

2018 Online Pledging Process U.S. & ISE Caterpillar Payroll Employees



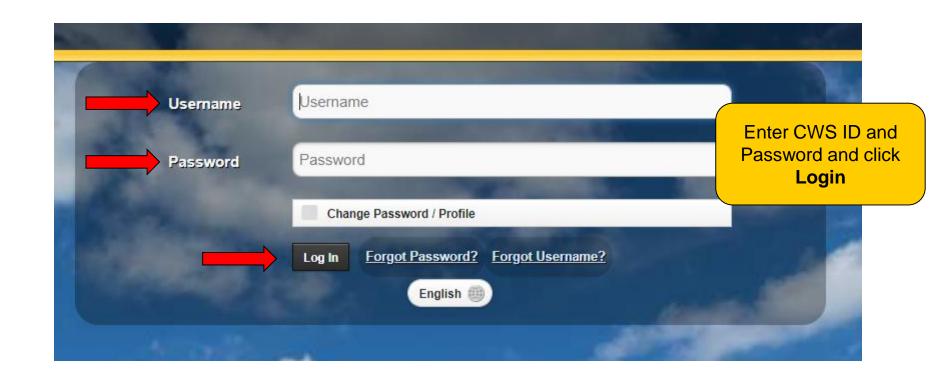
United Way Campaign Underway Employee Notifications

- Active full and part-time U.S. and ISE's with active CAT email addresses will receive
 an email the morning of August 6, 2018 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 8/30
- 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.
- <u>Production Employees</u> 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.





Accessing eWay - Production Employee Login

Employees will log in with <u>7-digit</u> 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.

Example:

Username – 0123457 **Password** – AP61614

Login Information

Username Password

→ Login

Employee will have

opportunity to reset

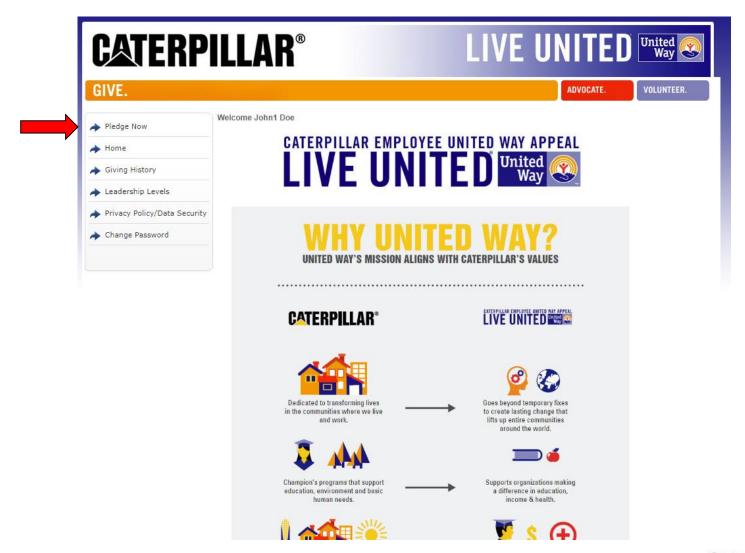
password immediately

after logging in

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Pledge Now

Click on 'Pledge Now' link

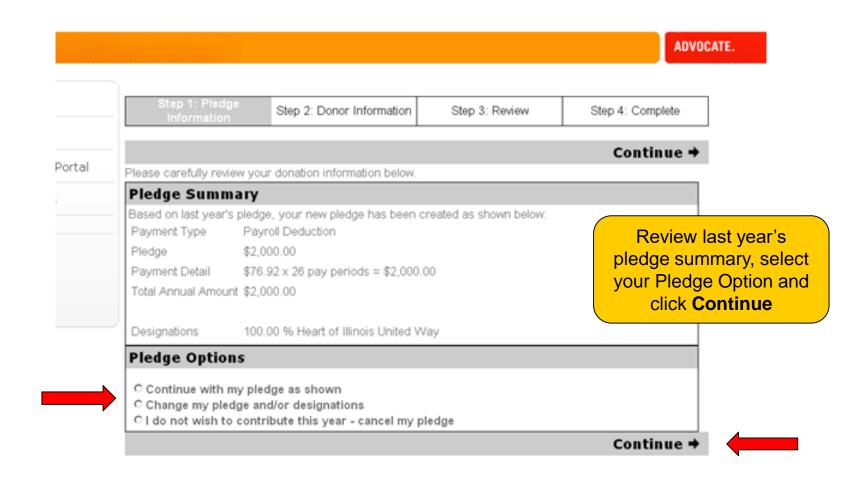




Employees who pledged in 2017

If employee pledged in 2017, previous pledge summary will appear:

