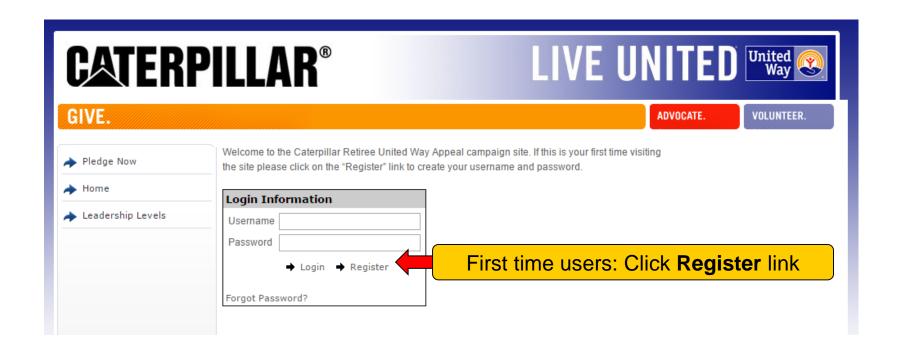


# 2018-2019 Online Pledging Process Retirees



#### **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 <u>username</u> and <u>password</u> that was sent to you in the email communication and click <u>Login</u>.





#### **New User Registration**

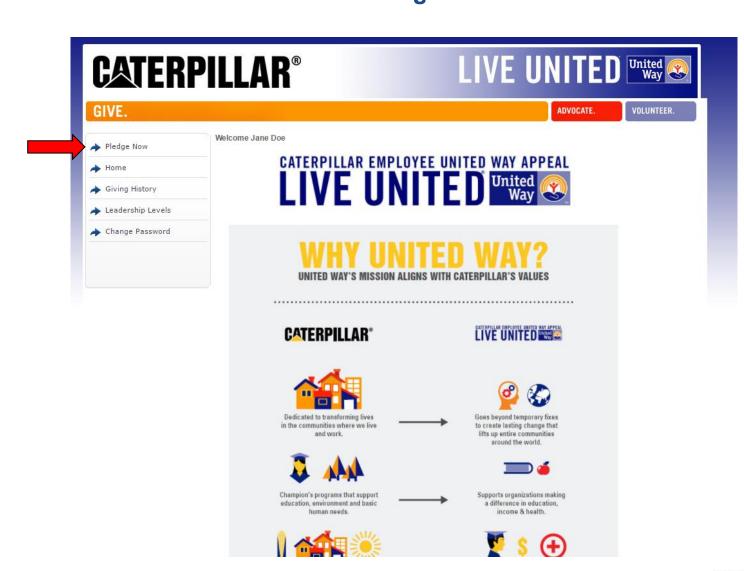
#### Create Username, Password, Personal Information and Contact Information

- 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 Informatio	n
Preferred Username	
Your new password mus character from 2 of the gi contain the following cha Password Examples abcdefg2 - valid, pa\$\$word - valid, 1234567# - valid, abcdefgh - invali	en retype the password to ensure that it has been entered correctly.  It be between 6 and 15 characters in length and contain at least 1 roups of alpha, numeric, or special characters. Your Password may not uracters: ", %, or any white-space.  contains letters and numbers contains letters and special characters contains numbers and special characters d, contains only letters d, less than 6 characters
Password	
Confirm password	
Enter a security question should you forget your pa	to which only you know the answer. You will be asked this question ssword.
Security Question	
Security Answer	
Confirm Security Answer	
Personal Information	on
First Name	
Last Name	
Email Address	
PeopleSoft/Bucyrus/Solar	r ID
Home Address	
Home Country	United States ▼
Home Address 1	
Home Address 2	(optional)
Home City	
Home State	- select state - ▼
Home Zip Code	



