

Employee Data Files

Providing a clean file of your employee data is the single most important thing that you can do to ensure a good campaign. Nothing kills a campaign faster than a donor not being able to login, or not having confidence that their information is treated securely. Any help you can provide by submitting the information to United Way in its final format is greatly appreciated and lessens the risk of error.

In order to import your employee file, United Way must convert the information you provide into a standardized format. You can always use the same format for your submission to United Way...which is greatly appreciated.

The first row of the file should include all field names exactly as they appear. All fields are required even if in the column everything but the field name is blank.

Specific Name of Field	Required?	Max # of Characters	Description
1-Donor Identifier	Yes	50	A donor identifier is required for all employee records. Most often we use the employee id in the donor identifier field. It must be populated in both fields as they serve different purposes within the system. Donor identifiers should never repeat within the file and should be the same for an employee year after year, including leading zeroes. It serves as the link between your current donor file and the history within the system.
2-Username	Yes*	50	A username and password scheme is created for each employee. The preferred scheme is one that can be described to the donor – for example: email address or first initial + last name. This allows the ECC to troubleshoot with potential donors without IT intervention. All usernames and passwords are case sensitive. Usernames must be unique within the file and cannot repeat. *In the case of an account that uses SSO login, usernames and passwords do not need to be provided to UW.
3-Password	Yes*	15	Password length must be between 6-15 characters. Password must contain at least 1 character from 2 of the following

			<p>3 groups: alpha, numeric, special. You may not include the double quote or the percent character. Passwords can be generated for you that are completely random. In that case, an email address becomes a required field, as the password detail must be generated from the system and sent directly to the donor.</p> <p>If using a portion of the employee's name in the username or password, remove spaces (ie: McAdams Jones) or apostrophes (ie: O'Leary) and convert to all one case (ie: mcadamsjones or oleary).</p> <p>*In the case of an account that uses SSO login, usernames and passwords do not need to be provided to UW.</p>
4-Prefix	Suggested	8	While not a required field, providing the prefix when available allows UW to appropriate create salutations such as Mr., Ms. and Dr. creating a more professional experience for the donor.
5-Last Name	Yes	50	Names should be in proper case (upper and lower) and each in their own field.
6-First Name	Yes	50	Names should be in proper case (upper and lower) and each in their own field.
7-Middle Name	No	50	Names should be in proper case (upper and lower) and each in their own field. Do not include a period following a middle initial.
8-Suffix	Suggested	4	When available a suffix should be provided in its own field. This can be particularly helpful in campaigns that include physicians to address the donor in an appropriate manner.
9-Nickname	No	50	Would be used to address informally such as "Robert" referred to as "Bob" when preferred.
10-Gender	Suggested	1	Providing a gender allows for a smooth transfer to our accounting department, as for new employees a record must be created and salutations established. Please provide wherever possible. Allowable entries are M=Male F=Female N=Not provided. If not provided the UW may contact you on names where a determination cannot be made.
11-Employee Number	Required	14	An employee number is required for all

			employee records. Most often we use the employee id in the donor identifier field. It must be populated in both fields as they serve different purposes within the system. Employee numbers should never repeat within the file and should be the same for an employee year after year, including leading zeroes. It serves as the link between your current donor file and the history within the system.
12-Social Security Number	No	9	Unless necessary to pass this information to UW so it can be received on the backend to facilitate import to your payroll system, or in which case the last four digits are the preferred password – please do not give us an employee's social security number. It is not a requirement for donation and information that we would prefer not to have as it makes employees uncomfortable.
13-Home Address Line 1	No	100	If any portion of the home address is provided, than all fields must be provided. Home address can be included if you wish to make entry of this information easy on the donor. The only case where a home address is required is if the donor asks for a deferred bill or pays with a credit card, at which time the donor will be required to enter the address online. In addition, if a donor gives at a level which earns them the impact card or other such promotion, they will be requested to provide the information during the pledge experience. If the home address is provided, it should be in proper case with each of its data elements in the appropriate field.
14-Home Address Line 2	No	100	See above
15-Home City	No	50	See above
16-Home State	No	2	See above – use 2 digit standard state abbreviations
17-Home Zip Code	No	5	See above
18-Home Zip Code Ext	No	4	See above
19-Home Country	No	2	See above – use “US” for United States in all caps
20-Home Phone	No	15	See above – if provided do not include formatting characters (ie: 4142638100)