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

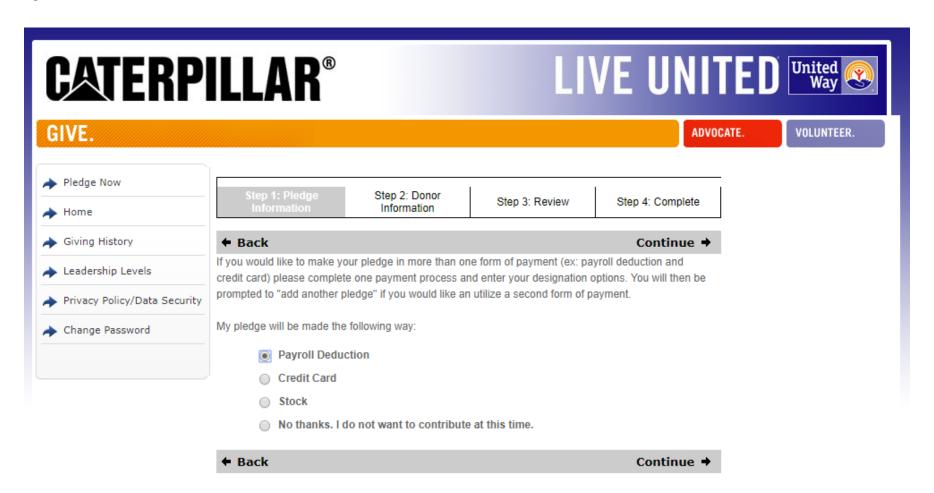




Pledging Options

Employees have 4 pledging options:

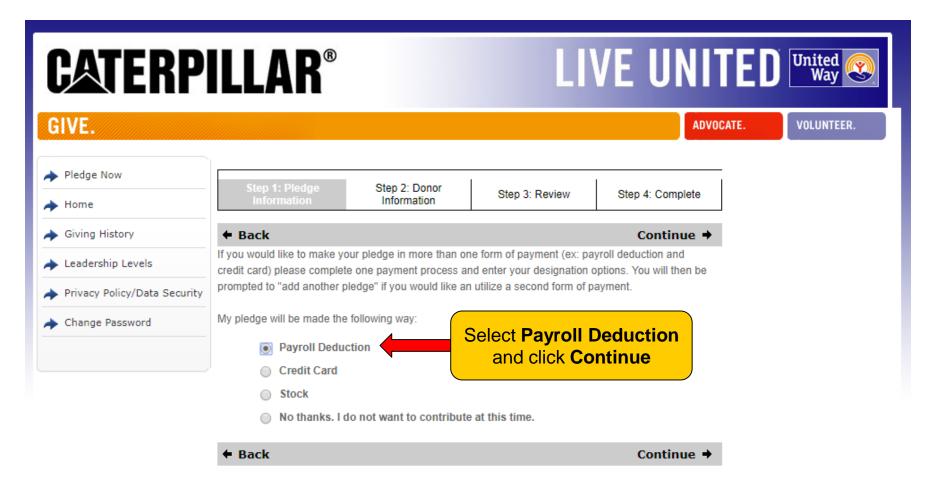
Payroll Deduction, Credit Card, Stock, or No thanks. I do not wish to contribute at this time.





Pledging Payroll Deduction

Employee has 3 options for payroll deduction: Amount per pay period, One-time payment, or Percentage of annual salary





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 Step 2: Donor Step 3: Review Step 4: Complete Information ← Back 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. Payroll Deduction Payment I would like to contribute the following amount per pay period: \$20.00 / pay period \$15.00 / pay period \$10.00 / pay period \$5.00 / pay period \$ 12 / 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

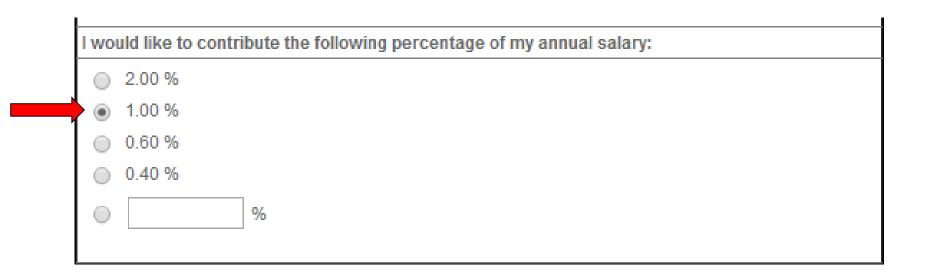
	ald like to make a one-time payroll contribution in January in the following amount:
	\$100.00
	\$75.00
•	\$50.00
	\$25.00
	s
I wou	ıld like to contribute the following percentage per pay period:
	2.00 %
	1.00 %
	0.60 %
	0.40 %
	%





