**Tips for filling out the Employee Summary Sheet**

If you want a quick and easy Excel spreadsheet, please visit our website: [www.unitedwayblackhills.org/campaign](http://www.unitedwayblackhills.org/campaign), scroll down and click on Employee Summary Sheet. Please list your business name at the top.

Auto sum your totals **(minus the sample lines)**. Please print 2 copies: (1) return the original sheet to UWBH in packet and (2) give one to your payroll department.

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If you prefer to use the paper copy, PLEASE PRINT names so they are legible. Everyone’s thank yous depend on this.

Fill out the employee names (First name Last name)

Refer to the 4 sample lines, one is filled out for each pledge type.

**Please make a copy of this form, return the original in packet to UWBH and give the copy to your payroll office.**

**Payroll Deduction pledges:**

Add up the individual’s **total** pledge, whether it’s per pay period, “A Dollar A Day for United Way” or a FairShare Gift. Put this total in the Total Annual Payroll Deduction column (the 3rd column under Payroll Deduction Summary) and fill in the # of pay periods that person has. Also fill in the Payroll Deduction Amount, which is their total divided by the # of pay periods.

**Cash/Check pledges:**

List the cash or check donation amount in the 1st column under Cash/Check.

For Check: List the check # and the check date.

For Cash: Write “Cash” in the 2nd column.

**Direct Bill pledges:**

List the dollar amount that the employee wishes to be billed. A home mailing address **must** be provided on their pledge form, by the employee, for bills to be sent to them. **A minimum donation of $100 is required for this option.**

**ACH/EFT Withdrawal pledges:**

List the dollar amount that the employee wishes to have withdrawn monthly from their checking account, which will begin on January 20th. A voided check **must** be provided by the employee unless they are continuing their ACH withdrawals from the previous year, provided that, there have not been any account/routing# changes.

**Credit Card pledges:**

**Employee: Fill out a pledge form to be returned in the packet or insert a copy of their online receipt. If filling out a pledge form, they must notate the date of their credit card transaction. \*Do not list credit card information on the form.**

**Processor: List the dollar amount that the employee donated.**