21-Home Email Address	No	80	See above
22-Work Address Line1	Suggested	100	The primary work location of each employee, while not required, is suggested. It allows for ease of reporting throughout your locations.
23-Work Address Line2	Suggested	100	See above
24-Work City	Suggested	50	See above
25-Work State/Province	Suggested	2	See above – use 2 digit standard state abbreviations
26-Work Zip Code	Required	5	A valid work zip code for every employee is required. United Way of Greater Milwaukee adheres to the standards set by United Way of America regarding transfer of results to each that govern the zip code where employees are based.
27-Work Zip Code Ext	No	4	See above
28-Work Country	Required	2	Use “US” for United States in all caps.
29-Work Phone	No	15	See above – if provided do not include formatting characters (ie: 4142638100)
30-Work Email Address	Required*	80	In order to send login information to employees and confirmation emails after pledge an email address must be provided. It is also commonly used as the username on the employee record. *If single sign-on or other method is used for login and no communications need to be sent, the work email address is not required.
31-Mailing Address Preference	No	1	
32-Annual Salary	No	10	Annual salary is NOT required. If provided, it can be used to present “% of salary” type questions to potential donors. Particularly helpful in continuous giving campaigns with the new amount being calculated without donor intervention. If provided do not include formatting characters (ie: \$9.00 should read 9.00)
33-Hourly Pay Rate	No	10	Hourly Pay Rate is NOT required. If provided, it can be used to present “% of salary” type questions to potential donors. Particularly helpful in continuous giving campaigns with the new amount being calculated without donor intervention. If provided do not include formatting characters (ie: \$9.00 should read 9.00)

34-Paid Time Off Rate	No	10	Some companies offer "Paid Time Off" as a way to pledge. In this case the donor gives an amount of their time off, calculated based on the Paid Time Off Rate and returns with a gift amount. The company is then responsible for paying the United Way on behalf of the donor's time and reducing their benefit in their HR system. If provided do not include formatting characters (ie: \$9.00 should read 9.00)
35-Pay Period Code	Yes	10	Your pay period code is the same as your number of pay periods per donor. A donor paid monthly would be "12", twice monthly would be "24". Note: this information is crucial to determining the total amount of a donor's pledge and can be detrimental if not correct on each employee's record. It is not uncommon that employees receive payroll on different schedules within the same company. Each employee's record in the file should reflect their appropriate number of pay periods that will receive deductions.
36-Company Level Code	Yes	20	Company Level Codes drive the rich reporting system from eWay. The list of departments or divisions is requested pre-campaign from the United eWay staff contact. A tree is then built into the system that includes codes for each level (ie: 10-Marketing, 20-Sales). You can provide the code if one already exists. That code is then stored in this field aligning each potential donor to its appropriate company level. In the above example this field would include "10" or "20". Your company level tree moves with you from campaign year to campaign year. You may also be asked to simply review and edit your tree from the previous year instead of resubmitting in total.
37-Functional Hierarchy Level Code	No	20	In addition to the company level, if another sub-grouping of employees is desired to aid in reporting, a second tree will be created and the codes to store in this field will be provided.
38-Coordinator Hierarchy	Yes	20	This field drives the "dashboard"

Level Code			reporting that shows on the donor site for the coordinators in your campaign. The default value for this field is "ALL" in capital letters. If further subsets are required to show specific donors to specific coordinators you will be provided the data to store in this field.
39-Leadership Recognition Name	No	65	We do not pre-fill these fields for donors at this time.
40-Anonymous	No	1	We do not pre-fill these fields for donors at this time.
41-Spouse Name	No	65	We do not pre-fill these fields for donors at this time.
42-Spouse Employer	No	65	We do not pre-fill these fields for donors at this time.
43-Spouse Pledge Amount	No	10	We do not pre-fill these fields for donors at this time.
44-Custom Field 1 Description	No	50	Sometimes a company will want to show data elements to a donor on the pledge site. The custom field description and corresponding value fields are used to store the info. In addition, some companies may require certain other fields "pass through" the eWay system for use in their payroll systems after the campaign is complete. These fields can also store the info, so when your payroll file is exported it can include these fields.
45-Custom Field 1 Value	No	50	See above
46-Custom Field 2 Description	No	50	See above
47-Custom Field 2 Value	No	50	See above
48-Custom Field 3 Description	No	50	See above
49-Custom Field 3 Value	No	50	See above
50-Custom Field 4 Description	No	50	See above
51-Custom Field 4 Value	No	50	See above
52-Custom Field 5 Description	No	50	See above
53-Custom Field 5 Value	No	50	See above
54-Custom Field 6 Description	No	50	See above
55-Custom Field 6 Value	No	50	See above
56-Custom Field 7 Description	No	50	See above
57-Custom Field 7 Value	No	50	See above
58-Custom Field 8 Description	No	50	See above

