**United Way of Steele County**

**Pledge Processing Tip-Sheet**

Here’s a few tips as employees are completing their pledge forms & turning them in for internal processing & finalization:

* When completing your form – the ***TOTAL GIFT AMOUNT* should not** be rounded. If the employee is submitting his/her donation via the ***PAYROLL DEDUCTION*** option the TGA should match the “$\_\_\_\_ for \_\_\_\_\_ pay periods.” information on the form.
  + This would greatly save UW Staff processing time.
* **WORKPLACES:** Employees that decline to donate to this year’s campaign do not need to have their pledge forms returned to the UW. If you wish to keep them for any internal filing purposes you may.
  + This would greatly save UW Staff processing time.
* If the employee indicates they wish to submit via ***BILL ME*** or ***DIRECT PAYMENT***:

Please make sure their billing option (annually, quarterly, etc) is clearly selected

* + This would greatly save UW Staff processing time.
* If the employee indicates they wish to submit via ***CREDIT CARD***: please make sure that both the complete CC# and EXPIRATION DATE are written as clearly as possible.
  + We’ve had numerous CC donations submitted in past years that did not include the expiration date on the form. Please assure employees that their information is secure & it would help to improve processing time if we are not having to make follow up emails/phone calls to the donor to retrieve this information.
* All pledge forms should be signed & dated on the appropriate line.

**ADDITIONAL NOTES FOR WORKPLACE ENVELOPES:**

Please make sure that the information in the lower right corner of the large white envelopes is completed and accurate. This helps us to ensure that the workplace totals match our totals:

* Amount of checks/cash enclosed $\_\_\_\_\_\_\_\_\_
* Amount of Payroll Pledges $\_\_\_\_\_\_\_\_\_
* Amount of Pledges to be billed $\_\_\_\_\_\_\_
  + (this should be BILL ME/DIRECT PAYMENT total)
* Amount of Credit Card Pledges $\_\_\_\_\_\_\_
* Amount of Corporate Pledges $\_\_\_\_\_\_\_\_
* TOTAL DOLLAR AMOUNT $\_\_\_\_\_\_\_

**All envelopes (upon internal completion) should be delivered directly to:**  
US Bank, 132 W Broadway St, Owatonna MN