

# 2018 Online Pledging Process Progress Rail 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 6, 2018 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 6-digit Employee ID number

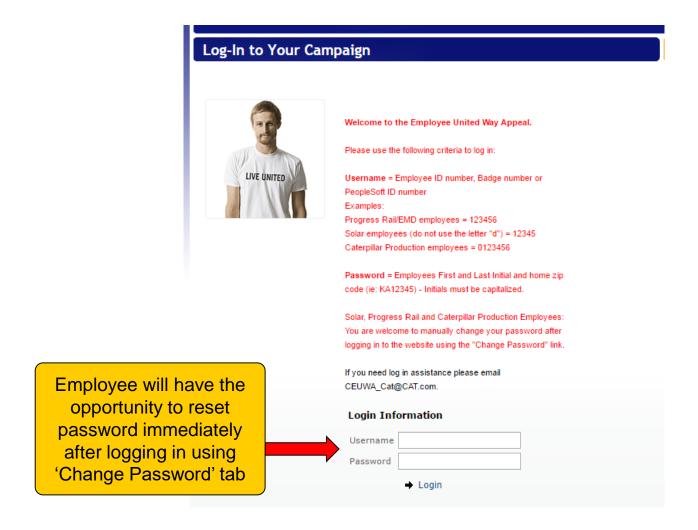
Password: Employee's first and last initial (capitalized) and home zip code

 Employees without active email addresses will have access to the pledge link via www.caterpillar.com/unitedway



### **Accessing eWay**

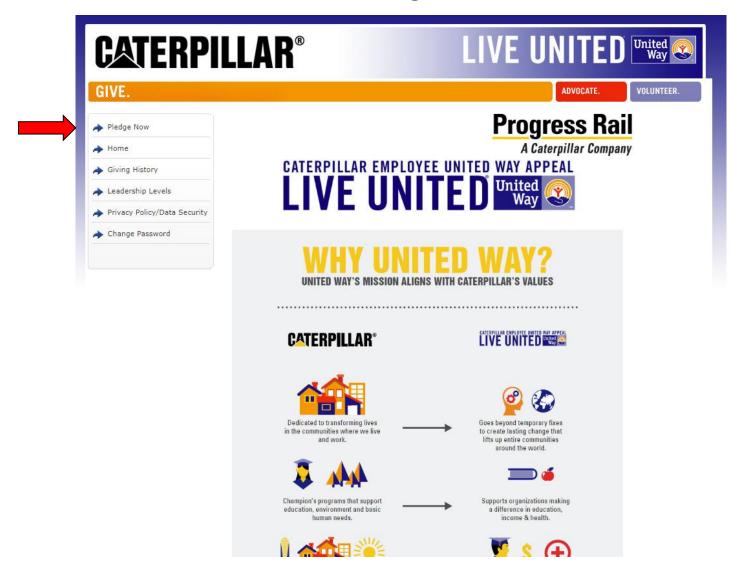
Employees will log in with employee ID number as the username. Default password is the employees first and last initial and home zip code.





