

2017 Online Pledging Process

U.S. & ISE Caterpillar Payroll Employees



United Way Campaign Underway

Employee Notifications

- Active full and part-time U.S. and ISE's with active CAT email addresses will receive an email the morning of **August 7, 2017** from **CEUWA_cat@cat.com**.
 - Reminder emails will automatically be sent each following Monday if employee hasn't taken some sort of action (opt in/opt out) as well as final reminder on 8/31
- E-mail will provide a "**Click here**" link to access the online pledging site and log in with CWS ID and password. All employees can also access the pledge link by visiting www.caterpillar.com/unitedway.
- Production Employees can also utilize a separate pledging link (found at www.caterpillar.com/unitedway) that allows employees to log into the pledging site using:
 - Employee's 7-digit **PeopleSoft ID number** as a Username (Example: 0123456)
 - Default password set to the employee's **First and Last initial** (capitalized) and **home zip code** (Example: AN61615)
 - Upon logging into the system, the employee will have the opportunity to reset their password.

Accessing eWay – CWS Login

The employee will need their Corporate Web Security (CWS) ID and password.

Corporate Web Security



CWS ID

CWS ID



Password

Password



Change Password / Profile



Login

[Forgot Password?](#)

English



Enter CWS ID and
Password and click
Login

After login you will be forwarded to:

<https://fedlogin.cat.com:443/idp/e3OLX/resumeSAML20/idp/startSSO.ping>

Accessing eWay - Production Employee Login

Employees will log in with 7-digit PeopleSoft ID as Username. Default password is set to employee's first and last initial (capitalized) and home zip code.

Log-In to Your Campaign



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

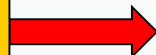
Username
Password

→ Login

Employee will have opportunity to reset password immediately after logging in

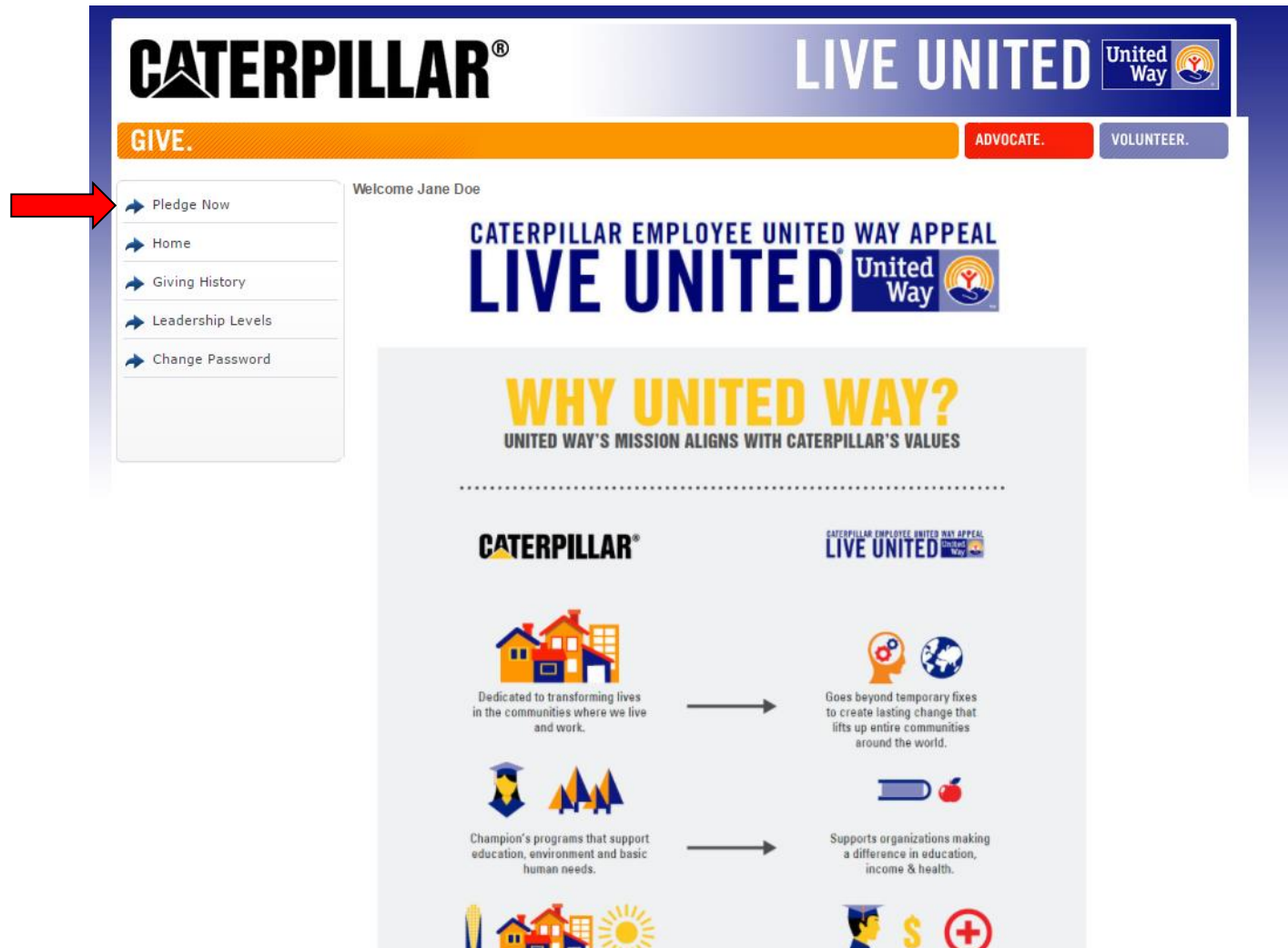
Example:

