

LIVE UNITED



United Way
of Greater Philadelphia
and Southern New Jersey

United Way of Greater Philadelphia & Southeastern New Jersey's Agency Reporting Website Guide

Go to: 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): Signing up for ACH Deposits will increase the frequency of payments to your agency. Go here to enter or update your agency's information.

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 both ACH Deposit & Paper Check Payouts are included.

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

Frequently Asked Questions: Answers the most common questions regarding the information on this site.