

Charity Choice

Concept

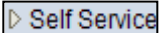


The Charity Choice campaign is a time when participating employees can elect to make contributions to charities through a check or payroll deduction. Charity Choice selections are made through the HCM system.


At the end of each contribution year, participating employees can add or copy contributions to the upcoming year during the campaign period. In order to continue making contributions, employees must enter the HCM system and indicate the charities to which they will donate during the upcoming year.

Participants can view their Charity Choice contributions throughout the year in HCM, but changes can only be made during the specified campaign period.

Procedure







Begin by logging in to HCM at *case.edu/hcm* with your CWRU Network ID and password.

Step	Action
1.	Click the Self Service link. 
2.	Click the Payroll and Compensation link. 
3.	Click the Charity Choice link. 



Nicole Dyme

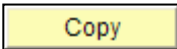
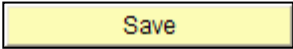

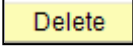
Contributions for 2009 To donate to the same Agency (same or different amount) as you did in 2008 click the copy button located in the "Contributions for 2008" section.

List of Contributions					
Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount
Community Shares	Community Share - General	70.00	5	350.00	
Earth Share of Ohio	Buckeye Trail Association	20.00	5	100.00	
Independent 501(c)(3)	MorrisonDance	60.00	5	300.00	
United Way	Boy Scouts of America, Greater Cleveland Council	40.00	5	200.00	
United Way	Cleveland Hearing and Speech Center	40.00	5	200.00	
United Way	Magnolia Club House	40.00	5	200.00	

Information Technology Services Reference Guide
Charity Choice


Step	Action
4.	The Charity Choice Campaign screen appears. Your previous year's contributions are listed at the top of the screen. There is a blank space below it for the contributions you wish to make for the coming year.

The Charity Choice campaign opens on September 16, 2011 for contributions beginning in 2012.

Step	Action
5.	To copy a contribution from this year to the upcoming year, click the Copy button. 
6.	The contribution appears in the upcoming year's contribution list. Click the Save button. 
7.	A confirmation screen appears. Click the OK button. 
8.	To remove a contribution from the upcoming year's list, click its Delete button. 

You may delete your contributions at any time during the Charity Choice campaign period.

2011: September 16 to December 16.

Step	Action
9.	To update or change a contribution that was copied, click the Edit button. 

Change Contribution
Charity Choice

Nicole Dyme

*Federation Name: Earth Share of Ohio

Member Agency (Optional): E050 Buckeye Trail Association

Donation Type

Payroll Deduction Check

* Monthly Payroll Deduction Amount: 20.00 * Number of Months: 5

Maximum Annual Deduction Amount: 100.00

I wish to be an anonymous donor
 I wish to volunteer my services to the above Agency

* Required Field

Save


[Return to Charity Choice](#)








Step	Action
10.	The Change Contribution screen appears. If applicable, the Member Agency field can be updated.
11.	The Donation Type of Payroll Deduction or Check can be changed.
12.	If Payroll Deduction is chosen, the Monthly Payroll Deduction Amount and Number of Months can be changed.
13.	The Maximum Annual Deduction Amount updates to reflect any changes made to the contribution amount.
14.	If paying by check, enter the appropriate amount into the Amount Paid by Check field. You will be given the address to mail your check when the Save button is clicked. * Amount Paid by Check:
15.	Click the I wish to be an anonymous donor checkbox option to donate anonymously to this charity. <input type="checkbox"/> I wish to be an anonymous donor
16.	Click the I wish to volunteer my services to the above Agency checkbox option to make your interest in volunteering known. <input type="checkbox"/> I wish to volunteer my services to the above Agency
17.	Click the Save button. Save



You may edit your contributions at any time during the Charity Choice campaign period.

2011: September 16 to December 16

Information Technology Services Reference Guide
Charity Choice

Step	Action
18.	A confirmation screen appears. Click the OK button. 


