

2018-2019 Online Pledging Process Retirees



GIVE. ADVOCATE. VOLUNTEER.
UnitedWay.org

Caterpillar: Confidential Green

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, the Caterpillar logo is on the left, and 'LIVE UNITED' is in large white letters on a blue background. To the right of 'LIVE UNITED' is the United Way logo. Below the header, there are three buttons: 'GIVE.' (orange), 'ADVOCATE.' (red), and 'VOLUNTEER.' (blue). On the left side, there is a sidebar with links: 'Pledge Now', 'Home', and 'Leadership Levels'. The main content area has 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 buttons for '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?'.

CATERPILLAR® LIVE UNITED United Way

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

→ Pledge Now
→ Home
→ Leadership Levels

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.

Login Information

Username
Password

→ Login → Register

Forgot Password?

First time users: Click Register link

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. 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 red arrow points to the 'Pledge Now' link in the left sidebar menu. The sidebar also includes links for 'Home', 'Giving History', 'Leadership Levels', and 'Change Password'. The main content area features a welcome message 'Welcome Jane Doe' and a large heading 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' 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 text and icons. The left column, under the Caterpillar logo, states: 'Dedicated to transforming lives in the communities where we live and work.' and 'Champion's programs that support education, environment and basic human needs.' The right column, under the 'CATERPILLAR EMPLOYEE UNITED WAY APPEAL LIVE UNITED' logo, states: 'Goes beyond temporary fixes to create lasting change that lifts up entire communities around the world.' and 'Supports organizations making a difference in education, income & health.'

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 **United Way**

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

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

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

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

GIVE.

ADVOCATE.

VOLUNTEER.

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

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review

Step 4: Complete

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 →

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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[← Back](#)[Continue →](#)

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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← 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 \$

← Back

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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← Back

Continue →

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 \$

← Back

Continue →

Stock Option

The screenshot shows the 'Stock Payment' section of the Caterpillar Live United website. The form is titled 'Stock Payment' and includes a list of fields for stock contribution: Name of Stock, Stock Ticker Symbol, Number of Shares, Estimated Share Price, Expected Date of Transfer, and Brokerage Firm. A red circle highlights the 'stock payment instructions' link in the footer text. A red arrow points to the 'Add Stock +' button. A yellow callout box on the right lists four steps: 1) Complete all fields, 2) Click 'Add Stock +', 3) Review stock payment instructions document, and 4) Click Continue. Another red arrow points to the 'Continue' button at the bottom right.

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

← Back Continue →

Stock Payment

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

Name of Stock
Stock Ticker Symbol
Number of Shares
Estimated Share Price
Expected Date of Transfer
Brokerage Firm

Add Stock +

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

1) Complete all fields
2) Click "Add Stock +"
3) Review stock payment instructions document
4) Click Continue

← Back 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

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

Add another pledge → Continue →

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.

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 →

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

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

- select 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	<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"/>
Address	<input type="text"/>
<input type="button" value="search"/>	
Displaying results 1 - 20 of 39	
1 2 <input type="button" value="Next"/>	
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 gender... 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

5	%	Big Brothers Big Sisters	x
Mentoring programs for boys and girls			
35	%	211	x
Access information and referral services 24/7 throughout Peoria, Tazewell, Woodford, Marshall, Stark and Putnam counties			
10	%	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			
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.

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
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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

☒ 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 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
← 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!			
<p>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".</p> <p>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.</p> <p>Mary Brown 509 W. High Street Peoria, IL 61606</p> <p>Click here to take survey</p>			
← 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

Please respond to CEUWA_Cat

07/13/2016 02:02 PM

[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](#)