CHARITIES AT WORK ADMINISTRATOR GUIDE

Your workplace campaign guide

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Charities At Work

Charities at work is a web-based portal that supports your HealthPartners workplace campaign. This portal allows employees to pledge online, eliminating the need to distribute, collect, and process paper pledge forms. This secure online interface allows communication directly to employees and provides real-time pledge tracking.

Charities At Work is easy to use, and assistance is provided by a HealthPartners staff throughout your campaign.

What are the benefits?

- Eliminates the need for paper pledge forms, saving time, paper and the environment
- Increases accuracy and confidentiality of donor information
- The donor can view past giving and to update their information and submit their pledge directly
- Donations are processed automatically, with receipts for credit card gifts emailed directly to the donor and a payroll report generated for Human Resources to import directly into the payroll system
- Can generate a report of all employee gifts for incentive draws and status updates with one click
- Targets reminder communications to those who have not yet gone on the tool

What is required?

- Employee information 2 weeks prior to campaign kick-off including full name, email address, and employee ID
- Collaboration with your IT support team to whitelist emails and ensure internet access for employees
- Collaboration with your committee/communications team to create an effective communications plan to support role out of the tool

- Charities at Work training for canvassers and Charities at Work Administrators
- Continued efforts in canvassing employees and sharing communication about HealthPartners and the tool

Employee Information

Basic employee information is required to create unique, secure user IDs and passwords specific to each employee. Please send this information to HealthPartners in an Excel document with the following fields:

Employee ID	First Name	Last Name	Gender (if available)	Department (if available)	# Pay Periods Annually	Email Address	City	Province	Postal Code	Preferred language
160655	Lisa	Poulin	F	Finance	26	lpoulin@healthpartners.ca	Ottawa	ON	K2P 1L4	EN

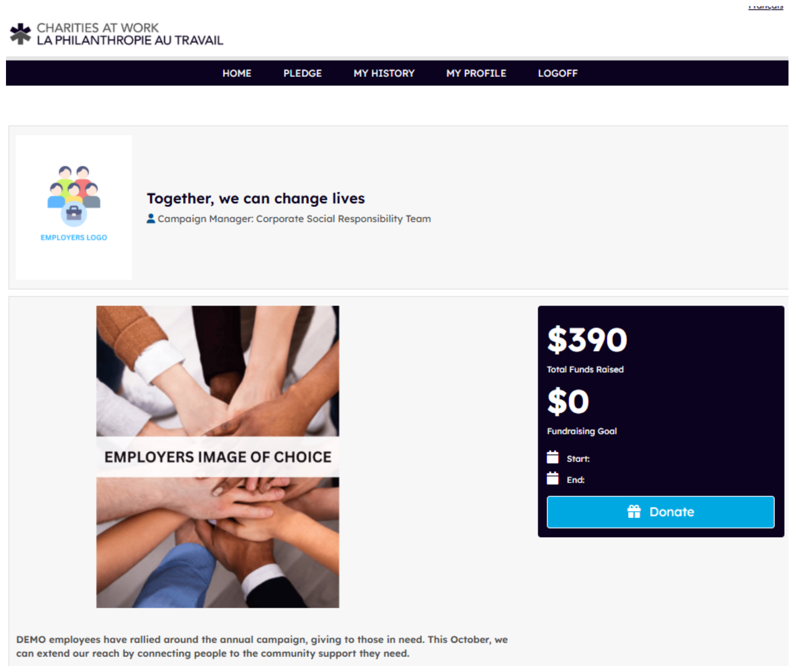
Providing all the above information assists HealthPartners in matching employees to the correct account, avoiding duplication of records, and ensuring accurate information.

Note: Please ensure the first, middle and last names are separated into distinct fields.

Access and Login

HealthPartners will send an email to employees on campaign launch with a personalized link containing embedded login information. When employees click the link, it recognizes who they are and logs them into the secure interface automatically. **NOTE:** Please ensure emails from info@healthpartners.ca are whitelisted and not blocked by your organization’s IT department.

Once successfully logged into Charities at Work, employees will be taken straight to their Home page which will show your company's logo and details about the campaign.