### **Pledge Now**

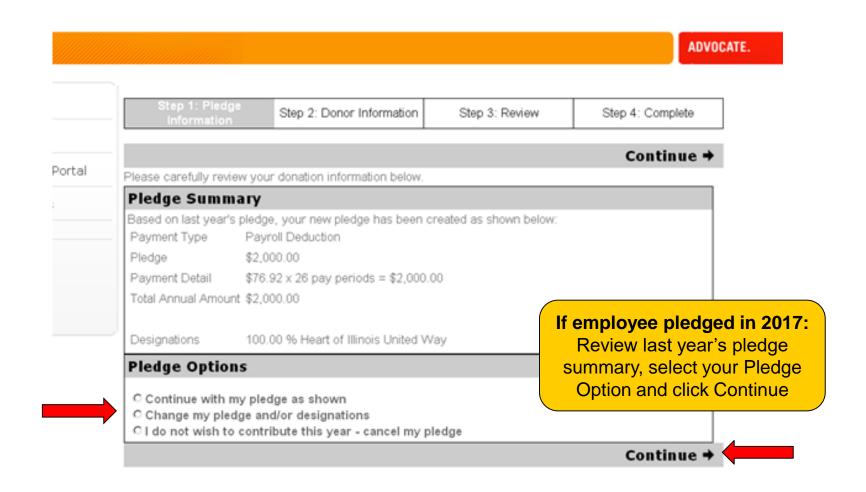
Click on 'Pledge Now' link





### **Employees who pledged in 2017**

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

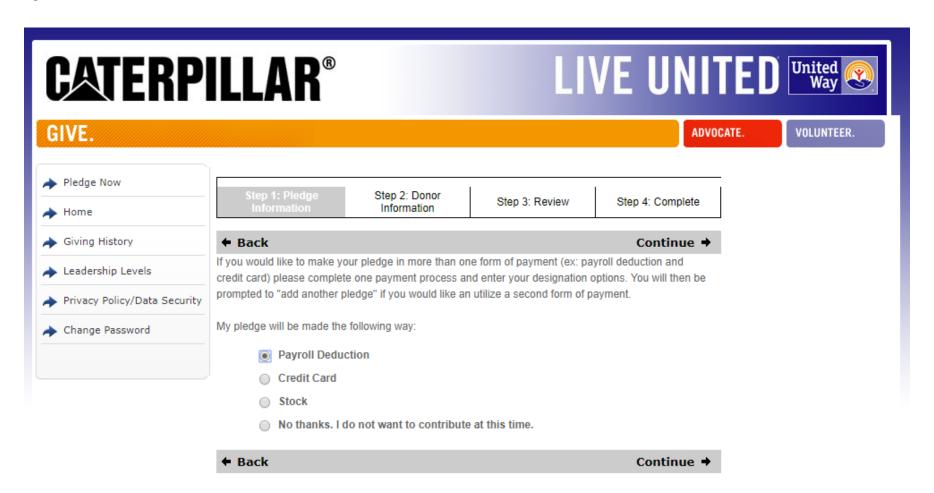




### **Pledging Options**

**Employees have 4 pledging options:** 

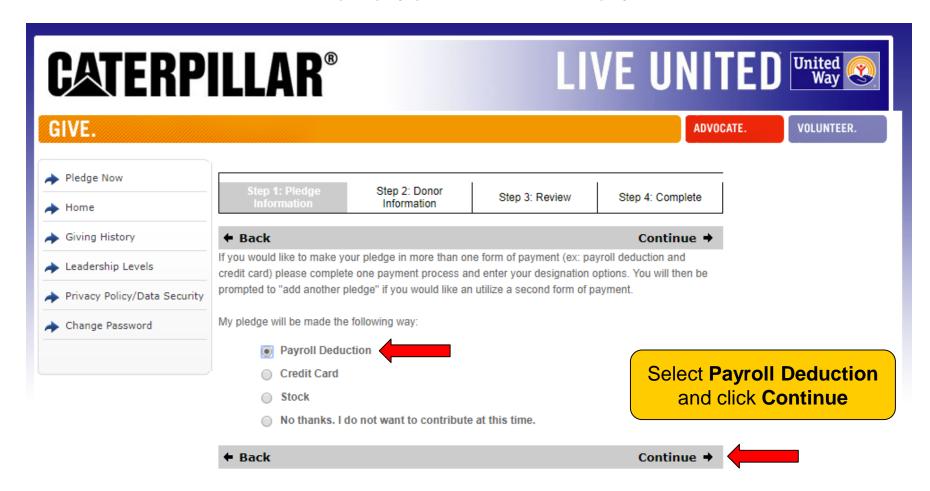
Payroll Deduction, Credit Card, Stock, or No thanks. I do not wish to contribute at this time.





### **Pledging Payroll Deduction**

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





#### **Payroll Deduction**

### **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 Continue →

By making your pledge today you authorize the payroll contribution as marked below to begin effective pay period 1 of the 2019 calendar year. Per pay period contributions are continuous and will roll over each year until you cancel or change the deduction.

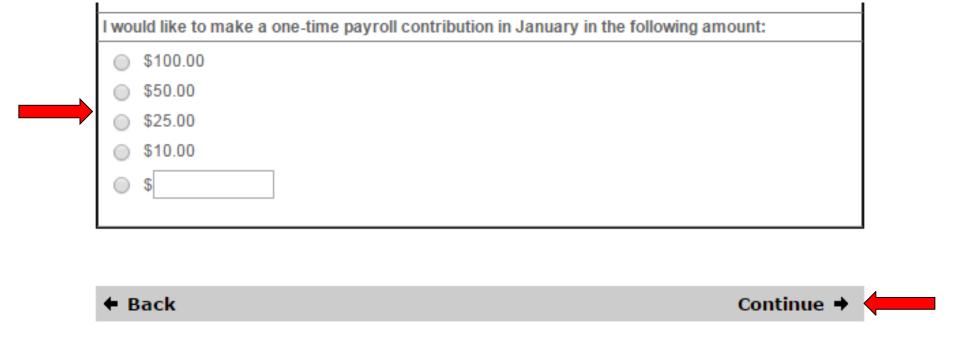
Please indicate your contribution preference.