Option 3: Percentage of Annual Salary

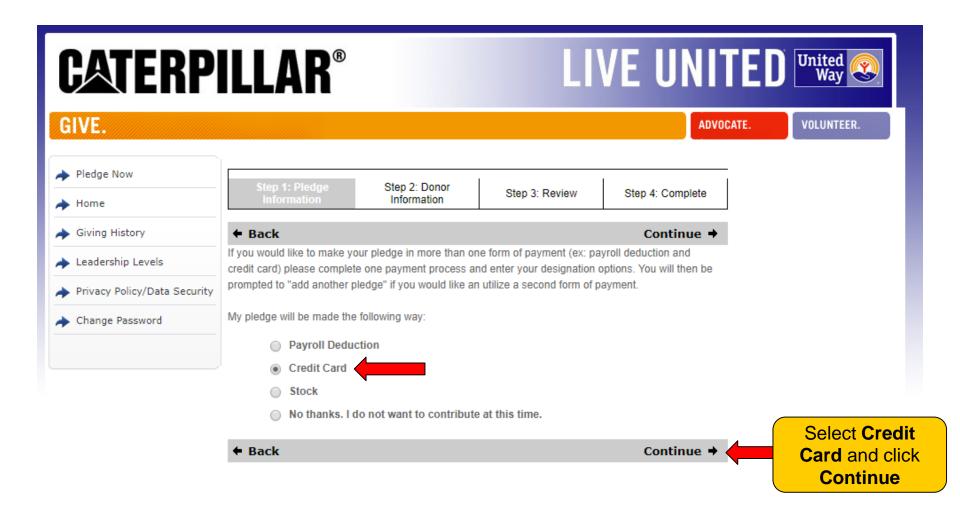
Select or enter percentage of annual salary to contribute and click Continue



← Back Continue **→**



Pledging Credit/Debit Card





Enter Credit/Debit Card Details

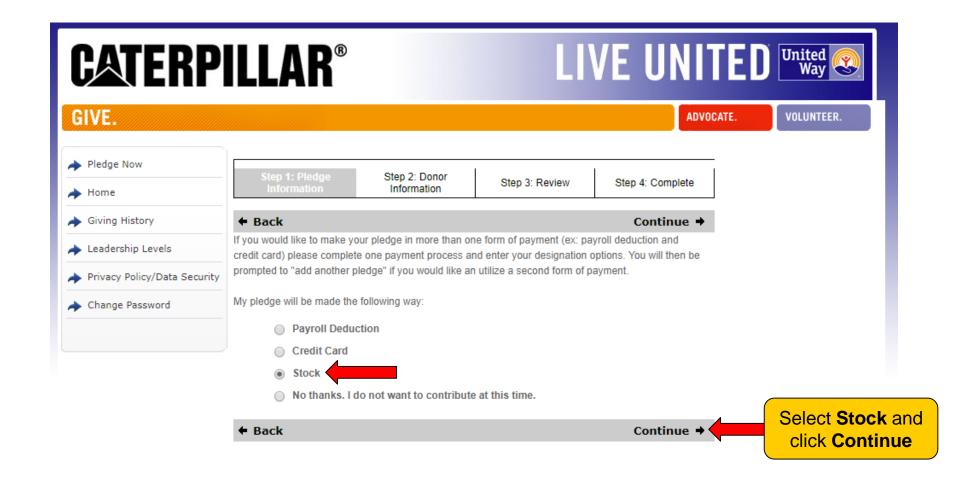
Enter annual amount, billing start date, frequency and credit card information.

