

## United eWay Instructions & Best Practices

United Way of Greater Milwaukee  
3/2008



## End of Campaign Payroll Files

After your campaign is complete you will want to receive a file of the transactions to import to your payroll system to start deductions.

United Way will provide the information in a standard format, but we are able to add any information that you may need or provide a unique format.

We'll need to know whether you prefer:

1. Only payroll deductions
2. All donation types

While payroll deductions is the only gift type that the company is responsible for the full payment of the pledges, often times a company likes to mark the payroll file with the donation information, even if paid in full such as check or stock gifts.

We'll factor what you request or what we intuitively know about your employee file when creating the export but the standard format is as follows:

Employee ID  
First Name  
Middle Initial  
Last Name  
Number of payrolls per year for the donor  
Pledge type (payroll deductions and/or others)  
Frequency (one time or all)  
Total Amount Amount to be deducted per pay period

Please remember that any additional information you may need (codes, depts., systems) may need to be included on your original employee file so they can be passed back to you in the payroll file. United eWay provides the ability to transfer this information even if it is not factored in the campaign, simply to ease your import process on the back end.

In addition, when your campaign is closed and complete, you will receive a list of cash and check donations (if there are any) to aid you in recouping payments on those pledges. This list can be included in the envelope of payments that you will transfer to the United Way for processing. Also a full list of donations will be provided for your records.