As an administrator you will have two menus available to you:

1) Workplace Donor
2) Charities At Work Administrator

You can switch between these menus by selecting the appropriate role at the bottom right of your screen.

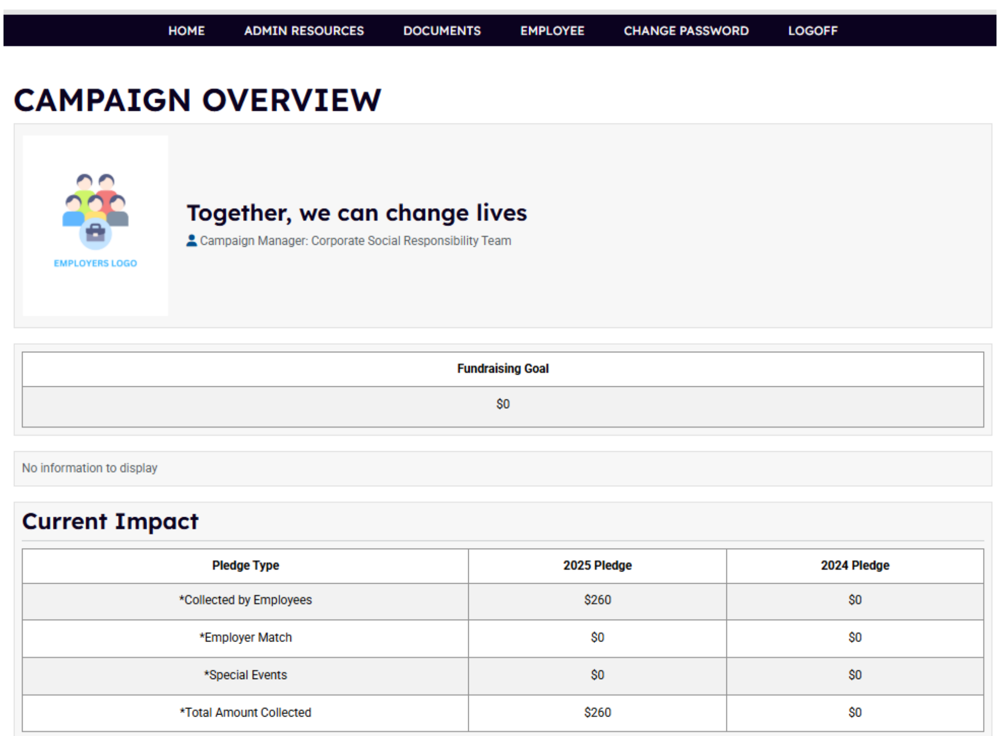
Charities At Work Administrator Menu

- **Home** – provides navigation information
- **Change Password** – allows you to update your password
- **Admin Resources**
  - Dashboard – allows you to track the status of your workplace campaign
  - Reports – allows you to run campaign reports
  - Special Event Reports – allows you to run special events campaign reports

- **Documents** – allows you to securely upload employee information for HealthPartners
  Employee
-
    - E-mail Employees – allows you to send an email to all employees, employees who have given, or those who have not yet pledged
    - Employee Gifts – allows you to search for a specific employee, see their current pledge, enter a pledge on their behalf, delete a pledge made in error, and resend confirmation emails
    - Employees – allows you to search for an employee
- **Logoff** – logs you out of the system

Campaign Dashboard

Allows you to view a snapshot of where your campaign is at:



HOME ADMIN RESOURCES DOCUMENTS EMPLOYEE CHANGE PASSWORD LOGOFF

CAMPAIGN OVERVIEW

EMPLOYERS LOGO

Together, we can change lives

Campaign Manager: Corporate Social Responsibility Team

Fundraising Goal
$0

No information to display

Current Impact

Pledge Type	2025 Pledge	2024 Pledge
*Collected by Employees	$260	$0
*Employer Match	$0	$0
*Special Events	$0	$0
*Total Amount Collected	$260	$0

Reports

A variety of reports are available to help you monitor your campaign

Reports

To extract a report, you must select the report of your choice from the options below and press *Submit*. Once your report is submitted, it will appear in *My Downloaded Reports*.

