

2017-2018 Online Pledging Process Retirees

Accessing eWay

- **First time users**: If this is your first time pledging online, please click on the ‘**Register**’ link to create a Username and Password.
- **Returning users**: If you pledged last year, please enter the **username** and **password** that was sent to you in the email communication and click **Login**.

The screenshot displays the Caterpillar Live United website interface. At the top left is the Caterpillar logo, and at the top right is the 'LIVE UNITED' banner with the United Way logo. Below the banner are three buttons: 'GIVE.' (orange), 'ADVOCATE.' (red), and 'VOLUNTEER.' (blue). On the left side, there is a navigation menu with links for 'Pledge Now', 'Home', and 'Leadership Levels'. The main content area features a welcome message: 'Welcome to the Caterpillar Retiree United Way Appeal campaign site. If this is your first time visiting the site please click on the "Register" link to create your username and password.' Below this message is a 'Login Information' box containing 'Username' and 'Password' input fields, and two buttons: 'Login' and 'Register'. A red arrow points from a yellow callout box to the 'Register' button. The callout box contains the text: 'First time users: Click Register link'. Below the 'Login' and 'Register' buttons is a link for '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

Account Information

Preferred Username

Enter a password and then retype the password to ensure that it has been entered correctly. 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

abcdefg2	- valid, contains letters and numbers
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

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

Personal Information

First Name

Last Name

Email Address

PeopleSoft/Bucyrus/Solar ID

Home Address

Home Country

Home Address 1

Home Address 2 (optional)

Home City

Home State

Home Zip Code

→ Register

Pledge Now

Click on 'Pledge Now' link

The screenshot shows the Caterpillar Live United website interface. At the top left is the Caterpillar logo, and at the top right is the 'LIVE UNITED' banner with the United Way logo. Below the banner are three buttons: 'GIVE.' (highlighted in orange), 'ADVOCATE.' (in red), and 'VOLUNTEER.' (in blue). A navigation menu on the left contains links for 'Pledge Now', 'Home', 'Giving History', 'Leadership Levels', and 'Change Password'. A red arrow points to the 'Pledge Now' link. The main content area features a 'Welcome Jane Doe' message and a '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 features 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 features the 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' logo and two icons: a head with gears and a globe icon with the text 'Goes beyond temporary fixes to create lasting change that lifts up entire communities around the world.' and a ribbon and apple icon with the text 'Supports organizations making a difference in education, income & health.'

Pledging Options

Retirees have 5 pledging options:

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

The screenshot shows a web interface for making a pledge. At the top, there are three tabs: 'GIVE.' (highlighted in orange), 'ADVOCATE.' (red), and 'VOLUNTEER.' (blue). On the left, a sidebar menu contains links for 'Pledge Now', 'Home', 'Leadership Levels', and 'Change Password'. The main content area features a progress bar with four steps: 'Step 1: Pledge Information', 'Step 2: Donor Information', 'Step 3: Review', and 'Step 4: Complete'. Below the progress bar is a 'Continue' button with a right-pointing arrow. A text block explains that multiple payment methods can be added by returning to the site. Below this, a section titled 'My pledge will be made the following way:' lists five radio button options: 'Credit Card', 'Community Foundation', 'Check', 'Debit Card', and 'Stock'. A yellow callout box with a red arrow points to the 'Credit Card' option, containing the text 'Select payment type and click Continue'. At the bottom of the form is another 'Continue' button with a right-pointing arrow.

Select payment type and click **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.

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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Please enter the total annual amount you would like to contribute to the United Way campaign. This annual amount will be distributed based on the billing increments indicated below. For example, if annual amount provided is \$150 with billing increment selected as monthly. Your charges each month would be \$12.50 totaling \$150 for the year.


Credit Card Payment

Please charge the following amount to my credit card:

Annual Amount

\$

Billing Start Date




I would like my total annual gift to be billed in the following increments:

One-time Monthly Quarterly Semi-annual

Credit/Debit Card Option

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



Credit Card Information

Card Type

Card Number

Card Verification Number what is this?

