

## United Way of Greater Philadelphia & Southern New Jersey's Agency Reporting Guide

**Go to:** [www.unitedforimpact.org/reporting/](http://www.unitedforimpact.org/reporting/)

Enter User ID & Password

Click Log In

### **Menu Headings:**

**Donor List** (*always available*) – This is the Acknowledgements to Agencies Report and should be used when generating Thank You Letters to your donors. It lists all the designations to your organization with the amounts designated and the number of donors. Donors should be thanked for their Total Gift amount.

**My Submitted Reports:** Go here to retrieve your submitted or saved reports.

**Payment Detail** (*available under My Submitted Reports after a payout has been generated*) – This is the Payee by Organization Report and should be used to track the donors for which you are currently receiving funds. This report lists all your donors, whose transactions were processed as of the payout cut-off date, including previously paid, currently paying, and not yet paid.

**Maintain Contact Information:** Maintain your agency's employee contacts here. To receive email notifications when an ACH deposit a "Finance Contact" *must* be entered.

To add a Finance Contact:

1. Click on Add Contact.
2. Click Add New Contact.
  - a. Enter at least the Name & Email Address of your contact person.
  - b. Select Finance Contact as the Contact Type
3. Click Add Selected Contact.

**Maintain Banking Information (ACH):** Go here to enter or update your agency's bank information to receive ACH deposits. *Note: Effective July 2022, UWGPSNJ will no longer be issuing manual checks.*

**Additional Resources:** Answers to most of your questions can be found here.

**Payout Policy:** Our Payout Policy and related information regarding admin. fees, tax receipts, collections, etc.

**Payout Schedule:** Estimated dates for ACH Deposit.

**Eligibility Guidelines:** Documentation of UWGPSNJ's Donor Choice Program Policies.