- ◉ **Campaign Level Detail/Rapport de campagne détaillé**
  Campaign Level Detail Report - Rapport de campagne détaillé
- ○ **Donor Choice Summary/Sommaire choix des donateurs**
  Donor Choice Summary - Sommaire choix des donateurs
- ○ **Employee Donor Details/Détaillé employés donateurs**
  Detailed Report employee donors - Rapport détaillé employés donateurs
- ○ **Payroll Deduction/Déduction à la source**
  Payroll Deduction - Déduction à la source
- ○ **Personal Time-off/Congé personnel**
  Personal Time-off - Congé personnel

SUBMIT

Simply select the report you would like to run and hit Submit.

Your report will take a moment to generate and then appear under My Downloaded Reports.

My Downloaded Reports

In order to download a report right click the link and save the report on your computer. To get an up-to-date report, press ***Refresh***.

If your file opens with all of the data in a single column, you can easily re-format the data into columns. To do this: go to the ***Data*** menu and select ***Text to Columns*** under the Data Tools group, select ***Delimited*** in the pop-up window and then select ***Semicolon***. Click ***Next*** and ***Finish***.

REFRESH

☐ Show Outstanding

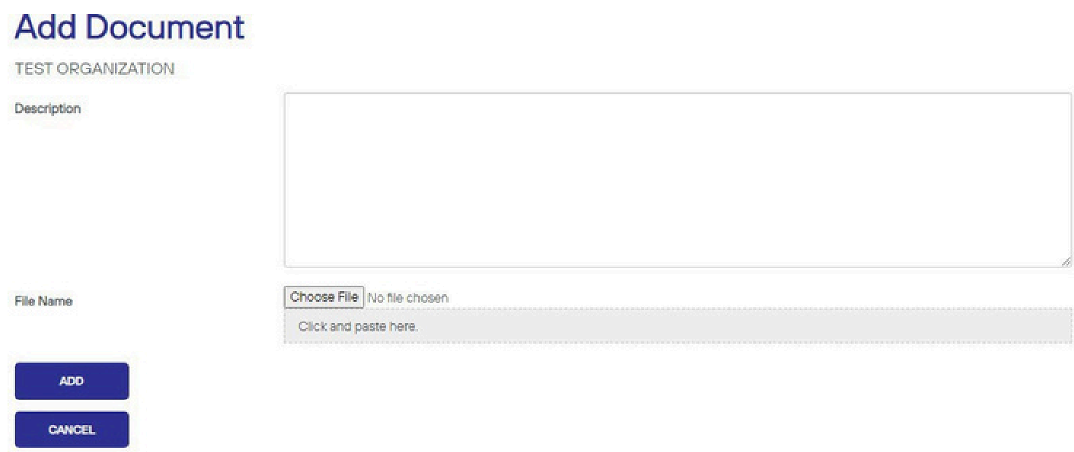
Report Run	File	Date	Type
Donateurs dans la campagne / Donor Detail Demo	Demo Canada - Pledge Transaction Report	07/17/2024 08:42:22 AM	csv
Sommaire, organismes	Demo Canada - Pledge Donor Choice Summary Report	07/09/2024 02:52:15 PM	csv
Donateurs dans la campagne / Donor Detail Demo	Demo Canada - Pledge Transaction Report	07/09/2024 02:52:11 PM	csv

DELETE

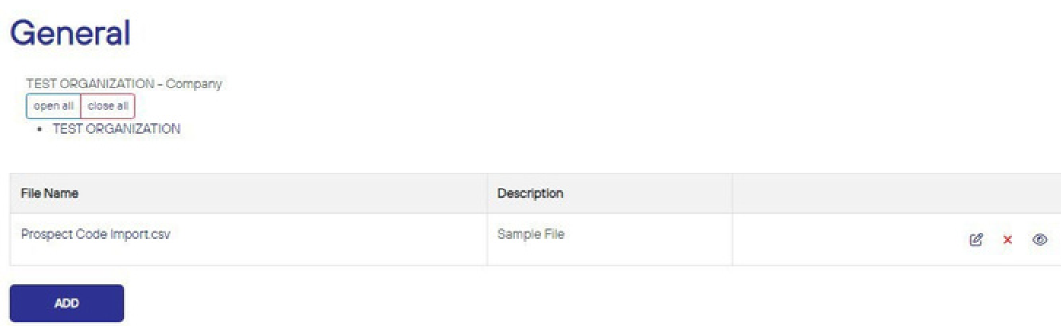
CANCEL

Documents

Documents is a secure dropbox for employee information such as your employee file for setting up the system. Using a dropbox is a much safer way to share sensitive data than by email or memory stick. A document is added to the dropbox by selecting add, add a description of the file, and find the file as you would if attaching it to an email.