Payr	ayroll Deduction Payment		
I wou	ıld like to contribute the following amount per pay period:		
	\$10.00 / pay period		
	\$5.00 / pay period		
	\$2.00 / pay period		
	\$1.00 / pay period		
	\$ / pay period		



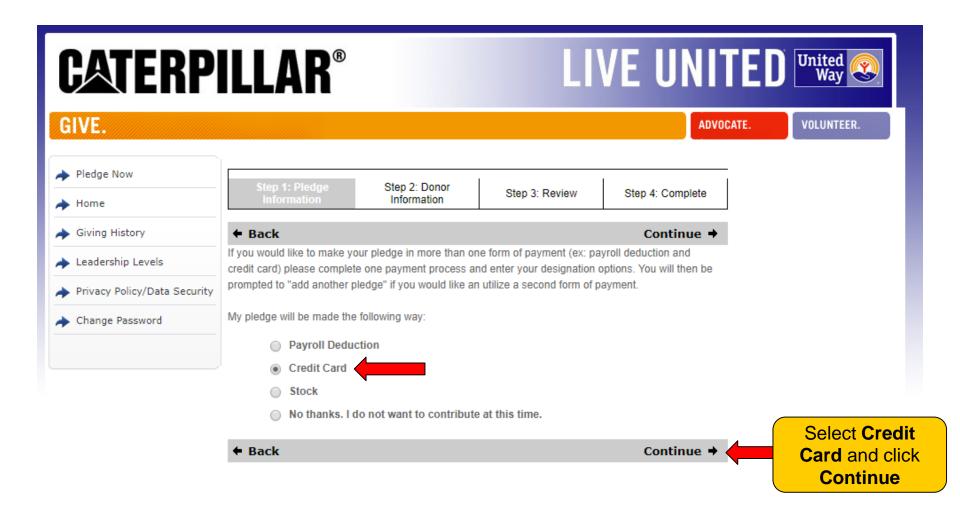
# **Option 2: One-time Payroll Contribution**

Select or enter one-time contribution amount (taken out of 1st paycheck in January 2019) and click Continue





