



ePLEDGE STEP BY STEP GUIDE - NCR

New User

Step One: Create Account

Each organization has a unique URL for its ePledge site which brings you to your registration page.

- Some organizations have a Campaign Selection option – if applicable select the National Capital Region employees' registration page link from the options. This will bring you to your account registration page.
- Enter your workplace email address, create a password and enter the requested personal information.
- Check the **I'm not a robot** security CAPTCHA and then select **Register Under This Employer**
- Your screen will then open on the Welcome page. Please take a moment to view the video(s) or read the welcome message.

NOTE: If you used previously used ePledge at another organization you will need to update your account.

- On the Registration page click on **Follow these steps**
- Please ensure you follow the steps in order that they are provided
- If you encounter any difficulties in linking your account to your new workplace please contact ePledge support before proceeding.

You can change your password at any time by logging in and selecting the **My Profile** menu item.

Step Two: Making your Donation – Pledge Now

- Select **Pledge Now** from either the top menu or the button located on the Welcome Page
- Select your method of payment for your donation. You can choose:
 - Payroll Deduction,
 - PayPal; or
 - Credit Card: a one-time donation or monthly deductions.If you select Payroll you will be asked to enter your PRI or employee ID# in the next step, select **Next** once you have entered it;
If you select PayPal you will be asked in the final step to connect to your PayPal account;
If you select Credit Card you will be asked to complete the Payment Authorization section in the last step.
- Select **Next**

Attention!

For security purposes, ePledge will automatically log you out when it is inactive for more than 15 minutes

Do not use the browser "back" button (top left hand) as it will log you out and you will have to start again.

To move back and forth, use the ePledge menu on the left, or the buttons at the bottom of each page (cancel, back, next)



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Step Three: Selection you Charity(ies) - It's Your Choice

And no matter where you give, the total gift adds up on the top of the screen

- When you select **Payroll deduction** you are required to enter the amount per pay you wish to give to each of your selected charity (ies).
- When you select **PayPal** or **Credit Card** (one-time or monthly) you are required to enter the total annual amount you wish to give to your selected charity(ies).

United Way Ottawa and Centraide Outaouais

- Each has its community priorities identified – click on the box to show the priority/focus areas
- You have the option to direct to where the need is most (Community Fund)

HealthPartners

- You can give to all of the 16 member organizations or select which of the 16 you wish to give to.

ProjectBe

- ProjectBe aims to connect public servants with a cause in their local community by raising awareness, encouraging volunteerism and raising funds.
- ProjectBe allows public servants to support the cause or causes of their choice among these three pillars:
 - Youth mental health and addiction
 - Refugee settlement
 - Addressing homelessness

Other United Ways/Centraides across Canada

- A list of all of the other United Ways/Centraides in Canada can be accessed by clicking on the link and scrolling through the numerically sorted list.
- You may also choose to designate to any of the Regional United Ways (Prescott-Russell, Lanark Country or Renfrew County) by clicking on the associate link.
- If you wish you can also enter the associated United Way code or name in the search box under **Other Canadian Registered Charities**.

Other Canadian Registered Charity: *there is a minimum \$26 donation for all other registered charity donations.*

- All Canadian registered charities currently receiving funds through the campaign have been preloaded in the search engine. You can search by key words, registered charity number, city or postal code but Key word is recommended.
 - After you select **Search** all charities that match will appear below
 - Locate your charity and click on the **+ Add** button
 - Your selected charity will appear above with a spot to enter the amount you wish to donate



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- If your charity is NOT found, the **Manually Add a Registered Charity** option will appear.
 - Click on the **Enter Your Charity Manually** button.
 - The **Write-in Designation** page will open. This will enable you to search the CRA registered charity database by selecting [click here](#) (a separate web browser window will open). Choose your charity, click on the **Charity's detail page** to see their information. Copy and paste the information in the appropriate boxes (note field restrictions may require you to abbreviate. Every field must be completed.
 - Select **Add** once you are done copying the information and entered the amount you wish to donate.

Once you have completed entering your gift amount for each charity chosen, select **Next** located on the bottom of the page.

<i>Yearly amount</i>	<i>What it means per pay</i>	<i>GCWCC Gift Level</i>
<\$249	up to \$9.60 per pay	Pioneer
\$250 - \$499	from \$9.61 – \$19.23 per pay	Star
\$500 - \$999	from \$19.24 – \$38.46 per pay	Friend
1000 - \$4999	from \$38.47 – \$192.30 per pay	Leader
>\$5000*	from \$192.31 per pay	Major Donor

Step Four: Additional Information.

- Confirm your information for your charitable tax receipt
- Indicate, if applicable, where in your organization you work according to the organization levels identified by your organization by selecting the appropriate option in the dropdown box(es).
- For gifts above \$499, check the box if you wish to be recognized as a donor (this may include thank you calls)
- If you would like the charities that you have chosen to support through GCWCC to have your name and your gift amount, please CHECK the box.

Please note if you check this box, all the charities designated in this transaction will be provided with your name and gift amount. If you only want some of the charities to be advised of your donation, you must make separate transactions: 1) one transaction identifying only those charities to be informed of the donation(s) (boxed checked); and 2) one transaction where designated charities will not be informed of the donations (boxes not selected).

- GCWCC donors have the opportunity to indicate if they would like to receive information about the charitable campaign – To receive information please check the box provided and enter your personal email address



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- Select **Next** at the bottom of the page to advance

Step Five: Review and Confirm

Please verify the information that you have entered and if everything is correct select:

- for Payroll deductions: **Confirm**
- for Credit Cards: **Continue** – will bring you to CyberSource to enter and process your credit card
- for PayPal: **PayPal Check out** – will bring you to PayPal to pay for your Gift

You will receive an email confirmation thanking you for your donation. If you gave through a one-time credit card or PayPal donation, you will also receive a separate email with your tax receipt.

If there are corrections to be made select **Previous** to go back

Your Tax Receipt

If you have made a one-time credit card or PayPal donation

The donation will be processed in real time, just as a credit card purchase.

If you checked the option **Send me a tax receipt by e-mail** (pre-checked)

- Your tax receipt will be issued immediately to your preferred email address
- Print it for your records.
- If you mislay your printed copy, you can retrieve another copy by going to **My Donation History** in your ePledge account and click “Resend Receipt”

If you have made a pledge through payroll or monthly credit card deductions

Your payroll or credit card deductions will begin in January 2020.

- Your 2020 T4 (issued in late winter of 2021) will provide information on your payroll deductions.
- Your monthly credit card deduction tax receipt will also be issued in late winter, for the 2020 tax year. If you would like your tax receipt issued electronically please ensure you have entered your home email address in your Profile.

Thank you!