

United Way of Greater Rochester Payroll Deduction Program

United Way of Greater Rochester addresses critical challenges by connecting local people in need with evidence-based programs, strategic funding investments, community initiatives, volunteer support and community leadership to direct resources and solve problems.

One way your company can support the Greater Rochester community through a United Way workplace campaign is by providing the option of payroll deduction for employee donors.

The set-up process

1. Notify your United Way campaign representative and your payroll office and your company's payroll processor (if applicable) about offering payroll deduction at your company.
2. Begin your United Way campaign with the help of your campaign representative.

Closing your campaign

- Traditional (with pledge forms only) – at the end of your company's United Way campaign, forward all the top (white) copies of the pledge forms to your payroll office for input to your payroll system. Send the yellow copies to United Way through the campaign workplace envelope. The donor retains the back (pink) copy.
- Electronic campaign (epledge) – your company will receive an Excel file from United Way with pledge information; please send to your payroll office/processor for input.
- Hybrid campaign (both epledge and paper pledge forms) – your company will receive an Excel file from United Way with pledge information; please send to your payroll office/processor. The file will include the payroll information for both employees who pledged electronically and those who pledged by paper.

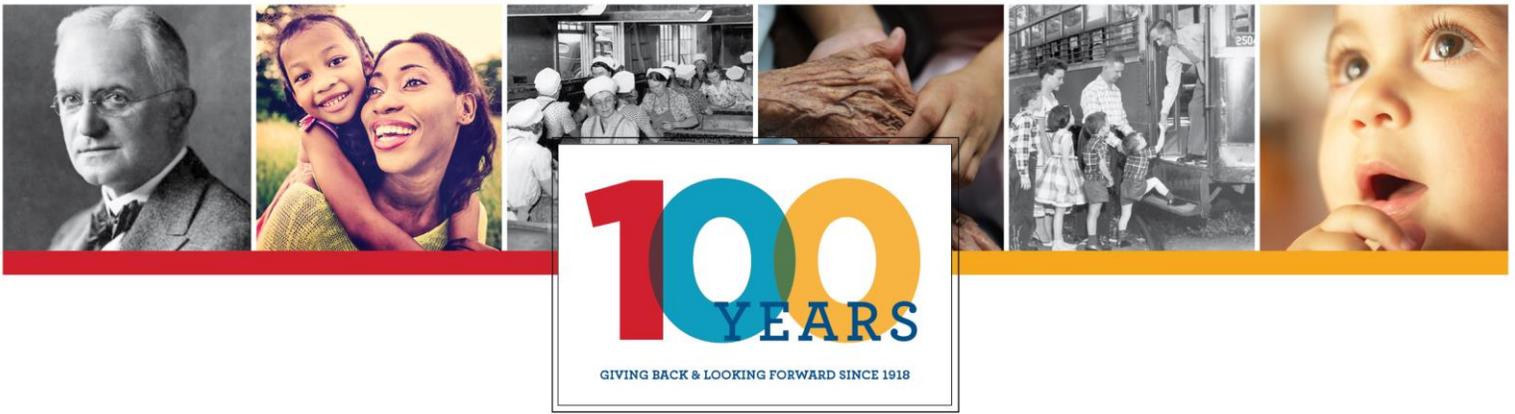
Beginning payroll deductions

- Confirm that United Way has the correct billing address and the name of the contact person that handles payroll for your organization.
- A payroll statement will be generated by United Way and sent to your company each month.
- When you receive the first payroll statement for the new campaign, please compare the pledge total that appears on your statement with your payroll and campaign records.
- Record the time period that you start new deductions for each campaign year.

There are two suggested payroll deduction periods:
June 1 to May 31 (spring campaigns)



United Way
of Greater Rochester



January 1 to December 31 (fall campaigns)

Payment information

Payroll payments can be made by either check, EFT, or credit card.

To pay by check: To ensure your payments are properly credited to your account, please enclose the bottom portion of your monthly statement with your payment. If you need additional remittance slips to send payments to us more frequently than monthly, please call us at (585) 242-6535. Please send all payments to the following address:

**United Way of Greater Rochester
PO Box 30029 Rochester, NY 14603-3029**

If you would like to pay by EFT or credit card: Call (585) 242-6535 for information.

Final payroll deduction instructions

At the end of the payroll deduction period please contact United Way of Greater Rochester to confirm when deductions for one year have been completed and deductions for the next campaign are starting. The following steps should be taken to inform the United Way that this has been done:

