

## **Off Season Administration**

While some companies nationally keep their websites open year round to encourage new hires to participate, locally we recommend that the website be shut down at the end of the campaign and any further transactions come through your human resources department, as they would for a paper-based campaign. The reason is because a donor could at any time make a change and you would need to be watching the records throughout the year for little or no activity.

The problem is that now that we are keeping donor transaction history for their review and most importantly to drive their pledge amount and designations in continuous giving campaigns, there is a need to keep any changes to transactions in your payroll system AND United eWay.

1. Change in donor information
2. Donors that leave the company
3. New hires and new pledges
4. Cancellation of a pledge
5. Change in a pledge amount or designation

### **Change in donor information**

Throughout the year, donors get change names, departments, titles, pay frequency and any number of other data elements stored on their eWay campaign record. Since no activity is produced from the eWay system after the campaign is complete – there is no need to update this information in eWay. When the new employee file is received for the next campaign, the information will be updated for them. This is the reason that the employee id is such an important field and mandatory that it stay the same year after year.

### **Donors that leave the company**

When the employee file for the new campaign is received these donors will not be included and then their records will not be transferred into the new campaign. There is no need to delete the transactions in eWay as the history of these donations is still required to keep a clean audit trail.

Your payroll system, however, needs to be updated to remove the pledges that you will no longer be collecting. In your accounting with the United Way you should denote gifts that have been deleted lessening your payments. Depending on the size of the gift and other factors, the United Way might attempt to contact the donor to continue payment.

### **New hires and new pledges**

Donors that are new to a company and login for the first time to the eWay campaign do not expect to see their donation history online. It is not imperative that we are given a copy of new

donation to enter into the system, while it's perfectly acceptable for the donor to start their relationship with the website after they make their first online gift.

The only exception is in the case of a continuous giving campaign. New donations should be reflected in eWay if your company has a program that automatically rolls over employee pledges from year to year because the company's communications will likely confuse these contributors and a gift assumed where the system functionality did not find one. Please provide donor name, gift type, gift amount, designation and acknowledgement question details if your company utilizes the continuous giving functionality. You do not need to provide these as they occur, once before the beginning of the campaign is enough.

### **Cancellation of a pledge**

If a donor cancels their pledge AND retains employment with the company, please provide this information to your eWay administrator before the campaign begins. We will want to make sure that the history is reflected appropriately as to not confuse the employee as well as to not rollover an invalid donation in continuous giving campaigns.

### **Change in pledge amount or designation**

If a donor changes their pledge amount, pledge type, designation or acknowledgement information it is important that we reflect the change appropriate in the eWay system. Please provide a list of changes to any pertinent information to your eWay administrator before the start of the campaign or submit periodically throughout the year.