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Co	mplete	
← Back			Cont	inue →	
Credit Card Payment				I)	Enter annual amount
Please charge the following am Annual Amount \$ 100 Billing Start Date 8/6/2018	ount to my credit car	d:		i <i>)</i>	If billed monthly, quarterly or semi-annual, the amount you enter will be divided by the frequency
I would like my total annual gift	to be billed in the foll	owing increments:	2	2) E	Enter billing start date
One-time	Quarterly Se	emi-annual	3	1	Enter frequency
Credit Card Informatio	n			1) E	Enter credit card info
Card Type	- select -	▼		-, -	
Card Number				5) C	Click Continue
Card Verification Number	w	hat is this?			
Name On Card					
Expiration Date (mm/yy)					
Contact Email Address			(optional)		
Billing Address	copy from hor	ne address			
Country	United States		•		
Address 1					
Address 2				(optional)	
City					
State	- select state	-	,	- '	
Zip Code					



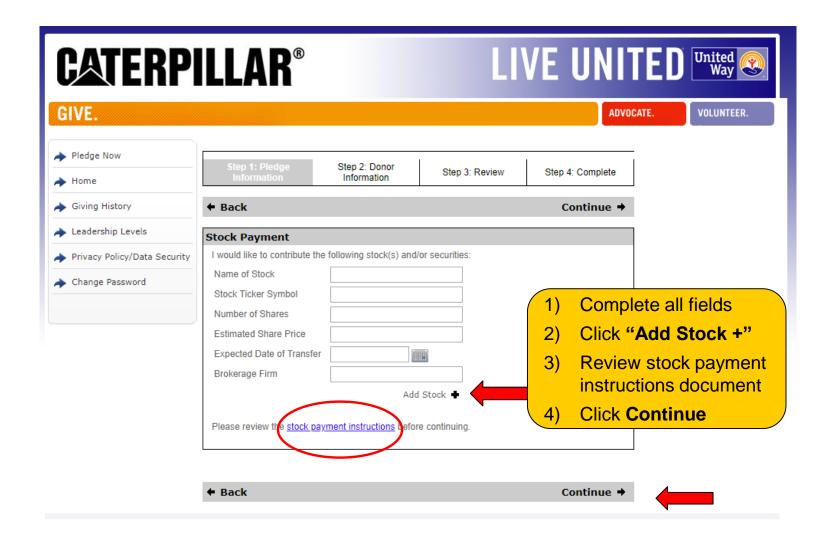


Pledging Stock



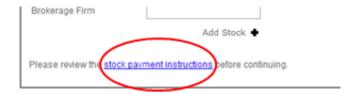


Enter Stock Details





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:

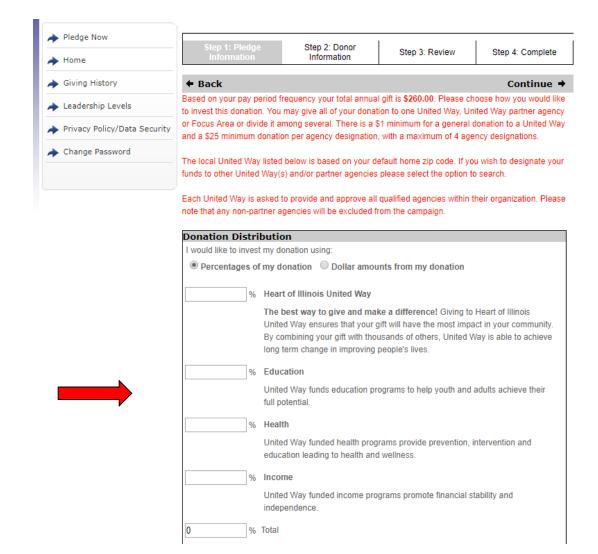
- Complete the online pledge process by completing the required stock details, selecting your designation details and submitting your pledge.
- Contact your financial advisor and complete the payment process as specified in your pledge.

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.



