

## ENVELOPE COMPLETION INSTRUCTIONS

1. Check that pledge forms are signed and dated on top and bottom portion, for donor giving by cash/cheque(s) make sure they match the pledge form, staple to top of pledge form.
2. Sort pledge forms by payment type, Payroll Deduction, Cash, Cheques, Credit Cards.
  - **Payroll Deduction** – Ensure donor has completed both the top part of the form and the bottom perforated part. Top goes to United Way, bottom to your payroll when you close the campaign.
  - **Cash** - Staple cash donation to the top of the pledge form.
  - **Cheques** - Ensure that cheques are signed and made payable to the 'United Way'. Staple cheque to top of the pledge form.
  - **Visa/MasterCard/AMEX** – We require the exact name as it appears on the card, the card number and expiry date and that the pledge form is signed.
3. **Front of the Envelope:**
  - Fill in company name and address.
  - Record your name and telephone number along with the payroll contact person.
  - Fill out the donor names and record payment type in the proper column.
  - Fill in the Employee Donation Totals for each column.
  - Enclose special event dollars in a separate envelope and place in large recording envelope with pledge forms. *(Many campaigns host events throughout the year, those donations may have already been given to the United Way office for processing).*
  - The United Way office will complete the Employee Giving, Corporate and Special Events totals located in the bottom corner of the envelope.
4. **Closing the Campaign with United Way Sponsored Employee/Staff:**
  - Call your United Way contact person and arrange a meeting date.
  - Review all envelope contents together ensuring there are no discrepancies.
  - Seal envelope.
  - Deliver all perforated tear offs from the completed pledge forms to your payroll department.

**THANK YOU for your valuable time!**