

Coordinator ePledge Reports

Reports are campaign management tools for your use in running an effective campaign.
Please do not publish, distribute, or post reports.

For assistance with reporting, please contact Jess Portanova via email (jessica.portanova@rochester.edu) or at 602-0771.

Please note- any NEW Coordinators for the 2025 campaign will need to reach out to Jess and she will run a report and send it to you. Any existing Coordinators, please see below.

United Way Department Coordinator, you will see this page when you first sign on to ePledge...

UNITED WAY
Greater Rochester
and the Finger Lakes

Chg to Donor Chg Admin
Coordinator Home Reports log off

Welcome Coordinators

Thank you for serving as an e-Pledge Coordinator for the 2025 United Way Campaign!

PLEASE READ:

As a University United Way Department Coordinator, you will always see this page first when signing on to ePledge.

To enter your 2025 pledge, you must "switch" to a donor by clicking the "Chg to Donor" in the menu at the top of the page. You may then "switch" to coordinator by clicking the "Chg to Coord Role" in the menu at top of page.

Throughout the campaign, you may obtain the following reports:

- **EMPLOYEE LISTING:** A listing of all employees assigned to you for this campaign.
- **NO RESPONSE REPORT:** A listing of employees who have not yet responded to the campaign.
- **RESPONSE REPORT:** A listing of employees who have responded to the campaign.
- **SUMMARY1 REPORT:** Reflects total dollars, number of donors and % participation. (NOTE: Current year, 2024 Campaign is to the right and 2023 is to the left on the report.)

DO NOT PUBLISH, DISTRIBUTE, OR POST REPORTS. These reports are campaign management tools for your use in running an effective campaign.

To access a report, click "Reports" at the top of the page. Then click the radio button to select the report you wish to run and click the blue "submit" button. Your report will populate in the "Retrieve my reports" section below. Your report may take a minute or two to become available, just click the blue "Refresh" button after a few minutes.

To enter *your* 2025 pledge, you must switch to the donor screen by clicking "Chg to Donor" in the top right corner (circled in green above). To switch back to the "Welcome Coordinators" page click the "Chg to Coord Role" in the top right corner or "Coordinator Home". (The screen shot above says "Chg Admin" because it is my screen; your screen will say "Chg to Coord Role".)

Throughout the campaign, you will be able to run four reports by clicking “Reports” (circled in yellow above and below). The reports will be automatically tailored to your department. Note, Retired and TAR employees are not included

EMPLOYEE LISTING: A listing of all employees that fall under your coordination and their response status.

NO RESPONSE REPORT: A listing of employees who have not yet responded to the campaign.

RESPONSE REPORT: A listing of employees who have responded to the campaign.

SUMMARY REPORT: Reflects dollars pledged, number of donors and % participation. The 2025 Campaign is to the right and the 2024 Campaign is to the left.

Click the radio button to select the report you wish to run then click the blue "SUBMIT" button. The report will be listed in the "Report Output" section. See example below. It may take a minute or two for the report to become available; click the "REFRESH" button to update. Report is ready when Status = Ready. Click on the report name to save the report to your computer, then open. Note that reports are run in two formats - csv (similar to Excel) and pdf. During the course of the campaign this section could get quite large. See instructions at bottom of screen for deleting reports.

Report Output

To view / download your report, click the link in the "Report Name" column below.

Show Outstanding

Job Number	Job	Report Name	Date	#Pages	Size	Type	Status	Description	
<input type="checkbox"/>	3757144	UR Coordinator No Response Report	University of Rochester - Pledge No Response Report	01/17/2022 06:25:47 PM	4454	11.2 MB	pdf	Ready	
<input type="checkbox"/>	3757144	UR Coordinator No Response Report	University of Rochester - Pledge No Response Report	01/17/2022 06:25:47 PM	0	7.1 MB	csv	Ready	

Reports will remain in the table above unless deleted. If you wish to delete a report, check the box to the left of the report you wish to delete and click the "delete" button.

Suggested Reporting Timeline

March 19th

- Run the "Employee Listing" report to get a list of all employees in your department for use in campaign communications.

March 19th to May 16th

- Run the "No Response" report to get a list of employees who HAVE NOT yet responded to the campaign for use in follow-up communications.
- Run the "Summary" report to get department wide data on 2025 vs 2024 dollars raised and % participation.