

2019 Online Pledging Process

Solar Payroll Employees



GIVE. ADVOCATE. VOLUNTEER.
UnitedWay.org

Caterpillar: Confidential Green

United Way Campaign Underway

Employee Notifications

- Active full and part-time Solar U.S. and ISE's with active CAT email addresses will receive an email the morning of **August 5, 2019** 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 8/29
- 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.
- Solar 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.



The screenshot shows the eWay CWS Login interface. It features a blue background with a yellow header bar. The login form is centered and includes the following elements:

- Username field:** A white input box with the placeholder text "Username". A red arrow points to it from the label "Username".
- Password field:** A white input box with the placeholder text "Password". A red arrow points to it from the label "Password".
- Change Password / Profile link:** A link with a small square icon and the text "Change Password / Profile".
- Log In button:** A dark grey button with the text "Log In". A red arrow points to it.
- Forgot Password? link:** A link with the text "Forgot Password?".
- Forgot Username? link:** A link with the text "Forgot Username?".
- Language selector:** A white button with the text "English" and a globe icon.

A yellow callout box on the right side of the form contains the text: "Enter CWS ID and Password and click **Login**".

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

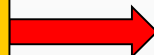
Username
Password

→ Login

Employee will have opportunity to reset password immediately after logging in

Example:

Username – 0123457
Password – AP61614



Pledge Now

Click on 'Pledge Now' link

CATERPILLAR®

Welcome Demo Donor Solar | [Logout](#) English ▼



Pledge Now

Giving History

Privacy Policy

Leadership Levels

Contact Us

[Contact](#) [Terms & Conditions](#)

Employees who pledged in 2018

If employee pledged in 2018, previous pledge summary will appear:

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

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
----------------------------	---------------------------	----------------	------------------

Continue →

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

Continue →

Review last year's pledge summary, select your Pledge Option and click **Continue**



Pledging Options

Employees have 4 pledging options:

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



Jane Doe Is Logged In | [Logout](#) English ▼

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review

Step 4: Complete

[Back](#)

[Continue](#)

If you would like to make your pledge in more than one form of payment (ex: payroll deduction and credit card) please complete one payment process and enter your designation options. You will then be prompted to "add another pledge" if you would like an utilize a second form of payment.

My pledge will be made the following way:

- ☒ **Payroll Deduction**
- ☐ **Credit Card**
- ☐ **Stock**
- ☐ **No thanks. I do not want to contribute at this time.**

[Back](#)

[Continue](#)

Pledging Payroll Deduction

Employee has 3 options for payroll deduction:
Amount per pay period or One-time payment



Jane Doe Is Logged In | [Logout](#) English

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review

Step 4: Complete

Back

Continue

If you would like to make your pledge in more than one form of payment (ex: payroll deduction and credit card) please complete one payment process and enter your designation options. You will then be prompted to "add another pledge" if you would like an utilize a second form of payment.

My pledge will be made the following way:

- ☒ Payroll Deduction
- ☐ Credit Card
- ☐ Stock
- ☐ No thanks. I do not want to contribute at this time.

Select Payroll Deduction
and click Continue

Back

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

Back

Continue

By making your pledge today you authorize the payroll contribution as marked below to begin **effective pay period 01 of the 2020 calendar year**. Per pay period contributions are continuous and will roll over each year until you cancel or change the deduction.

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 2020) 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

☐ \$

Back

Continue

Pledging Credit/Debit Card



Jane Doe is Logged In | [Logout](#) English ▼

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review


Step 4: Complete

[Back](#)

[Continue](#)

If you would like to make your pledge in more than one form of payment (ex: payroll deduction and credit card) please complete one payment process and enter your designation options. You will then be prompted to "add another pledge" if you would like to utilize a second form of payment.

My pledge will be made the following way:

- ☐ Payroll Deduction
- ☒ Credit Card 
- ☐ Stock
- ☐ No thanks. I do not want to contribute at this time.