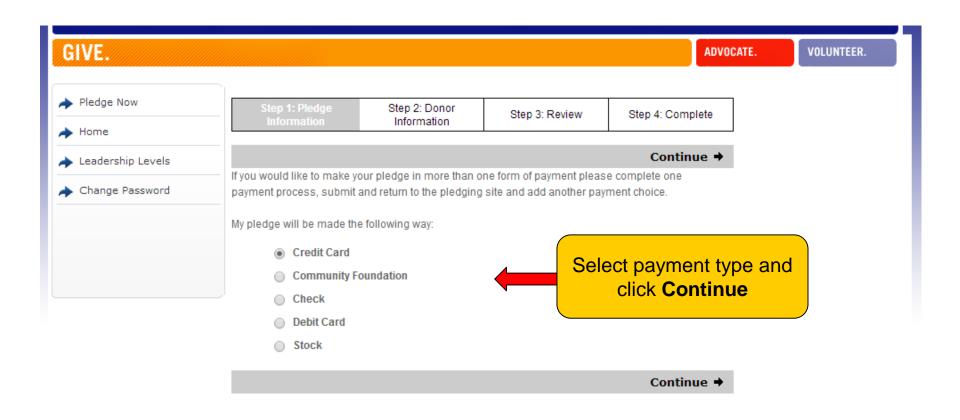
# Pledge Now Click on 'Pledge Now' link





#### **Pledging Options**

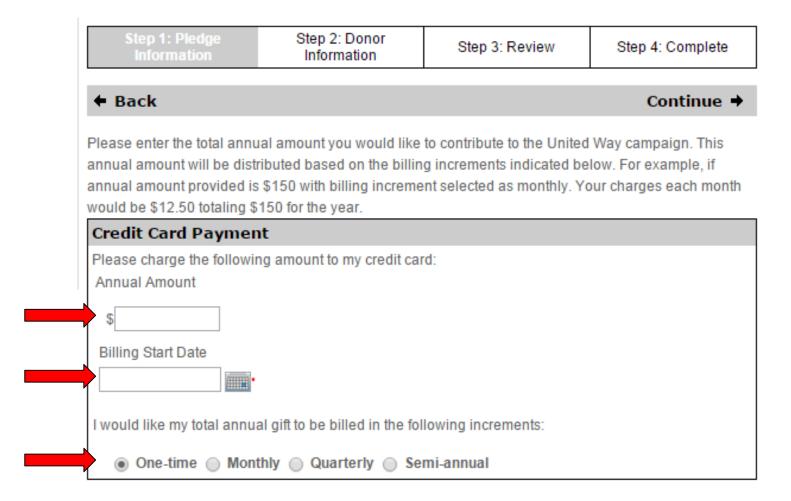
#### Retirees have 5 pledging options: Credit Card, Community Foundation, Check, Debit Card or Stock





#### **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	on
Card Type	- select - ▼
Card Number	
Card Verification Number	what is this?
Name On Card	
Expiration Date (mm/yy)	
Contact Email Address	(optional)
Billing Address	copy from home address
Country	United States ▼
Address 1	
Address 2	(option
City	
State	- select state - ▼
Zip Code	
qoZFI	<b>NA</b>
Enter the text above exactly a	s shown:



Continue →

**←** Back

#### **Community Foundation**

#### **Community Foundation Option**

Enter total annual amount and select Continue.

Please enter	the total annu	ual amount you would like	to contribute to the Unite	d Way campaign. By
	_	ide through a local Comm		•
		rocess as this payment of ation Payment	outon is only for pleages a	ind tracking purposes.
	•	ne following amount:		
Amount \$				



