



## ePLEDGE STEP BY STEP GUIDE

### New User

### Step One: Create Account

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Each organization has a unique URL for its ePledge site which brings you to your Campaign Selection Page.

- Select your appropriate 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 or in the NCR at your 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

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

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- 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

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

Please note the link to Canada Revenue Agency's [Charitable donation tax credit estimator](#), which enables you to estimate the reduction on your income tax.

- 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).

#### **Local United Way (the name of your local United Way will display – it is based on your postal code)**

- You have the option to direct to where the need is most (Community Fund) or to the three priority areas.
- If you wish to give to a different United Way enter the associated United Way code or name in the search box under **Other Canadian Registered Charities**.

#### **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

**Any 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 (a separate web browser window will open). Choose your charity and the information on that will be displayed as well. 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
*Fundraising & Administration fees are capped at \$750 (gifts of \$5000 and over.)		

### Step Four: Additional Information.

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- If you are a leadership donor, and you wish to have your name published, please provide us with how you would like to have your name(s) appear. If you DO NOT want your name published you will need to UNCHECK the **Please Publish my name** in the Leadership Honour Roll box.
- 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).
- Select **Next** at the bottom of the page to advance



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### Step Five: Review and Confirm

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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 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 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!