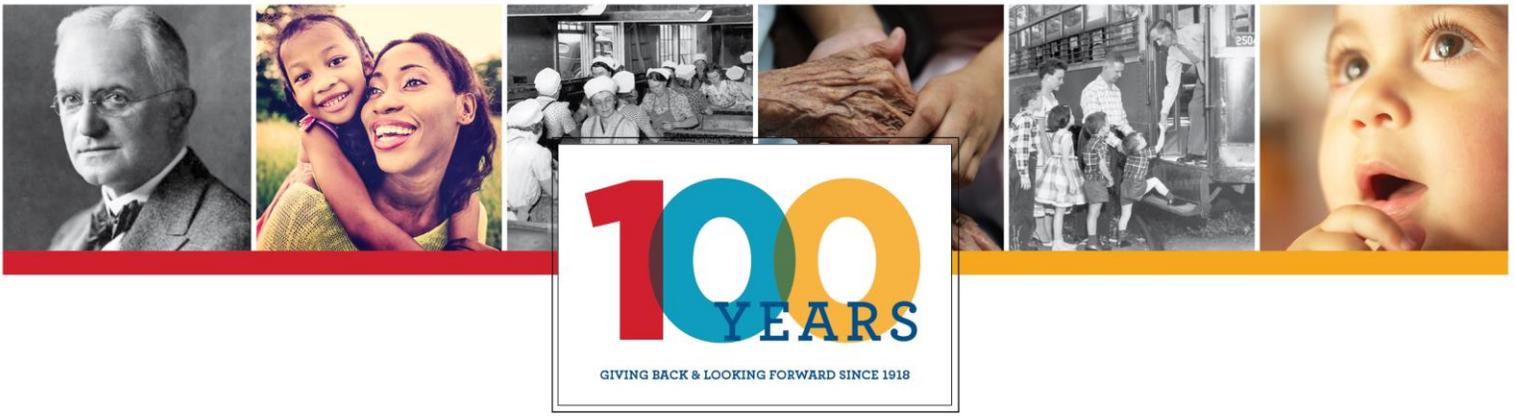
1. Reconcile your total United Way of Greater Rochester payroll deductions for the year to the payments made to United Way of Greater Rochester for that time period. Any amounts which were withheld from employees' pay and not already paid to the United Way of Greater Rochester should be remitted at this time.
2. Notify United Way of Greater Rochester in writing (monthly or at the end of the deduction period) to help us adjust our records if amounts appear in the pledge balance on your monthly statement but were not withheld from an employee's pay (due to terminations, cancellation of pledges, etc). This should be done by indicating the amount to be adjusted in the "Pledge Increase/Decrease" column of the monthly remittance statement. A signature is required on all adjustments.

If United Way of Greater Rochester is not paid the entire pledge balance for a year or asked to adjust for the difference, United Way will assume that these balances were withheld from your employees' pay. United Way has a legal obligation to collect any amounts which were withheld from employees' pay but not remitted to the organization. Please take the time to inform us of all such adjustments.

See below for a company example of payroll end of campaign year procedures.



**United Way
of Greater Rochester**



Example: Procedures for ending payments for a campaign year (spring campaign)

ABC Company ended their payroll deduction for campaign year 2013 with the May 20, 2014 payroll. They began payroll deduction for their 2013 campaign in the June 3, 2013 payroll.

ABC's Employee payroll pledge for the 2013 campaign year was:	\$11,035.29
ABC's payroll deductions for the 2013 campaign year were:	\$10,082.50
The amount remitted to the United Way for that time period was:	\$9,901.25
Amount remaining for last payment for the 2013 campaign year:	\$181.25
ABC Company noted the remaining pledge statement balance was:	\$1,134.04
The difference was due to terminations/pledge cancellations, etc.:	\$952.79

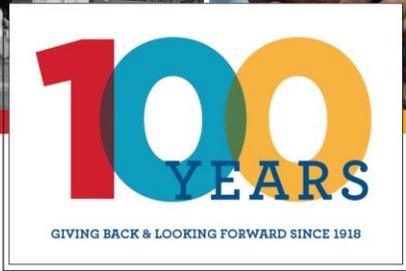
ABC Company completed the "Pledge Increase/Decrease" column with the \$952.79 amount (with a signature).

All amounts for the 2013 campaign have been remitted and any leftover balances will be adjusted by the United Way.

Thank you for your support and generosity as we work together to improve lives in the Greater Rochester community.

**For questions, concerns or additional information,
please call the United Way Accounts Receivable department at (585) 242-6535**





**United Way of Greater Rochester
and Surrounding Counties**
Includes the United Ways of Genesee County,
Livingston, Ontario, Wayne and Wyoming
Dept 116066, P.O. Box 5211 • Binghamton, NY 13902
(585) 242-6400 • FAX: (585) 242-6500
www.uwrochester.org

STATEMENT DATE	06/01/14
ACCOUNT NO.	123456

ABC Company
Payroll Department
123 Any Street
Rochester, NY 14600

*Thank you for your donation.
Your support is changing lives today.*

CAMPAIGN YEAR	EMPLOYEE PLEDGE	PAYMENTS / ADJUSTMENTS RECEIVED THROUGH ABOVE STATEMENT DATE			PLEDGE BALANCE
		DATE	DESCRIPTION	AMOUNT	
2013	11,035.29		Total Received	9,901.25	1,134.04
<i>To make a credit card payment online, please go to our website at www.uwrochester.org/payment.</i>					

PLEASE DETACH BOTTOM PORTION OF THIS STATEMENT AT PERFORATION AND RETURN WITH REMITTANCE IN ENCLOSED ENVELOPE



**United Way of Greater Rochester
and Surrounding Counties**
Dept 116066, P.O. Box 5211
Binghamton, NY 13902
www.uwrochester.org

STATEMENT DATE	06/01/14
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123456

CAMPAIGN YEAR	EMPLOYEE PLEDGE BALANCE	PAYMENT AMOUNT ENCLOSED	PLEDGE INCREASE / (DECREASE)	PAY PERIOD DATE(S)
2013	1,134.04	181.25	(952.79)	May 2013

Please sign below for any pledge increase / decrease

Name: Jane Doe Title: Payroll Supervisor

Note:

- Please indicate in the appropriate column adjustments to be made to reflect:
 - A) Uncollected pledges (Pledge Decrease) - () -
 - B) Additional gifts from your employees (Pledge Increase)
- Please make payments in accordance with your payroll period (i.e., Weekly, Monthly, etc.) and indicate the time period covered by this payment.

ABC Company
Payroll Department
123 Any Street
Rochester, NY 14600



**United Way
of Greater Rochester**