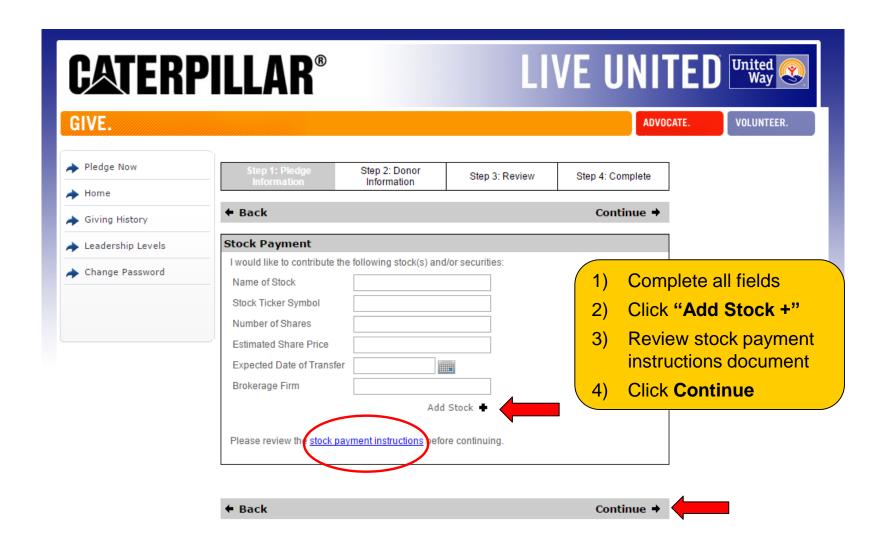
# **Check Option**

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

← Back			Continue →
selecting your gift to be pa process as this payment	ual amount you would like aid in the form of a check p option is only for pledges a	lease ensure you are com	
Check Payment	the following one-time che	ck amount	
Amount \$	are following one-time cire	ck amount.	

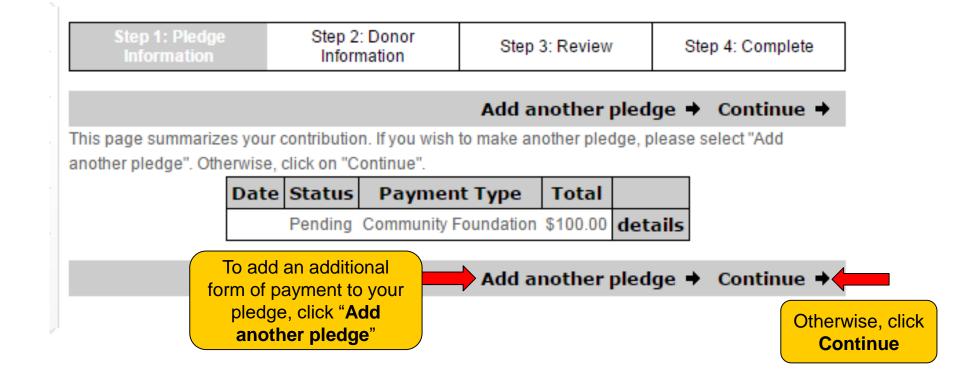


#### **Stock Option**





# **Multiple Forms of Payment for Pledge**





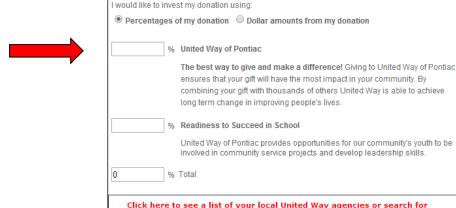
#### **Designation Options**

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.



→ another United Way/Non-profit.

**Donation Distribution** 

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:	
	_

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.



**←** 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
% 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
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.