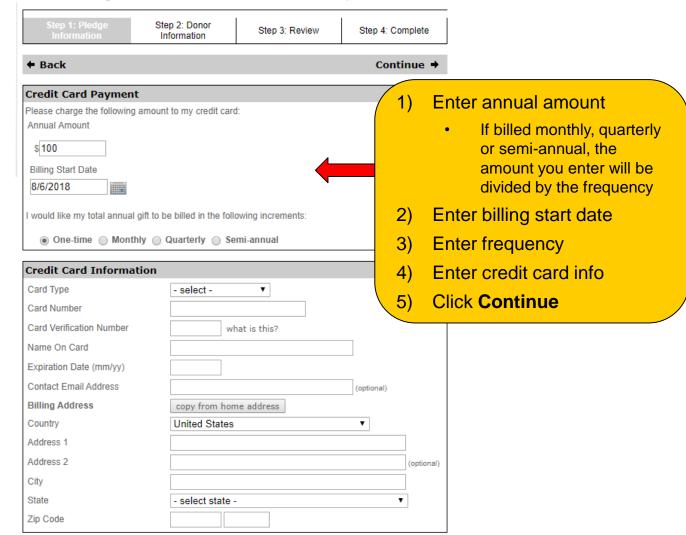
# **Pledging Credit/Debit Card**





#### **Enter Credit/Debit Card Details**

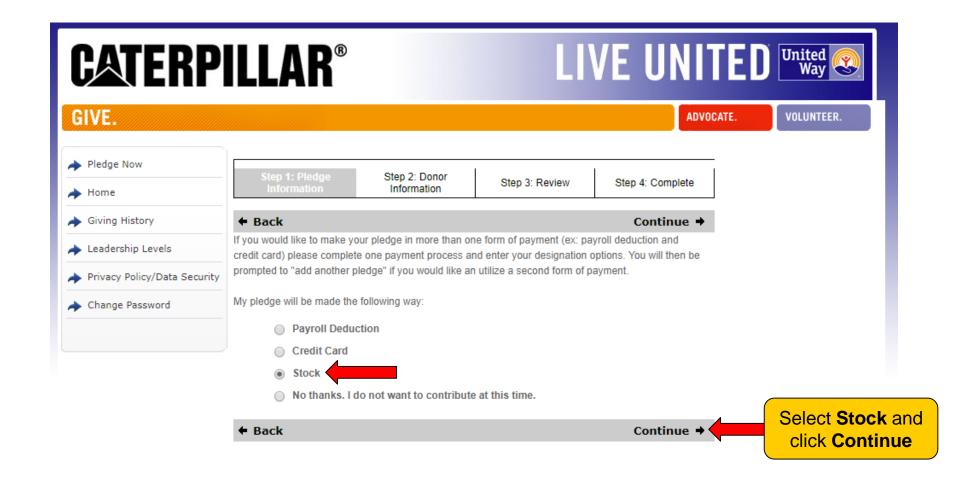
Enter annual amount, billing start date, frequency and credit card information.





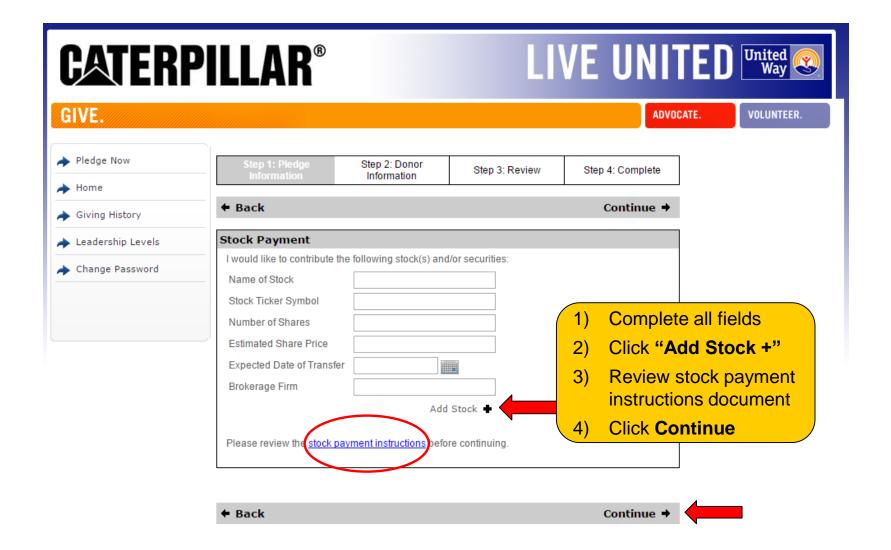


### **Pledging Stock**



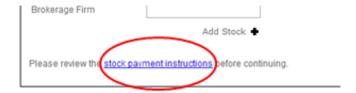


#### **Enter Stock Details**





### **Stock Payment Instructions**





#### 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

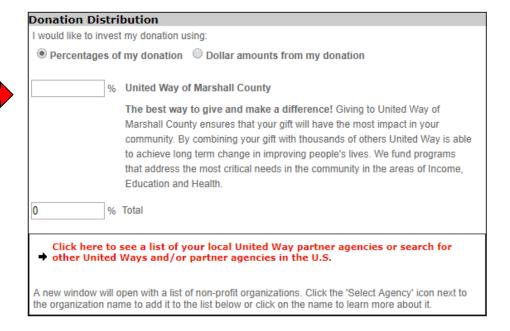
Step 4: Complete

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 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.

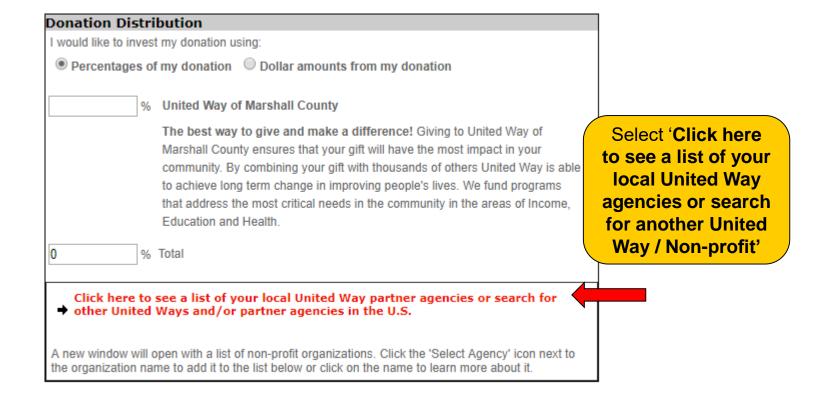
Each United Way is asked to provide and approve all qualified agencies within their organization. Please note that any non-partner agencies will be excluded from the campaign.