59-Custom Field 8 Value	No	50	See above
60-Custom Variable 1	No	100	Much like custom field descriptions, custom variables can be used to present information to the potential donor or pass through information to your payroll file. Custom Variables can be numerical, and can be used to calculate results in payroll ask questions, etc.
61-Custom Variable 2	No	100	See above
62-Custom Variable 3	No	100	See above
63-Custom Variable 4	No	100	See above
64-Custom Variable 5	No	100	See above
65-Custom Variable 6	No	100	See above
66-Custom Variable 7	Not available	100	United Way will use this field to house the name of the United Way that is the default for the work zip code of the employee.
67-Custom Variable 8	Not available	100	United Way will use this field to house the url for the website of the United Way that is the default for the work zip code of the employee to present to the donor for their use.
68-System Administrator User Name	No	50	In addition to dashboard reporting, the coordinator(s) within a company may need to access the administration site. Providing the admin username (not the same as the donor site username) in this field and configuring their permissions would allow a coordinator to open a browser in the admin site from the donor site. United Way will provide this information if applicable.
69-Coordinator Hierarchy Role Code	No	20	Provided by United Way and used to drive permissions in reporting for admins.
70-Change Password Required at Next Login	No	1	Field can be left blank. If changing passwords is a requirement, UW will run a job that will set this field for all employees. Beneficial to do right before the campaign kicks off since testing will be that much more work if passwords are needing reset at every test login.
71-Last Year's Total Annual Gift	No	10	If this is your first year utilizing United eWay for your campaign and you wish for your donors to see the amount of the pledge they gave in the previous year, it should be stored in this field. If you have history within the United eWay system it is carried forward for each donor

			automatically and the transaction from the previous year shown.
72-Donation Ask Amount	No	10	If utilizing a “fair share” or “suggested giving” program or creating a specific goal as part of a leadership or other giving program, the amount of the ask should be provided in this field. Do not include formatting characters (ie: \$1,200 should be provided as 1200).
73-Donation Edit Type	Yes	1	Preferred value is “3” which means that a donor can edit their campaign while the campaign is running. After the site is turned off they would need to contact their payroll department to make changes. Other values are “1” for never and “2” for once.
74-Donation Count Limit	Yes	2	The donation count limit is the number of pledges that a donor can make in a single campaign year. By default we set this number at 1. In certain campaigns we have allowed for more than one transaction. When deciding, the campaign should consider that having more than one gift be available will mean that more than one record per employee will arrive in the recap of the campaign and if all gift types are being uploaded to your payroll system, it may cause error. Even if set higher than 1, only one payroll deduction will be allowed per donor – with the option to edit the gift amount and designations.
75-Donor Group Name	Yes	100	For national and regional campaigns – the donor group name will be added to your file and is the name of the United Way which has a location participating in the campaign. Any change of website content that should be displayed to a subset of donors must be driven by its own unique donor group. The value of this field must be exact as it has been configured in the UW admin site. Work with UW to determine the correct value or leave blank and UW will provide.
76-Coordinator Hierarchy Reporting Code	Yes	20	Leave blank – UW will configure manually
77-Coordinator User Name	No	50	Leave blank – UW will configure manually

78-Registration Custom Field1 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
79-Registration Custom Field 1	No	50	Leave blank. Information may be collected on the donor site yearly.
80-Registration Custom Field 2 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
81-Registration Custom Field 2	No	50	Leave blank. Information may be collected on the donor site yearly.
82-Registration Custom Field 3 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
83-Registration Custom Field 3	No	50	Leave blank. Information may be collected on the donor site yearly.
84-Registration Custom Field 4 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
85-Registration Custom Field 4	No	50	Leave blank. Information may be collected on the donor site yearly.
86-Registration Custom Field 5 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
87-Registration Custom Field 5	No	50	Leave blank. Information may be collected on the donor site yearly.
88-Registration Custom Field 6 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
89-Registration Custom Field 6	No	50	Leave blank. Information may be collected on the donor site yearly.
90-Registration Custom Field 7	No	100	Leave blank. Information may be collected on the donor site yearly.
91-Registration Custom Field 7	No	50	Leave blank. Information may be collected on the donor site yearly.
92-Registration Custom 8 Description	No	100	Leave blank. Information may be collected on the donor site yearly.
93-Registration Custom Field 8	No	50	Leave blank. Information may be collected on the donor site yearly.

All files can be submitted to United Way in Excel (.xls) or Text (.txt) formats. Files should be password protected if submitted by email, and telephone your contact to provide the password.

A blank excel file containing the field names above is available upon request.

Both United Way of Greater Milwaukee and United eWay pass security audits yearly and treat the protection of your data as a priority.