Name On Card

Expiration Date (mm/yy)

Contact Email Address (optional)

Billing Address

Country


Address 1

Address 2 (optional)

City

State


Zip Code



Enter the text above exactly as shown:

[← Back](#)

[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
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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 \$



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Continue →



Check Option

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

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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Please enter the total annual amount you would like to contribute to the United Way campaign. By selecting your gift to be paid in the form of a check please ensure you are completing the payment process as this payment option is only for pledges and tracking purposes.

Check Payment

I would like to contribute the following one-time check amount:


Amount \$




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Stock Option



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

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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**

Multiple Forms of Payment for Pledge

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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Add another pledge → Continue →

This page summarizes your contribution. If you wish to make another pledge, please select "Add another pledge". Otherwise, click on "Continue".

Date	Status	Payment Type	Total	
	Pending	Community Foundation	\$100.00	details

Add another pledge → Continue →

To add an additional form of payment to your pledge, click **"Add another pledge"**

Otherwise, click **Continue**

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 Distribution

I would like to invest my donation using:

Percentages 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.

% 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 →

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 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.

% 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.

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

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

→ [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.

[Click here to see a list of your local United Way agencies or search for another United Way/Non-profit.](#)

close ✕

Agency Name

EIN

City

State

Zip

 with this zip ▼

Acct. Code

→ search

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

[Home United Way Agencies](#)

[All United Ways and Agencies](#)

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

Select United Way or Agency

Agency Name

EIN

City

State

Zip with this zip

Address

Displaying results 1 - 20 of 39

1 2

[Return to Full List](#) • Search Results

<input type="button" value="↑ select"/>	United Way of Cass-Clay Fargo, ND, United States - United Way of Cass-Clay connects people to people, needs to resources, and experts to advocates to... More...
<input type="button" value="↑ select"/>	Sharehouse, Inc. Fargo, ND, United States - Women's Empowerment (WE) Program Women's Empowerment program's focus is to develop effective gende... More...
<input type="button" value="↑ select"/>	Fargo Adult Learning Center Fargo, ND, United States More...
<input type="button" value="↑ select"/>	Girl Scouts Pine to Prairie Council Fargo, ND, United States - Youth Enrichment More...
<input type="button" value="↑ select"/>	Rape & Abuse Crisis Center Fargo, ND, United States - Domestic Violence Legal Advocacy Sexual Assault More...

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



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.

Donation Distribution

I would like to invest my donation using:

Percentages of my donation Dollar amounts from my donation

<input type="text" value="5"/>	%	Big Brothers Big Sisters Mentoring programs for boys and girls	X
<input type="text" value="35"/>	%	211 Access information and referral services 24/7 throughout Peoria, Tazewell, Woodford, Marshall, Stark and Putnam counties	X
<input type="text" value="10"/>	%	Center For Prevention Of Abuse In-school anti-bullying education; shelter, counseling and education for women, families and seniors dealing with physical and emotional abuse	X
<input type="text" value="50"/>	%	Heart of Illinois United Way The best way to give and make a difference! Giving to Heart of Illinois United Way 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.	

Negative Designation and click Continue

A retiree 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. 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
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← 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

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

← 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 entire contribution below, using the "Edit" buttons to make any changes. If you are satisfied, please click "Submit Contribution" to complete this process. You will then have the opportunity to print your receipt.

edit Personal Information
Name Caterpillar Retiree
Home Address 210 N Plum, Pontiac, IL 61764 US
Acknowledgements
<input checked="" type="checkbox"/> I would like to be recognized for my contribution by Caterpillar and/or United Way.
<input type="checkbox"/> I would like to remain anonymous for Caterpillar and/or United Way recognition.

edit Transaction
Status Pending
Payment Type Check
Pledge \$150.00
edit Charity Details
100.00 % United Way Of Livingston County

[← Back](#)

[Submit Contribution →](#)



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

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

Thank You, Caterpillar Retiree (retiree2016), 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".

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 campaigns payment process for the entire United States.

Mary Brown
509 W. High Street
Peoria, IL 61606

[Click here to take survey](#)

← Back Print pledge summary ↑ Logout →

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](#)