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



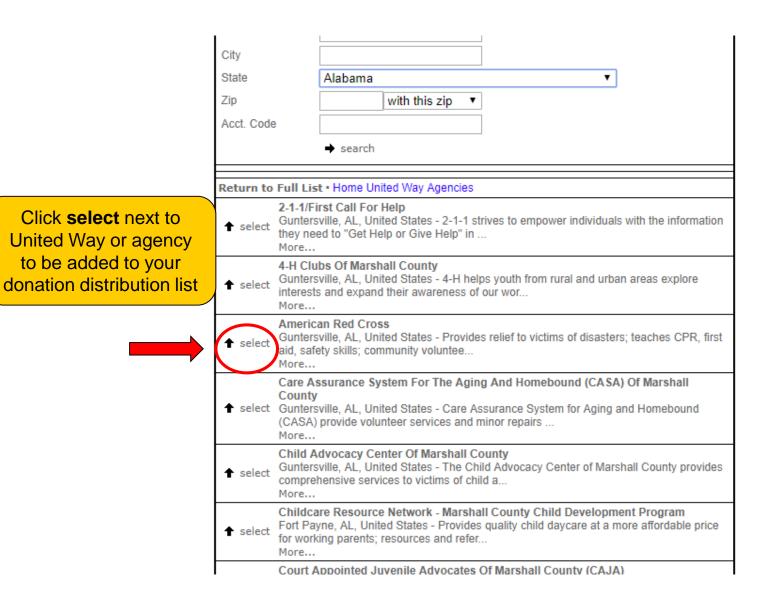


# Search for United Way(s) or Agencies





### **Select United Way or Agency**



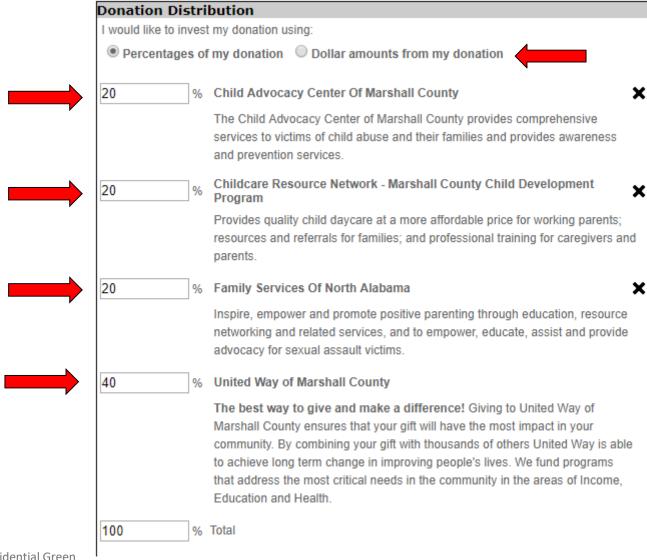


Click **select** next to

to be added to your

### **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.





### **Negative Designation and click Continue**

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

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**

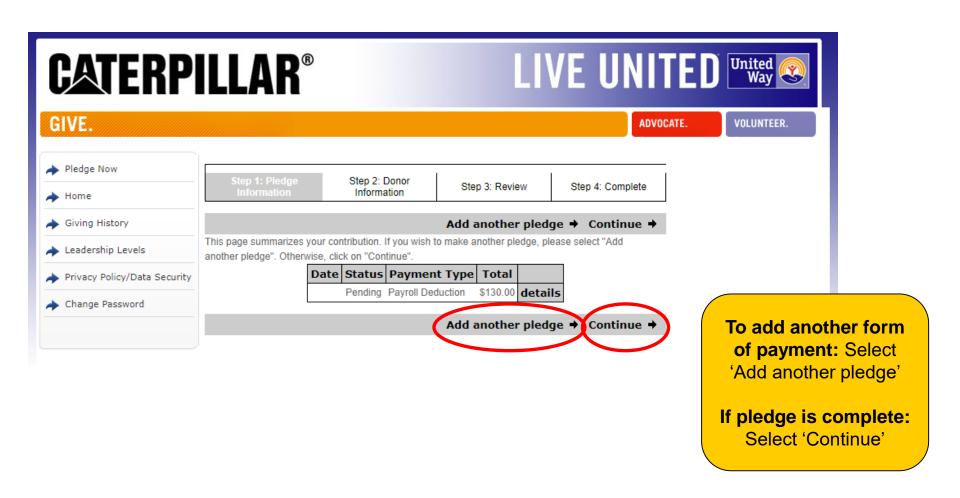
If you have invested your gift in one or more of the above areas and do not want a particular agency to receive a portion of your gift, please indicate the agency below:





### **Option to Add Another Pledge**

Employees can add a second pledge through an alternate form of payment with additional designations or move to the next page if pledge is complete.