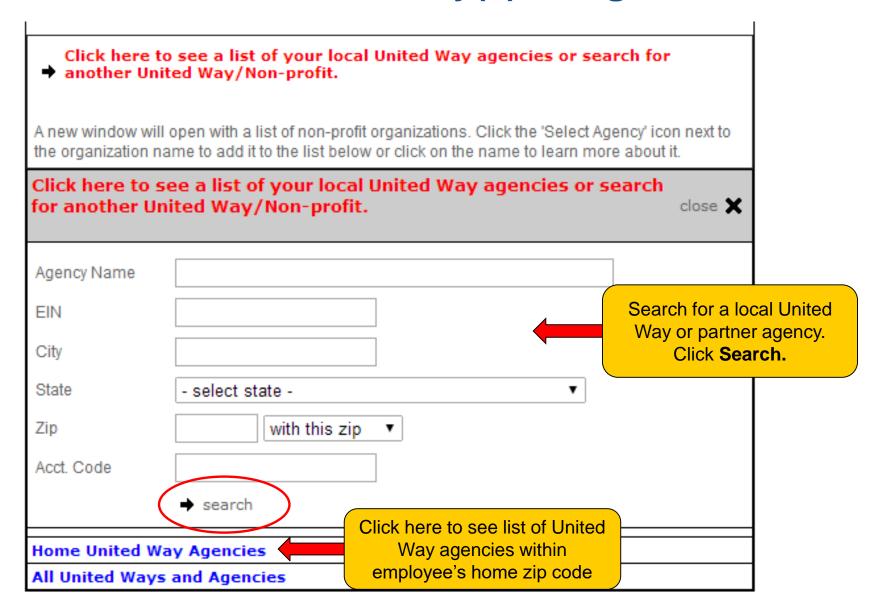
Select 'Click here to see a list of your local United Way agencies or search for another United Way / Non-profit'

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:

**←** Back Continue **→** 

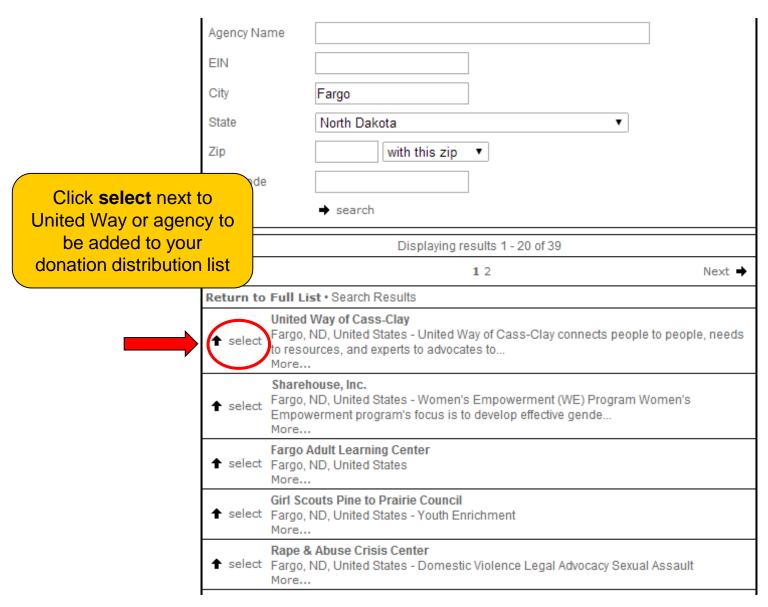


#### Search for United Way(s) or Agencies





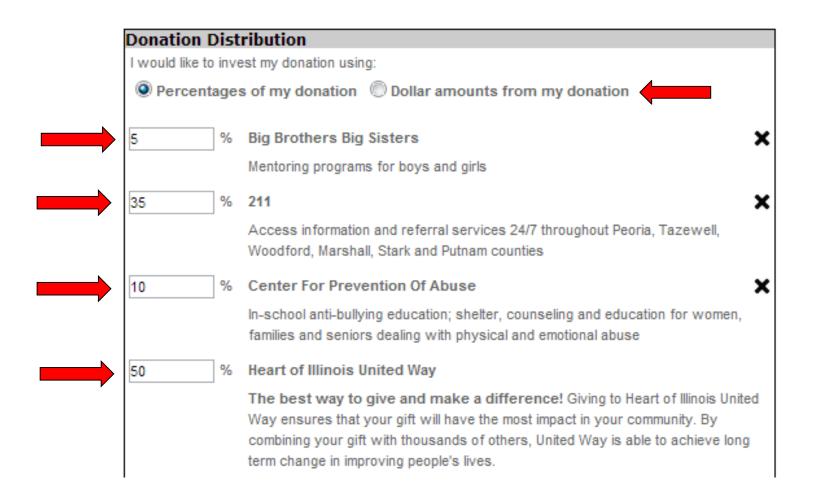
#### **Select United Way or Agency**





#### **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.

	e to see a list of your local United Way agencies or search for United Way/Non-profit.
	will open with a list of non-profit organizations. Click the 'Select Agency' icon next to on name to add it to the list below or click on the name to learn more about it.
Negative D	esignations
	sted your gift in one or more of the above areas and do not want a particular agency



Continue '

← Back

#### **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	ı is optional.		
The United Way may use	home contact information :	as a tool to recognize and	contact donors.
below and click the 'Continction of the 'Back' button.	review your information be nue' button to complete the	_	
Acknowledgement	•		
I would like to be red	ognized for my contribution	n by Caterpillar and/or Uni	ted Way.
	n anonymous for Caterpilla		
			5
	141		
Leadership Recogn	ition		
L would like to include	my spouse's gift for the po	urnose of qualifying for a lo	eadership level



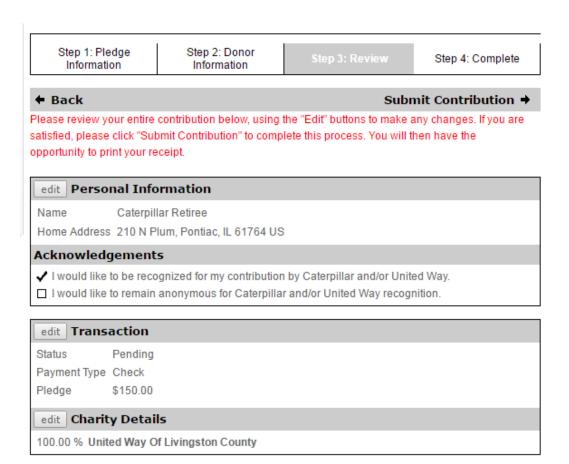
#### **Enter Donor Information and click 'Continue'**

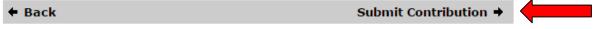
Information on this page is optional. Retiree can enter or change information in these fields.

☐ I would like to include	e my sp	pouse's gift for the purpose of qua	lifying for a	leadership level.
Account Information	on			
Username	re	tiree		
Personal Informati	on			
First Name		Caterpillar		
Last Name		Retiree		
Email Address		kempf_erika_c@cat.com		
PeopleSoft/Bucyrus/Sola	ar ID	0584324		
Home Address				
Home Country	Unite	ed States	•	
Home Address 1	210 [	N Plum		
Home Address 2				(optional)
Home City	Pont	iac		
Home State	Illino	is		▼
Home Zip Code	6176	4		
← Back				Continue →



#### Review Pledge Information and click 'Submit Contribution'







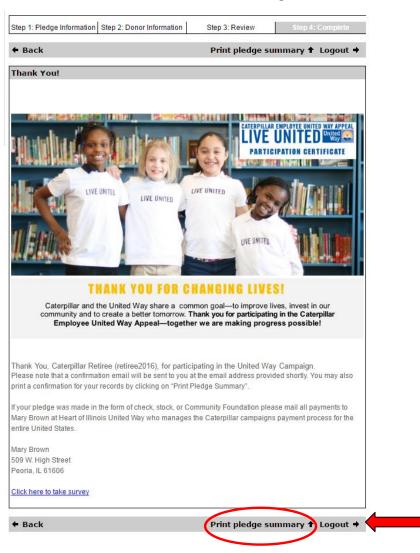
#### **Print Pledge Receipt and Logout**

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





#### **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