List of Contributions					
Federation Name	Member Agency	Monthly Deduction	Months	Maximum Annual	Check Amount
Community Shares	Community Share - General	70.00	5	350.00	
Earth Share of Ohio	Buckeye Trail Association	20.00	5	100.00	
Independent 501(c)(3)	MorrisonDance	60.00	5	300.00	
United Way	Boy Scouts of America, Greater Cleveland Council	40.00	5	200.00	
United Way	Cleveland Hearing and Speech Center	40.00	5	200.00	
United Way	Magnolia Club House	40.00	5	200.00	
2009 Calendar Year Total		270.00		1350.00	
					

Step	Action
19.	To copy another contribution to the upcoming year, click the appropriate Copy button and repeat the preceding steps. You may donate to as many organizations as you like. 
20.	To enter a new contribution to the upcoming year's list, click the Add New Contribution button. 

Add Contribution

Charity Choice

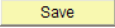
Nicole Dyme

*Federation Name: 

* Donation Type

Payroll Deduction Check

* Required Field



[Return to Charity Choice](#)

Step	Action
21.	The Add Contribution screen appears. Click the Federation Name list.

Information Technology Services Reference Guide
Charity Choice

Step	Action
22.	<p>Select the appropriate charity from the list.</p> <p>If the charity to which you wish to donate is not listed, select the Independent 501(c)(3) list item.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Independent 501(c)(3)</div>
23.	<p>If Community Shares, Earth Shares of Ohio, or United Way was chosen in the Federation Name field, the Member Agency (Optional) field appears. Use this field to designate a specific agency to receive your contribution, if you so desire.</p> <p>Click the Look up Member Agency button to select a member agency from the search results.</p>

If a member agency is not chosen, the contribution will be sent directly to the selected Federation.

Step	Action
24.	<p>Select the appropriate Donation Type: Payroll Deduction or Check.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;"> <input type="radio"/> Payroll Deduction <input type="radio"/> Check </div>
25.	<p>If Check was selected, enter an amount into the Amount Paid by Check field.</p> <p>If United Way, Community Shares or Earth Shares of Ohio was chosen as the Federation, you will be given the address to mail the check when the Save button is clicked.</p>
26.	<p>If Payroll Deduction was chosen, enter the desired dollar amount into the Monthly Payroll Deduction Amount field.</p>
27.	<p>Press [Tab] on your keyboard.</p>
28.	<p>The Number of Months field defaults to 12. This amount can be changed if desired.</p>
29.	<p>The Maximum Annual Deduction Amount field updates according to the contents of the Monthly Payroll Deduction Amount and Number of Months fields.</p>
30.	<p>Click the I wish to be an anonymous donor checkbox option if you would prefer to contribute anonymously.</p>
31.	<p>Click the I wish to volunteer my services to the above Agency checkbox option to indicate your desire to volunteer.</p>

Information Technology Services Reference Guide

Charity Choice

Add Contribution
Charity Choice

Nicole Dyme

*Federation Name:

* Donation Type
 Payroll Deduction Check

* Monthly Payroll Deduction Amount: * Number of Months:

Maximum Annual Deduction Amount: 120.00

I wish to be an anonymous donor
 I wish to volunteer my services to the above Agency

* Independent Agency

Agency Name:

Address 1:

City: State: Postal:

* Required Field

[Return to Charity Choice](#)

Step	Action
32.	<p>If Independent 501(c)(3) was selected in the Federation Name field, the Independent Agency address box appears.</p> <p>Enter the appropriate information into the Agency Name, Address 1, City, State, and Postal (Zip code) fields.</p>
33.	<p>Click the Save button.</p> <p><input type="button" value="Save"/></p>

You may edit your contributions at any time during the Charity Choice campaign period.

2011: September 16 to December 16

Step	Action
34.	<p>A confirmation screen appears.</p> <p>Click the OK button.</p> <p><input type="button" value="OK"/></p>
35.	<p>To add another new contribution to the upcoming year, click the Add New Contribution field and repeat the preceding steps. You may donate to as many organizations as you wish.</p> <p><input type="button" value="Add New Contribution"/></p>
36.	<p>Your contributions for the upcoming year are displayed in the contribution list.</p>

Information Technology Services Reference Guide
Charity Choice

You may continue to add, copy, edit, and delete contributions for the upcoming year throughout the Charity Choice campaign period.

2011: September 16 to December 16

Step	Action
37.	This completes the process of entering contributions for the Charity Choice campaign. End of Procedure.