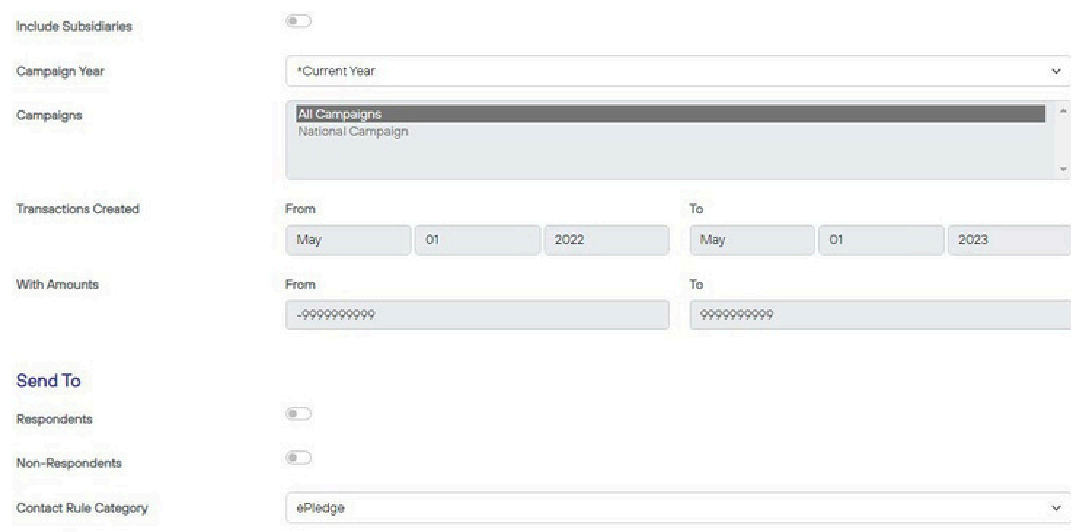
Once your document is added it is also available to HealthPartners staff working with you on your campaign.



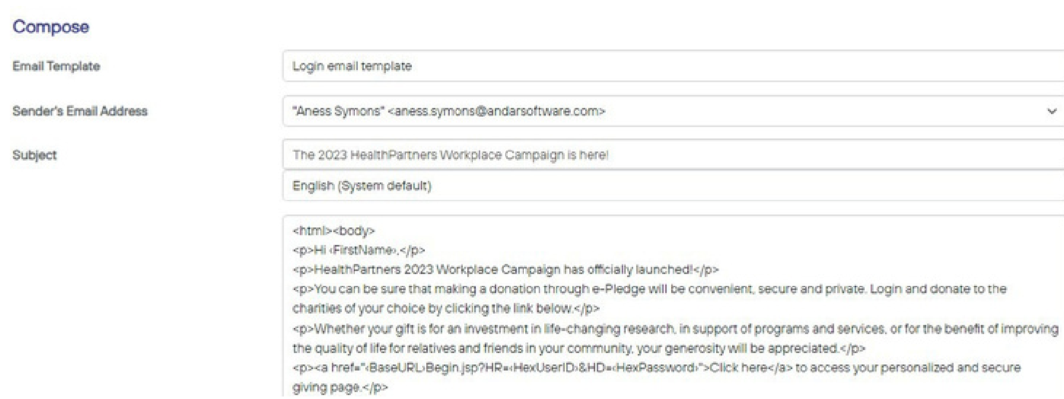
Employee

E-Mail Employees

This option allows you to generate an email to the employees at your organization. The email can be set to go out to all employees (including those at other branches/subsidiaries), only those who have responded (made a pledge or indicated no gift this year), or non-respondents (those with no pledge on record).