### **Donor Recognition**

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

Information	Information	Step 3. Review	Step 4. Complete
<b>←</b> Back			Continue →
	eceive a pledge confirmation	on receipt confirming the d	
	red to provide a home or w		etalis or your
•	elect whether you'd like to	be acknowledged by Cate	rpillar and/or United
Way for your donation or re	emain anonymous.		
Optional: The United Way	may use your home conta	ct information as a tool to	recognize or contact
	nove all your existing con		-
_	in the Home Address an		
	ate show as ' - select stat		•
	ake any necessary change		button to complete the
_	s to your contribution, click	on the 'Back' button.	
Acknowledgement	s		
✓ I would like to be rec	ognized for my contribution	n by Caterpillar and/or Uni	ited Way.
	n anonymous for Caterpilla		
Leadership Recogn	Ition		
Luculd like to include	my anaugala gift for the nu	rnaga of qualifying for a la	adarahin laval
U I would like to include	my spouse's gift for the pu	irpose of qualifying for a fe	adership level.
Account Information	on		
Username	catdemo		
Personal Informati	on		
First Name	John		
Last Name	Doe		



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#### **Enter Donor Information and click 'Continue'**

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

Home Address 2	(opti	ional)
Home City	Albertville (opti	ional)
Home State	Alabama ▼ (opt	tional)
Home Zip Code	35950 (optional)	
Work Contact In	nformation	
Work Email Address	Demo_Donor@cat.com (optional)	
ог		
Phone Number 1	(optional)	
Phone Number 2	(optional)	
Fax Number	(optional)	
	(optional)	
Work Address		
Work Country	United States ▼	
Work Address 1	(opti	ional)
Work Address 2	(opti	ional)
Work City	(opti	ional)
Work State	- select state - ▼ (opt	tional)
Work Zip Code	(optional)	
Preferred Mailin	g Address	
○ Home ● Work		
<b>←</b> Back	C	ontinue 🔸



# Review Pledge Information and click 'Submit Contribution'

Step 1: Pledge Information Step 2: Donor Information

Step 3: Review

Step 4: Complete

#### ♠ 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 August 31, 2018.

#### edit Personal Information

Name Demo Donor Progress Rail

Home Address 123, Albertville, AL 35950 US

Home Phone

Home Email Kempf erika c@cat.com

Work Address Work Phone

Work Email Demo\_Donor@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

40.00 % United Way of Marshall County

20.00 % Child Advocacy Center Of Marshall County

20.00 % Childcare Resource Network - Marshall County Child Development Program

20.00 % Family Services Of North Alabama

**←** CA

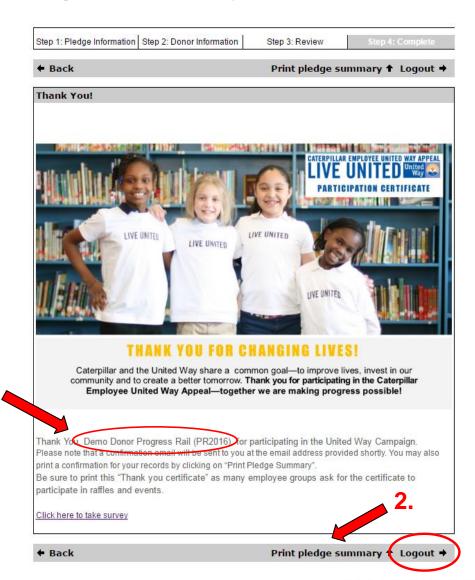


**←** Back

### Thank You Certificate and Pledge Receipt

#### After completing online pledge form, employee 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.





#### **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 & Employee ID)



Dear Demo Donor Progress Rail,

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 2019):

30.00% to American Red Cross, 30.00% to The Marshall County Homeplace, Inc., 40.00% to United Way of Marshall County



<u>Click here</u> to access your certificate of participation. Please be sure to write your name and Employee ID or Badge Number on the certificate before turning it in for raffles and drawings.

Sincerely,

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

Click here to take survey



Employee ID or Badge Number:

