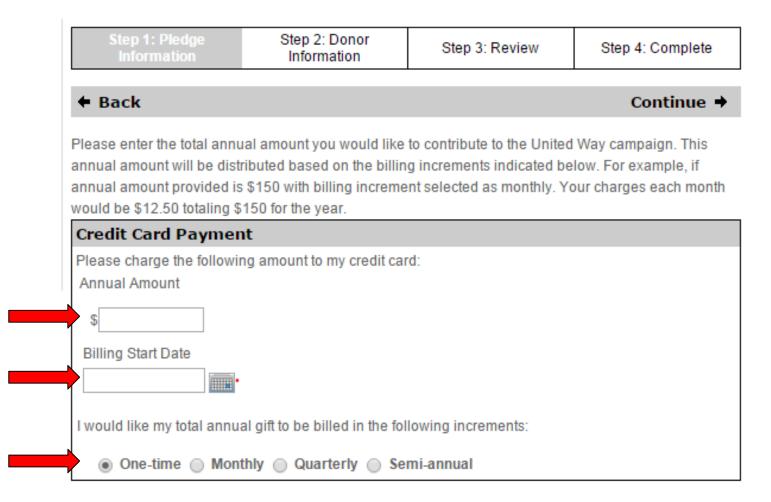
Credit Card, Community Foundation, Check, Debit Card or Stock

GIVE.	ADVOCATE. VOLUNTEER.
✤ Pledge Now ✦ Home	Step 1: Pledge Information Step 2: Donor Information Step 3: Review Step 4: Complete
 Leadership Levels Change Password 	Continue → If you would like to make your pledge in more than one form of payment please complete one payment process, submit and return to the pledging site and add another payment choice.
	My pledge will be made the following way: Credit Card Community Foundation Check Debit Card
	Stock Continue →



Credit/Debit Card Option

Enter the total annual amount you would like to contribute. Select the billing start date and how often you would like the deductions made.





Credit/Debit Card Option

Enter all required credit/debit card information and select Continue.

Credit Card Information		
Card Type	- select -	
Card Number		
Card Verification Number	what is this?	
Name On Card		
Expiration Date (mm/yy)		
Contact Email Address	(option	al)
Billing Address	copy from home address	
Country	United States	
Address 1		
Address 2		(optional)
City		
State	- select state -	•
Zip Code		
qoZFNA		
Enter the text above exactly as sho	wn:	

Back

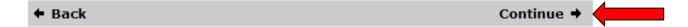
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Continue 🗕

Community Foundation Option

Enter total annual amount and select Continue.

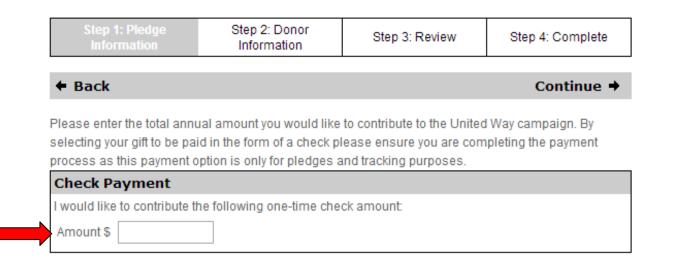
Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete		
+ Back			Continue 🕈		
Please enter the total annual amount you would like to contribute to the United Way campaign. By selecting your gift to be made through a local Community Foundation please ensure you are completing the payment process as this payment option is only for pledges and tracking purposes.					
Community Foundation Payment					
I would like to contribute the following amount:					
Amount \$					

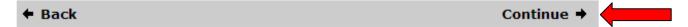




Check Option

Enter total annual amount that you will pay by check and select Continue.







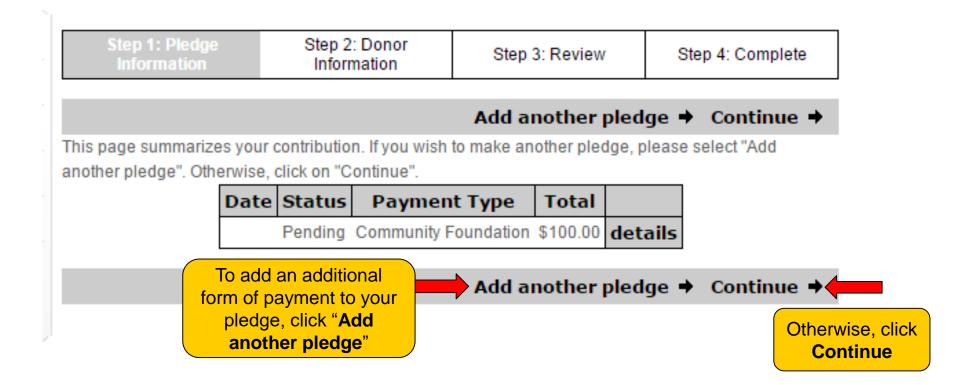
Stock

Stock Option

CATER	PILLAR [®]		LI	VE L	INITE	United 🛞
GIVE.					ADVOCATE.	VOLUNTEER.
Pledge Now		ep 2: Donor nformation	Step 3: Review	Step 4: C	omplete	
 Home Giving History 	+ Back			Con	tinue 🕈	
✦ Leadership Levels	Stock Payment					
✦ Change Password	I would like to contribute the follo Name of Stock			1) 2) 3) 4)	Review st	d Stock +" ock payment os document
	Please review the stock payment	t <u>instructions</u> efor	e continuing.	Con	tinue 🔸 🛑	



Multiple Forms of Payment for Pledge





Designation Options

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

Please choose how your total annual gift of \$300.00 is invested. Please choose how you would like to invest this donation. You may give all of your donation to one organization 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 agencies please select the option to search.

You may direct your gifts to support a United Way or United Way partner agency. 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 Dis	tribution
I would like to in	vest my donation using:
Percentage	es of my donation 🔍 Dollar amounts from my donation
	% United Way of Pontiac
	The best way to give and make a difference! Giving to United Way of Pontiac ensures that your gift will have the most impact in your community. By combining your gift with thousands of others United Way is able to achieve long term change in improving people's lives.
	% Readiness to Succeed in School
	United Way of Pontiac provides opportunities for our community's youth to be involved in community service projects and develop leadership skills.
0	% Total
	e to see a list of your local United Way agencies or search for Inited Way/Non-profit.
	vill open with a list of non-profit organizations. Click the 'Select Agency' icon next to name to add it to the list below or click on the name to learn more about it.
Negative De	signations
-	ted your gift in one or more of the above areas and do not want a particular agency ion of your gift, please indicate the agency below:
to receive a port	ion of your gin, prease indicate the agency below.



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

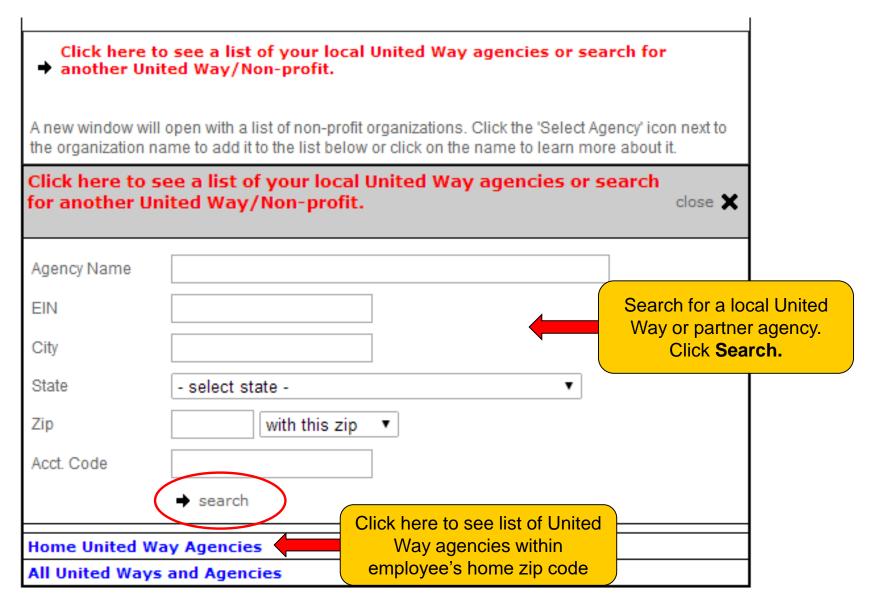
Donation Distribution	
I would like to invest my donation using:	
Percentages of my donation Ollar amounts from my donation	
% United Way of Pontiac	
The best way to give and make a difference! Giving to United Way of Pontiac ensures that your gift will have the most impact in your community. By combining your gift with thousands of others United Way is able to achieve long term change in improving people's lives.	
% Readiness to Succeed in School United Way of Pontiac provides opportunities for our community's youth to be involved in community service projects and develop leadership skills.	
0 % Total	Select 'Click here to see a list of your local United
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	Way agencies or search for another United Way / Non-profit'
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:



Search for United Way(s) or Agencies



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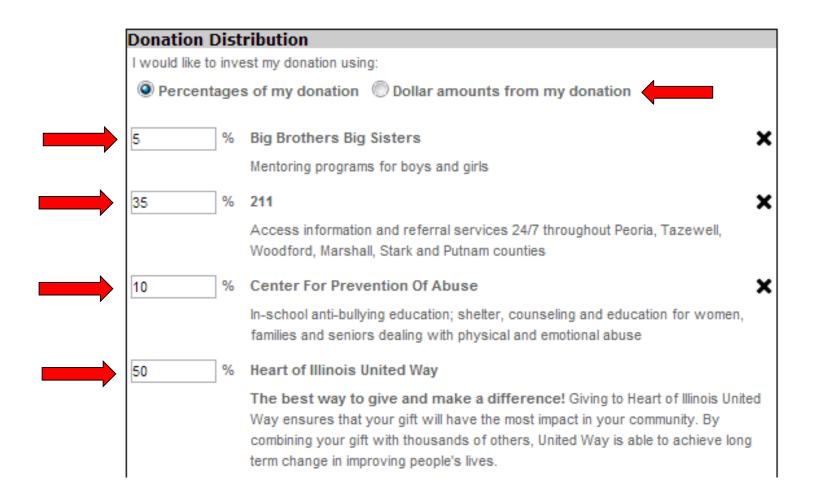
Select United Way or Agency

	Agency Name		
	EIN		
	City	Fargo	
	State	North Dakota	
	Zip	with this zip 🔻	
Click select next t United Way or agend		➡ search	
be added to your		Displaying results 1 - 20 of 39	
donation distribution	list	1 2	Next 🔶
	Return to Full	List • Search Results	
	▲ select Farg	ed Way of Cass-Clay o, ND, United States - United Way of Cass-Clay connects people to peop sources, and experts to advocates to e	le, needs
	▲ select Farg	rehouse, Inc. o, ND, United States - Women's Empowerment (WE) Program Women's owerment program's focus is to develop effective gende e	
		o Adult Learning Center o, ND, United States e	
		Scouts Pine to Prairie Council o, ND, United States - Youth Enrichment e	
		e & Abuse Crisis Center o, ND, United States - Domestic Violence Legal Advocacy Sexual Assault a	



Donation Distribution – Percentage or Amount

Retirees can choose to designate by percentage or by dollar amount. Minimum of \$1 per United Way and \$25 per agency designation.





Negative Designation and click Continue

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

 100
 % 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. Retiree 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

Back

Continue 🕈

Providing this information is optional.

The United Way may use home contact information as a tool to recognize and contact donors.

Optional: Please carefully review your information below. To make changes enter the information below 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.



Enter Donor Information and click 'Continue' Information on this page is optional. Retiree can enter or change information in these fields.

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

Account Information				
Username	retiree	etiree		
Personal Information				
First Name	Caterpillar			
Last Name	Retiree			
Email Address	kempf_erika_c@cat.com			
PeopleSoft/Bucyrus/Solar ID	0584324			

Home Address				
Home Country	United States			
Home Address 1	210 N Plum			
Home Address 2	(optional)			
Home City	Pontiac			
Home State	Illinois 🔹			
Home Zip Code	61764			

Continue

Review Pledge Information and click 'Submit Contribution'

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete	
🕈 Back		Submit Contribution 🕈		
atisfied, please click "Sul pportunity to print your re	omit Contribution" to comp eccipt.	the "Edit" buttons to make a plete this process. You will th		
edit Personal Info	ormation			
Name Caterpillar Retiree				
Home Address 210 N P	lum, Pontiac, IL 61764 US	S		
Acknowledgement	s			
	2 ,	n by Caterpillar and/or Unite ar and/or United Way recogn		
edit Transaction				
Status Pending				
Payment Type Check				
Pledge \$150.00				
edit Charity Detai	ls			

100.00 % United Way Of Livingston County



Print Pledge Receipt and Logout

Retirees can print their pledge summary. Retirees will also receive an email with their pledge summary details and certificate to the email address provided.

Please note: If your pledge was made in the form of check, stock or Community Foundation, please mail all payments to Mary Brown at Heart of Illinois United Way who manages the Caterpillar campaign payment process for the entire United States.

Address:

Mary Brown 509 W. High Street Peoria, IL 61606





Confirmation Email

Retiree will receive a confirmation email that includes pledge summary details.



Thank you for participating in the Caterpillar Employee United Way
Appeal!
The CEUWA Campaign to: Kempf_Erika_C 07/13/2016 02:02 PM
Please respond to CEUWA Cat Show Details

Caterpillar: Confidential Green

Retain Until: 08/12/2016



Dear Caterpillar Retiree,

Thank you for your Check gift of \$150.00 to the Caterpillar Employee United Way Appeal, which will be matched dollar-for-dollar by the Caterpillar Foundation! For confirmation purposes, the following information has been processed per your instructions:

100.00% to United Way Of Livingston 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