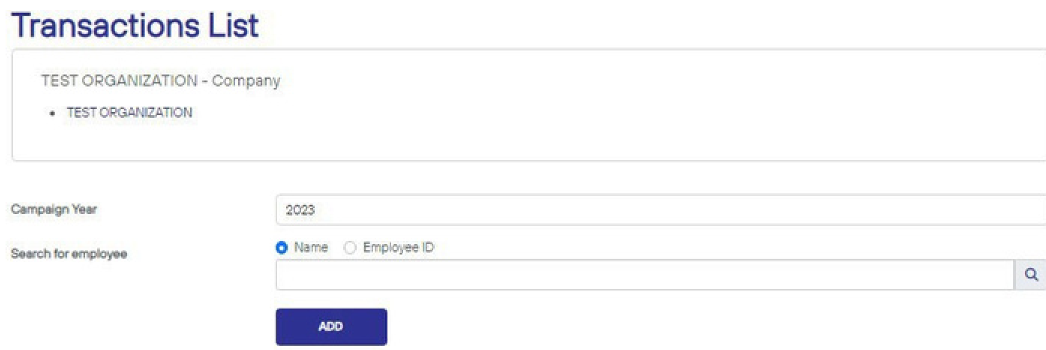


You may select the template *None to create your own email or select one of the existing templates and modify to have the encrypted login link included in the email.

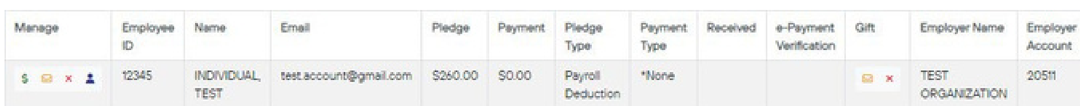


Employee Gifts

Allows you to search for employees by name:



When an employee is found, a variety of information and action items become available:



Manage	Employee ID	Name	Email	Pledge	Payment	Pledge Type	Payment Type	Received	e-Payment Verification	Gift	Employer Name	Employer Account
$	12345	INDIVIDUAL, TEST	test.account@gmail.com	$260.00	$0.00	Payroll Deduction	*None				TEST ORGANIZATION	20511

	The dollar sign allows you to enter a pledge on behalf of the employee. The system tracks that the pledge was entered by an administrator rather than directly by the donor.
	The first envelope allows you to resend a login or reminder email to the employee. The email you send will have a fresh link with the user id and password encrypted in it.
	The first X allows you to delete an employee who no longer works for your organization. Deleting the employee will remove them from your reports and prevent them from receiving employee emails.
	The person allows you to send a reset password link to the employee should they have trouble accessing the system. Once a password is reset the previously send encrypted email links will no longer work.
	The second envelope allows you to resend the confirmation email for the pledge on file. The email that is sent is an exact replica of the original confirmation email.
	The second X allows you to delete the existing pledge for that employee. If the X is not displaying it means the pledge has been processed and you need to notify HealthPartners to delete it.

Change Password

When changing your password, it must contain the following:

- 8-50 characters in length
- At least one number
- At least one upper case and one lower case letter
- At least one special character

Logoff

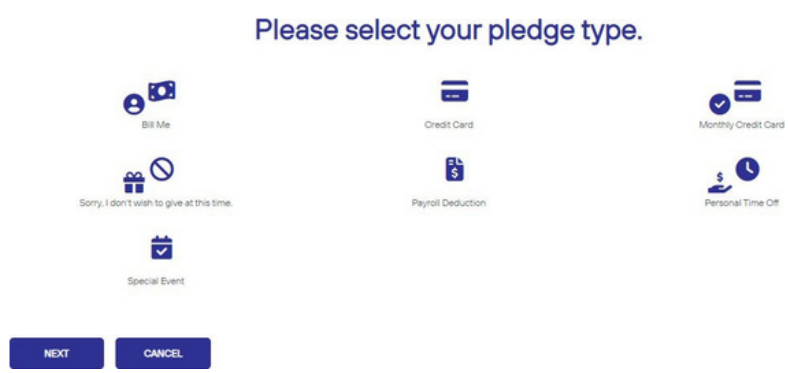
Logs you out of the system, ensuring that employee information is securely locked and accessible only by re-entering your user id and password.