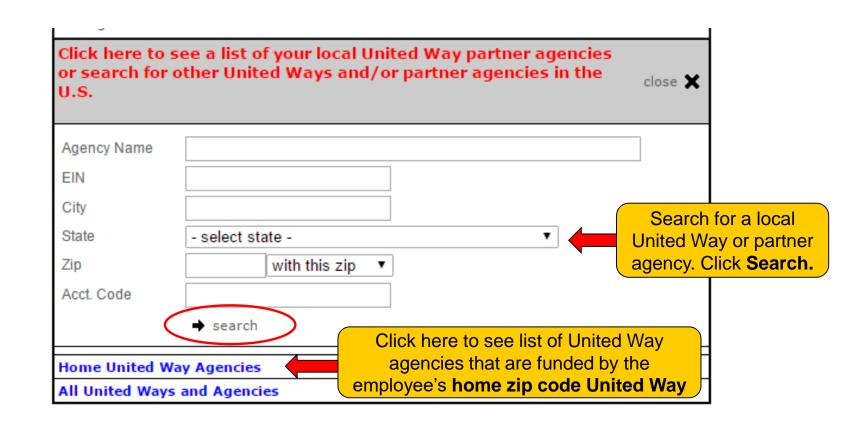


How to Designate to other United Way(s) or United Way Funded Agencies

Donation Distri	bution		
I would like to inves	st my donation using:		
Percentages of	of my donation ODollar amounts from my donation		
%	Heart of Illinois United Way		
	The best way to give and make a difference! Giving to Heart of Illino Way ensures that your gift will have the most impact in your communit combining your gift with thousands of others, United Way is able to aclong term change in improving people's lives.	ty. By	
%	Education		
	United Way funds education programs to help youth and adults achie full potential.	ve their	
%	Health		
	United Way funded health programs provide prevention, intervention education leading to health and wellness.	see a	ct 'Click here to list of your local
%	Income		ed Way partner cies or search for
	United Way funded income programs promote financial stability and independence.	oth	er United Ways
0 %	Total		icies in the U.S.'
	see a list of your local United Way partner agencies or search Ways and/or partner agencies in the U.S.	for	
	open with a list of non-profit organizations. Click the 'Select Agency' icc ame to add it to the list below or click on the name to learn more about i		0.47500111

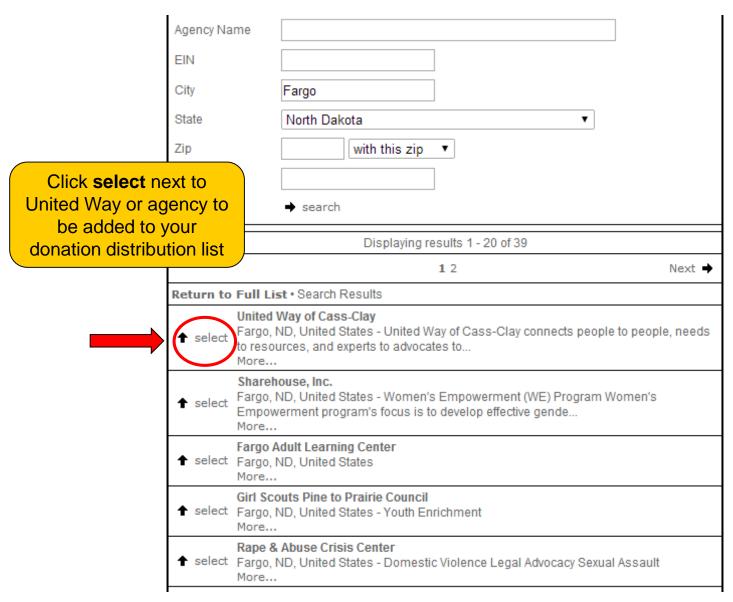
CATERPILLAR®

Search for United Way(s) or Agencies





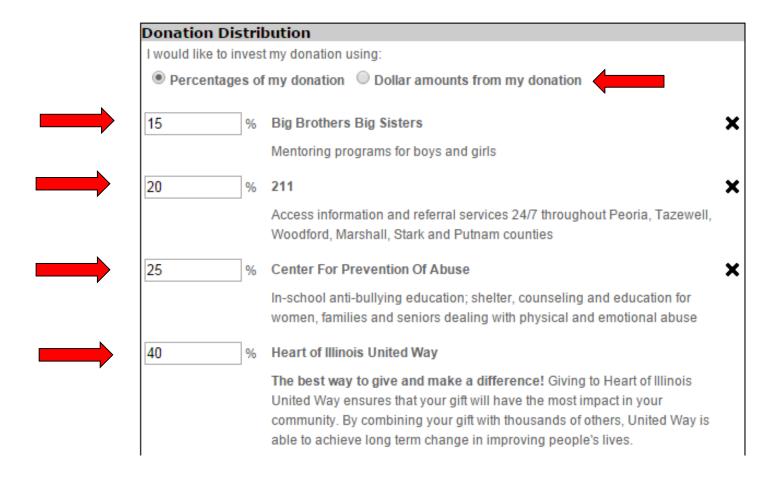
Select United Way or Agency





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:



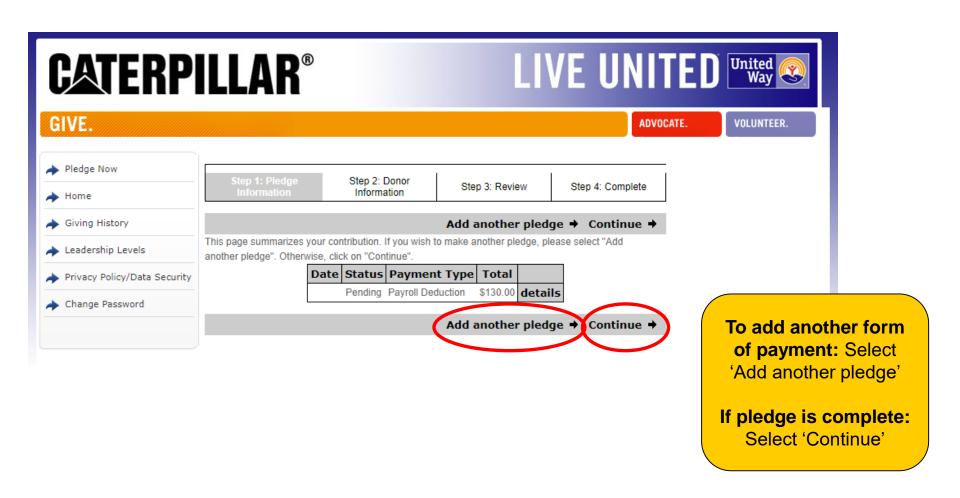
Continue •





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
← Back			Continue →
	eceive a pledge confirmation	on receipt confirming the d	
	red to provide a home or w		etalis of 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	ect 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	5		
✓ I would like to be rec	cognized for my contribution	n by Caterpillar and/or Uni	ited Way.
	n anonymous for Caterpilla		
Leadership Recogn	ition		
Lwould like to include	my spouse's gift for the pu	rnoco of qualifying for a lo	adorchin lovol
□ I Would like to ilicidde	my spouses gill for the pu	irpose of qualifying for a re	adership level.
Account Information	on		
Username	catdemo		
Personal Informati	on		
First Name	John		
Last Name	Doe		



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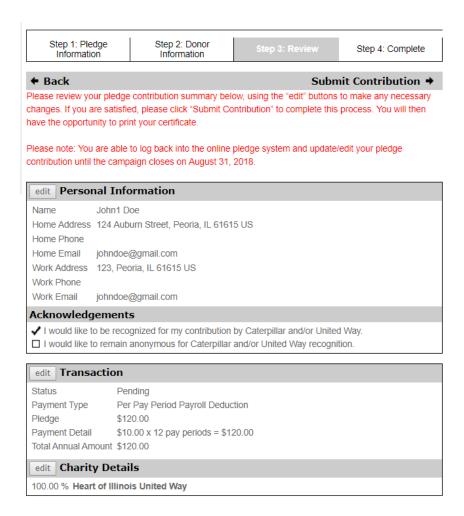
Enter Donor Information and click 'Continue'

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

Home City	Pontiac		(optional)
Home State	Illinois		▼ (optional)
Home Zip Code	61550	(optional)	
Work Contact Inf	ormation		
Work Email Address	Doe_John_C@cat.com	(optional)	
ог			
Phone Number 1		(optional)	
		_	
Phone Number 2		(optional)	
Fax Number		(optional)	
Work Address			
Work Country	United States	•	
Work Address 1	210 N Plum		(optional)
Work Address 2			(optional)
Work City	Peoria		(optional)
Work State	Illinois		▼ (optional)
Work Zip Code	61614	(optional)	
Preferred Mailing	Address		
Home Work			



Review Pledge Information and click 'Submit Contribution'



Submit Contribution →



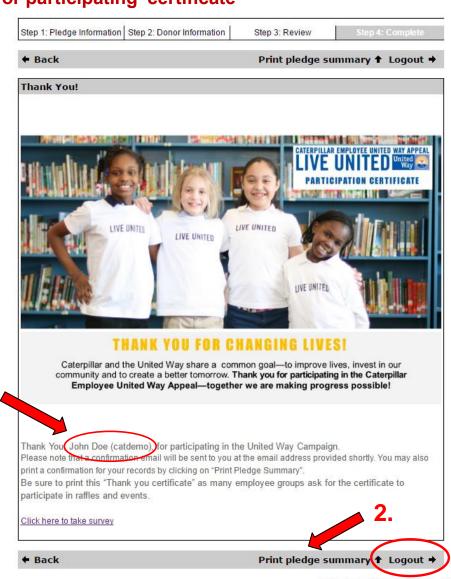
◆ Back

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.



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)



Dear John1 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 2019):

100.00% to Heart of Illinois United Way



<u>Click here</u> 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!



PeopleSoft ID #:

mployee Name (print)		