Username – 0123457
Password – AP61614




Pledge Now

Click on 'Pledge Now' link




The screenshot displays the Caterpillar Live United website interface. At the top, the Caterpillar logo and 'LIVE UNITED' text are prominent, alongside the United Way logo. Below this, a navigation bar features three buttons: 'GIVE.' (highlighted in orange), 'ADVOCATE.', and 'VOLUNTEER.'. A sidebar menu on the left contains links: 'Pledge Now' (indicated by a red arrow), 'Home', 'Giving History', 'Leadership Levels', and 'Change Password'. The main content area welcomes 'Jane Doe' and features the 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' header. Below this, a section titled 'WHY UNITED WAY?' explains the alignment of Caterpillar's values with United Way's mission. This is illustrated through two rows of icons and text: the first row shows 'Dedicated to transforming lives in the communities where we live and work.' leading to 'Goes beyond temporary fixes to create lasting change that lifts up entire communities around the world.', and the second row shows 'Champion's programs that support education, environment and basic human needs.' leading to 'Supports organizations making a difference in education, income & health.'


CATERPILLAR® **LIVE UNITED** 


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


Welcome Jane Doe


CATERPILLAR EMPLOYEE UNITED WAY APPEAL
LIVE UNITED 


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

If employee pledged in 2016, previous pledge summary will appear:

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

The screenshot shows a web portal interface for managing a donation pledge. At the top, there is an orange navigation bar with the word "ADVOCATE." in a red box. Below this is a progress bar with four steps: "Step 1: Pledge Information" (highlighted), "Step 2: Donor Information", "Step 3: Review", and "Step 4: Complete". A "Continue →" button is located to the right of the progress bar. The main content area is titled "Pledge Summary" and contains the following information:

Please carefully review your donation information below.

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

Pledge 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 "Continue with my pledge as shown" option. A yellow callout box with a black border contains the text: "Review last year's pledge summary, select your Pledge Option and click **Continue**". A red arrow points to the "Continue →" button at the bottom right of the form.

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 3 options for payroll deduction:

Amount per pay period, One-time payment, or Percentage of annual salary

The screenshot displays the Caterpillar Live United website interface for making a pledge. At the top, the Caterpillar logo is on the left, and 'LIVE UNITED' with the United Way logo is on the right. Below this is a navigation bar with 'GIVE.' in an orange box, 'ADVOCATE.' in a red box, and 'VOLUNTEER.' in a blue box. On the left side, there is a sidebar menu with links: 'Pledge Now', 'Home', 'Giving History', 'Leadership Levels', and 'Change Password'. The main content area shows a progress bar with four steps: 'Step 1: Pledge Information' (highlighted), 'Step 2: Donor Information', 'Step 3: Review', and 'Step 4: Complete'. Below the progress bar, a grey bar contains a 'Continue →' button. 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 on the right says 'Select Payroll Deduction and click Continue'. At the bottom, another grey bar contains a 'Continue →' button, which is also indicated by a red arrow.