[Back](#)

Select **Credit Card** and click **Continue**

[Continue](#)

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: Complete

Back

Continue

Credit Card Payment

Please note that credit card contributions can NOT be edited after you hit the 'Submit Contribution' button on final page of the pledging site.

Please charge the following amount to my credit card:

Annual Amount
\$100

Billing Start Date
8/5/2019

I would like my total annual gift to be billed in the following increments:

☒ One-time ☐ Monthly ☐ Quarterly ☐ Semi-annual

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

- 1) Enter annual amount
 - If billed monthly, quarterly or semi-annual, the amount you enter will be divided by the frequency
- 2) Enter billing start date
- 3) Enter frequency
- 4) Enter credit card info
- 5) Click **Continue**

Back

Continue

Pledging Stock



Jane Doe Is Logged In | [Logout](#) English ▼

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review


Step 4: Complete

[Back](#)

[Continue](#)

If you would like to make your pledge in more than one form of payment (ex: payroll deduction and credit card) please complete one payment process and enter your designation options. You will then be prompted to "add another pledge" if you would like to utilize a second form of payment.

My pledge will be made the following way:

- ☐ Payroll Deduction
- ☐ Credit Card
- ☒ **Stock** 
- ☐ No thanks. I do not want to contribute at this time.

[Back](#)

Select **Stock** and click **Continue**

[Continue](#)

Enter Stock Details

Jane Doe Is Logged In | [Logout](#) English ▼[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)**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 (please click 'Add Stock' after entering your stock information):

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](#)

Stock Payment Instructions

Donating Stock to the United Way

Caterpillar employees generously give their time and resources to charitable organizations such as the United Way. Each gift—big or small—makes a difference in the communities where we live and work. When considering your gift, remember there is more than one way to provide financial support to the United Way. You can give a cash contribution through monthly payroll deduction or a single lump-sum cash payment. You can also donate property such as stock.

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.
- Contact Mary Brown at the Heart of Illinois United Way, 309-674-5181 or mary.brown@unitedway.org to inform her when the transfer of stock will be taking place.

Below are the United Way Account and DTC Numbers for Heart of Illinois United Way:

Heart of Illinois United Way (HOIUW Depository)

Account: 14833392

DTC: 0547

At: Robert W. Baird

If you have further questions regarding the stock process please contact Mary Brown at 309-674-5181 or mary.brown@unitedway.org.

Expected Date of Transfer

Brokerage Firm

[Add Stock](#)

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



[Back](#)

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.



John1 Doe Is Logged In | [Logout](#) English

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review

Step 4: Complete

[Back](#)

[Continue](#)

Based on your pay period frequency your total annual gift is **\$120.00**. 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 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 scroll to the bottom of the page and use the search tool.
- To view the list of partner agencies that align to your local United Way, after clicking on the search tool, click 'Home United Way Agencies'.

Donation Distribution

I would like to invest my donation using:

☒ Percentages of my donation ☐ Dollar amounts from my donation

<input type="text"/>	%	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.
<input type="text"/>	%	Education United Way funds education programs to help youth and adults achieve their full potential.
<input type="text"/>	%	Health United Way funded health programs provide prevention, intervention and education leading to health and wellness.
<input type="text"/>	%	Income United Way funded income programs promote financial stability and independence.
0 <input type="text"/>	%	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

% **Health**

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

% **Income**

United Way funded income programs promote financial stability and independence

% Total

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.'

[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.

