

How to Set Up Payroll Deductions



Payroll deduction is the most convenient way to contribute to United Way of Calgary and Area. Payroll deduction benefits employees because it allows donations to be spread throughout the year.

Payroll Deduction Set Up:

1. Forward copies of signed pledge cards, where gifts are made by payroll deduction, to your payroll department. Ensure originals are sent to United Way of Calgary and Area (via the Workplace Pledge Envelope).
2. Enter pledges of all employees who authorize payroll deduction into your payroll system.
3. Begin deducting the authorized amount from the employee's payroll on January 1 of the calendar year.
4. If your organization uses an automated payroll service, simply set up an additional deduction code. The United Way deduction code is similar to, and should be handled the same as any other deduction codes you are already using.
5. If your organization does not use an automated payroll service, simply deduct the authorized amount from your employee the way you would other deductions.
6. Typically, payroll pledges run from the beginning of January to the end of December, but exceptions can be made and facilitated if needed. For first-time campaigns, exceptions can be made by contacting United Way with the total pledge amount for each employee so we can enter pledges to cover the year involved.
7. Please be prepared to respond to any pledge or payment inquiries from United Way or its auditors.

Payroll Deduction Remittances:

- It is your responsibility to reconcile the payroll account and remit the total amount of employee deductions for each pay period.
- Payroll remittances can occur weekly, monthly or quarterly; however, monthly is preferred for tracking purposes. United Way's commitment to its member agencies is to remit finances quarterly; therefore, our cash flow is stabilized by those organizations that send their funds to us monthly.
- When regularly forwarding payroll deductions to United Way, please address: Attention Pledge Receivables. Please see the following page for additional details.
- Payments can be made via cheque directly to our office or electronically (please contact payments@calgaryunitedway.org for any information you require if you would like to send payments electronically).

Tax Receipts:

Employees who donate through payroll deduction are entitled to a tax receipt. This can be provided in one of the following ways:

- For most employers, the easiest way to provide a receipt for income tax purposes is to report charitable donations on their employee's T4 slip at year-end. Most organization's payroll systems can handle this very easily.
- If your payroll system cannot report charitable donations on T4s, United Way will issue tax receipts to you for each employee payroll donor. United Way of Calgary and Area requires a written request, by Dec. 15 of that year, indicating your organization would like to receive tax receipts for employee payroll deductions. In order to issue tax receipts, United Way requires a list of donor's names and the amount each donated through payroll deduction. Tax receipts will be issued by the end of February.

Workplace Payroll Information

If your company is going to offer payroll deductions as a form of donation method for employees as a part of your United Way Campaign, please complete and send this form to payments@calgaryunitedway.org.

Organization Name: _____
Company Payroll Administrator: _____
Phone: _____ E-mail: _____
Accounts Payable Department Contact: _____
Phone: _____ Email: _____
Address where payroll department is located: _____

Payroll Payment Detail	
Payment method:	Cheque ☐ Direct Deposit ☐
Payments will be made:	Weekly ☐ Biweekly ☐ Monthly ☐ Quarterly ☐ Annually ☐
Do you require quarterly invoicing?	Yes ☐ No ☐
Payroll deductions dates: Start:	End:

Supporting Documentation

Please ensure that the following details **accompany each payment** to enable us to process correctly:

1. Employee name
2. Employee ID (if applicable)
3. Time period included
4. Amount contributed during that period

	A	B	C	D
1	Company ABC Payroll Contributions for the Period Jan.1/18 - Mar.31/18			
2	Employee ID	First Name	Last Name	Contribution Amount
3	123456	Jack	Smith	\$60.00
4	789101	Jane	Brown	\$150.00
5	339876	Joe	Taylor	\$100.00
6	121314	Mark	MacDonald	\$30.00
7			Total	\$340.00

NOTE: If these details are not provided with **each** payment, it can significantly affect the accuracy of our reporting and ability to steward employee contributions to other charities.

Please submit via email to payments@calgaryunitedway.org in the form of a excel or CSV file, or attach with your payroll payments.

For assistance with payroll contributions please contact:
Natalie Thielen
Pledge Receivables Specialist
Direct: (403) 410-1871 Fax: (403) 355-3135
Email: Natalie.Thielen@calgaryunitedway.org