

## 2021 CONTRIBUTOR CHOICE AGENCY REFERENCE SHEET UNITED WAY OF SOUTHWESTERN PA (UWSWPA)

### TERMS AND DEFINITIONS:

- **Organization Account Number:** This number is used to identify your account in our software system, Andar 360.
- **Vendor ID Number:** This number is used to identify your account in our accounting system. This number used to be called the Agency Financial Ref. ID number.
- **Book or Code Number:** This is the number you should give to your donors to identify your agency when making their pledge.
- **UWSWPA:** Abbreviation for United Way of Southwestern PA.

### REPORTS:

You should run the following reports on a regular basis:

- **Acknowledgment to Agency Report:** This report will give you a list of your donors and their pledges. This report has three sections:
  - Donors who wish to remain anonymous – you will see the donor’s company and the amount of their pledge. You will not see the donor’s name or address. Per the donor’s wishes, UWAC cannot release this information to you.
  - Donors who do not wish to be acknowledged – you will see the donor’s name, address, company, and the amount of their pledge. These donors have requested that you do not acknowledge them. Please honor their wishes.
  - Donors who wish to be acknowledged – these donors are expecting an acknowledgment from you.
- **Payee by Organization Report:** This report will give you the back up for the current deposit. *Please do not try to run this report until the day that the deposit has been made into your account.*
  - You will receive an e-mail 2 to 5 business days before a deposit is made from our Finance Department. This e-mail will come from:  
[agencyrelations@unitedwayswpa.org](mailto:agencyrelations@unitedwayswpa.org)
  - The e-mail will tell you the date of the deposit and the amount to be deposited.
  - The e-mail will have an invoice number. The invoice number will contain the campaign and year. For example:
    - UA20 – this payment is for the 2020 In Area-UWSWPA campaign. (Local)
    - UN20 – this payment is for the 2020 Out of Area campaign. (National)
    - UA21 – this payment is for the 2021 In Area-UWSWPA campaign. (Local)
    - UN21 – this payment is for the 2021 Out of Area campaign. (National)
  - ***This report will be available on the website for three (3) months.*** Please save a copy of this report to your computer for future reference.

## **IMPORTANT PHONE NUMBERS AND E-MAIL ADDRESSES:**

**Agency Relations:** Phone: 412-456-6824 E-mail: [agencyrelations@unitedwayswpa.org](mailto:agencyrelations@unitedwayswpa.org)

- Contact Agency Relations for questions on your Agency Acknowledgment Reports.

**Finance:** Phone: 412-456-6824 E-mail: [payables@unitedwayswpa.org](mailto:payables@unitedwayswpa.org)

- Contact Finance for questions on your Payee by Organization reports and payout deposits.
- **If your agency banking information changes:** You will be required to complete a new Automatic Clearing House (ACH) Authorization Form and submit a voided check from your new account. Call our Customer Service line at 412-456-6824 to request an ACH Form or go to <https://uwsdpa.org/non-profits> scroll down to Contributor Choice and select Automatic Clearing House to print form.

## **UNITED WAY OF SOUTHWESTERN PA WEBSITE (running Acknowledgement to Agency Reports & Contributor Choice Guidelines):**

**The Agency Portal website is:** <https://give.unitedwayswpa.org/Begin.jsp>

- Agency contacts are sent an e-mail with their user ID and password. You will need the user ID and password to log in and access your Acknowledgement to Agency and Payee by Organization Reports.
- If you are locked out of your website account, call Customer Service at 412-456-6824.
- We recommend that you download and review the **Contributor Choice Guidelines**, which are posted on this website.
- **If your contact information changes:** If your contact information should change due to change in personnel or a change in responsibilities, please remember to let us know to assure we keep our records up to date. We communicate primarily by e-mail, you should check your e-mail on a regular basis, and work with your IT staff to ensure that United Way e-mails are always accepted and not deleted or viewed as "spam".
  - Send contact updates to: [agencyrelations@unitedwayswpa.org](mailto:agencyrelations@unitedwayswpa.org)

**The United Way website is:** <https://uwsdpa.org/>

- This is the general information website for the United Way of Southwestern PA. We have a "NON-PROFITS" tab at the bottom of the page with resources that you, as an agency, will find helpful:
- You may also search eligible agencies by agency name and/or code number.
  - Click on NON-PROFITS, scroll down to Contributor Choice under Code Books.

**Please remember to keep your contact information, e-mail address, and banking information up to date to assure you receive communications, payout information, and electronic deposits without delay.**