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.](#)

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 partner agencies or search for other United Ways and/or partner agencies in the U.S.](#) [close](#)

Agency Name	<input type="text"/>
EIN	<input type="text"/>
City	<input type="text"/>
State	<input type="text" value="- select state -"/>
Zip	<input type="text"/> with this zip <input type="button" value="▼"/>
Acct. Code	<input type="text"/>

search

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

[Home United Way Agencies](#)
[All United Ways and Agencies](#)
[Other](#)

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

Click **select** next to United Way or agency to be added to your donation distribution list

Agency Name	<input type="text"/>
EIN	<input type="text"/>
City	Lafayette
	Indiana
	<input type="text"/> with this zip
	<input type="text"/>
<input type="button" value="search"/>	

Displaying results 1 - 20 of 23

[1 2](#) [Next](#)

[Return to Full List](#) • Search Results

<input type="button" value="select"/>	United Way of Greater Lafayette & Tippecanoe County Lafayette, IN, United States - United Way of Greater Lafayette is leading the community to empower every person to discover and p... More...
<input type="button" value="select"/>	Hanna Community Council Inc Lafayette, IN, United States More...
<input type="button" value="select"/>	Food Finders Food Bank, Inc. Lafayette, IN, United States - Since 1981, Food Finders Food Bank has worked to provide full service programs that meet the nutri... More...
<input type="button" value="select"/>	American Red Cross Lafayette, IN, United States More...
<input type="button" value="select"/>	Senior Center of Tippecanoe Lafayette, IN, United States More...
<input type="button" value="select"/>	Lafayette Transitional Housing Lafayette, IN, United States More...
<input type="button" value="select"/>	Family Services Inc. Lafayette, IN, United States

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

Mentoring programs for boys and girls

20 %

Center For Prevention Of Abuse

In-school anti-bullying education; shelter, counseling and education for women, families and seniors dealing with physical and emotional abuse

25 %

Children's Hospital of Illinois at OSF Saint Francis Medical Center

Medical and behavioral health services

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 

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.



John1 Doe Is Logged In | [Logout](#) English ▼

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

**Step 1: Pledge
Information**

Step 2: Donor Information

Step 3: Review

Step 4:

[Add another pledge](#)

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 Payroll Deduction	\$120.00	details

[Add another pledge](#)

[Continue](#)

**To add another form
of payment:** Select
'Add another pledge'

If pledge is complete:
Select 'Continue'

Donor Recognition

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



John1 Doe Is Logged In | [Logout](#) English ▼

[Home](#) | [Leadership Levels](#) | [Privacy Policy](#) | [Giving History](#) | [Contact](#)

Step 1: Pledge Information

Step 2: Donor Information

Step 3: Review

Step 4: Complete

[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 contact information as a tool to recognize donors if you select to be acknowledged. **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 'Continue' to complete the process.

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. Employee can enter or change information in these fields.

Home Address

Home Country (optional)
Home Address 1 (optional)
Home Address 2 (optional)
Home City (optional)
Home State (optional)
Home Zip Code (optional)

Work Contact Information

Work Email Address (optional)

or

Phone Number 1 (optional)

Phone Number 2 (optional)

Fax Number (optional)

Work Address

Work Country (optional)
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'

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 participation certificate.

Please note:

- **Payroll deduction changes:** You are able to log back into the online pledge system and edit your payroll deduction pledge prior to 11:59 pm CST on August 30, 2019.
- **Credit/debit card changes:** If you are submitting a credit card contribution, you will NOT be able to edit this gift after hitting 'Submit Contribution'.

[edit](#) **Personal Information**

Name John1 Doe
Home Address 124 Auburn Street, Peoria, IL 61615 US
Home Phone
Home Email kempf_erika_c@cat.com
Work Address 123 Cat Ln, Peoria, IL 61615 US
Work Phone
Work Email doe_john_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**

25.00 % Center For Prevention Of Abuse
25.00 % Big Brothers Big Sisters
25.00 % Children's Hospital of Illinois at OSF Saint Francis Medical Center
25.00 % Heart of Illinois United Way

[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**

Back

Print pledge summary

Logout

Thank You!



1.

Thank You, John1 Doe (johndoe1), 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](#)

Back

Print pledge summary

Logout

2.

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 2020):

25.00% to Big Brothers Big Sisters, 25.00% to Center For Prevention Of Abuse, 25.00% to Children's Hospital of Illinois at OSF Saint Francis Medical Center, 25.00% to Heart of Illinois United Way

 [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](#)