Workplace Donor Menu

- Home – Landing page your workplace
- Pledge – allows you to make a donation to your workplace campaign
- My History – allows you to see your giving history
- My Profile – allows you to update personal information, and set preferences for correspondence
- Logoff – logs you out of the system

Pledge

Here the donor can select how they would like to pledge and how much they would like to donate. Pledging options may vary by workplace.



Special Notes

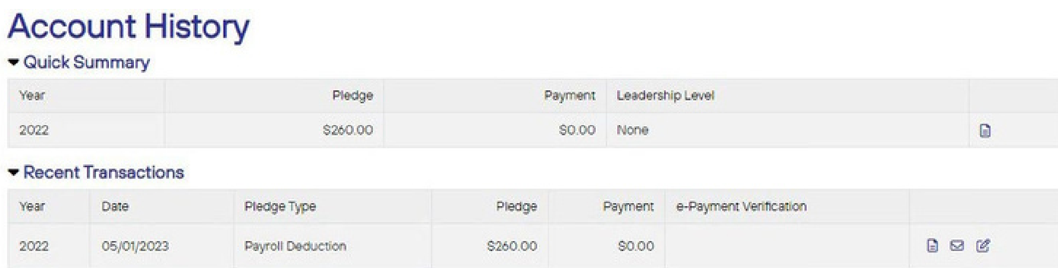
- Those giving by credit card will not enter their credit card on this page. After confirming their pledge details, they will be directed to a secure page that processes their information immediately so that this information is never stored in our database or viewable to staff.
- One time credit card pledges are processed and receipted immediately. Recurring credit card pledges will be charged around the 5th of each month.

***Please refer to the Charities At Work Donor Guide resource for additional details on making a donation through the online system.**

My History

The My history page allows donors to view their past 5 years of giving history with Charities At Work. The page provides a breakdown of all of the donations processed per year and by type.

If a workplace is new to the Charities At Work online giving platform a complete history of giving may not yet be available.



Account History

Quick Summary

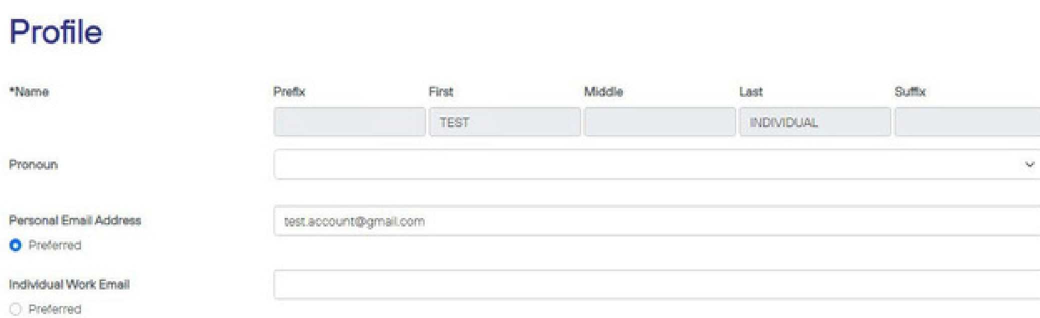
Year	Pledge	Payment	Leadership Level	
2022	$260.00	$0.00	None	

Recent Transactions

Year	Date	Pledge Type	Pledge	Payment	e-Payment Verification	
2022	05/01/2023	Payroll Deduction	$260.00	$0.00		

Profile

The profile page allows donors and administrators to update their recognition name, personal contact information, and contact preferences.



Tax Receipting

Always check to ensure a donation is receiptable under Canada Revenue Agency tax receipting regulations before promising a tax receipt to a donor. One of the most unpleasant tasks a volunteer can face is telling a donor they will not be receiving a tax receipt after all.

Please remember, these are Canada Revenue Agency tax regulations. HealthPartners must follow them to retain our charitable status. There can be no exceptions.

Donations that are receiptable

- Direct cash, cheque, and credit card donations. These are receiptable for the tax year in which they are received.
- Payroll deductions will appear on T4/RL1 slips. Recurring monthly donations will be receipted at the end of the calendar year.

Additional questions or concerns?

Please let us know at info@healthpartners.ca