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
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← 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

☐ \$

I would like to contribute the following percentage of my annual salary:

☐ 2.00 %

☐ 1.00 %

☐ 0.60 %

☐ 0.40 %

☐ %

← Back

Continue →

Option 3: Percentage of Annual Salary

Select or enter percentage of annual salary to contribute and click Continue


I would like to contribute the following percentage of my annual salary:


- ☐ 2.00 %
- ☒ 1.00 %
- ☐ 0.60 %
- ☐ 0.40 %
- ☐ %

← 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**

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


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

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

← BackContinue →

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"/>

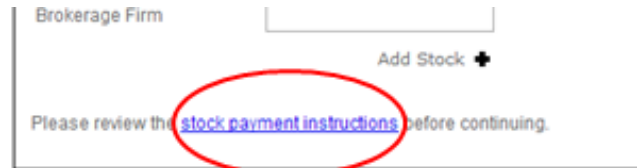
Add Stock +

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

← BackContinue →

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

Stock Payment Instructions



Brokerage Firm

Add Stock +

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



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.

[➔ 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 →](#)

Based on your pay period frequency your total annual gift is \$390.00. 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

% 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.

% Education
United Way funds education programs to help youth and adults achieve their full potential.

% Health
United Way funded health programs provide prevention, intervention and education leading to health and wellness.

% Income
United Way funded income programs promote financial stability and independence.

% Total



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

% **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.

% **Education**

United Way funds education programs to help youth and adults achieve their full potential.

% **Health**

United Way funded health programs provide prevention, intervention education leading to health and wellness.

% **Income**

United Way funded income programs promote financial stability and independence.

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

Zip with this zip

Acct. Code

[Home United Way Agencies](#)

[All United Ways and Agencies](#)

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

Click here to see list of United Way agencies that are funded by the employee's **home zip code United Way**

Select United Way or Agency

Agency Name	<input type="text"/>
EIN	<input type="text"/>
City	<input type="text" value="Fargo"/>
State	<input type="text" value="North Dakota"/>
Zip	<input type="text"/> with this zip <input type="text"/>
<input type="button" value="→ search"/>	

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

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

15	%	Big Brothers Big Sisters	x
Mentoring programs for boys and girls			
20	%	211	x
Access information and referral services 24/7 throughout Peoria, Tazewell, Woodford, Marshall, Stark and Putnam counties			
25	%	Center For Prevention Of Abuse	x
In-school anti-bullying education; shelter, counseling and education for women, families and seniors dealing with physical and emotional abuse			
40	%	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

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 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.


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 City	<input type="text" value="Pontiac"/>	(optional)
Home State	<input type="text" value="Illinois"/>	(optional)
Home Zip Code	<input type="text" value="61550"/>	(optional)

Work Contact Information

Work Email Address (optional)

or

Phone Number 1 (optional)

Phone Number 2 (optional)

Fax Number (optional)

Work Address

Work Country

Work Address 1 (optional)

Work Address 2 (optional)

Work City (optional)

Work State (optional)

Work Zip Code (optional)

Preferred Mailing Address

☐ Home ☒ Work

[← Back](#)

[Continue →](#)

Review Pledge Information and click 'Submit Contribution'

[➔ 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](#)[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 Ms. Jane Doe
Home Address 210 N Plum, Nashville, TN 37228 US
Home Phone
Home Email janedoe@gmail.com
Work Address Please update, Nashville, TN 37228 US
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 \$120.00
Payment Detail \$10.00 x 12 pay periods = \$120.00
Total Annual Amount \$120.00

[edit](#) **Charity Details**

100.00 % United Way of Metropolitan Nashville

[← 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 for participating' 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 & PeopleSoft ID)

- Right click mouse
- Select Print

2. Print pledge summary for own records (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
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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!**

1. 

Thank You, John Doe (catdemo), 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. 

← 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 for raffles/drawings (employee can print certificate and write Name & PeopleSoft ID)



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

The CEUWA Campaign to: Kempf_Erika_C

Please respond to CEUWA_Cat

06/27/2017 03:07 PM

[Show Details](#)

Caterpillar: Confidential Green

Retain Until: 07/27/2017




Dear Jane Doe,

Thank you for your Payroll Deduction gift of \$120.00 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):

50.00% to Heart of Illinois United Way, 50.00% to Neighborhood House Association

 [Click here](#) to access your certificate of participation. Please be sure to write your name and PeopleSoft ID on the certificate before turning it in for offered raffles and drawings.

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) _____

PeopleSoft ID #: _____

