

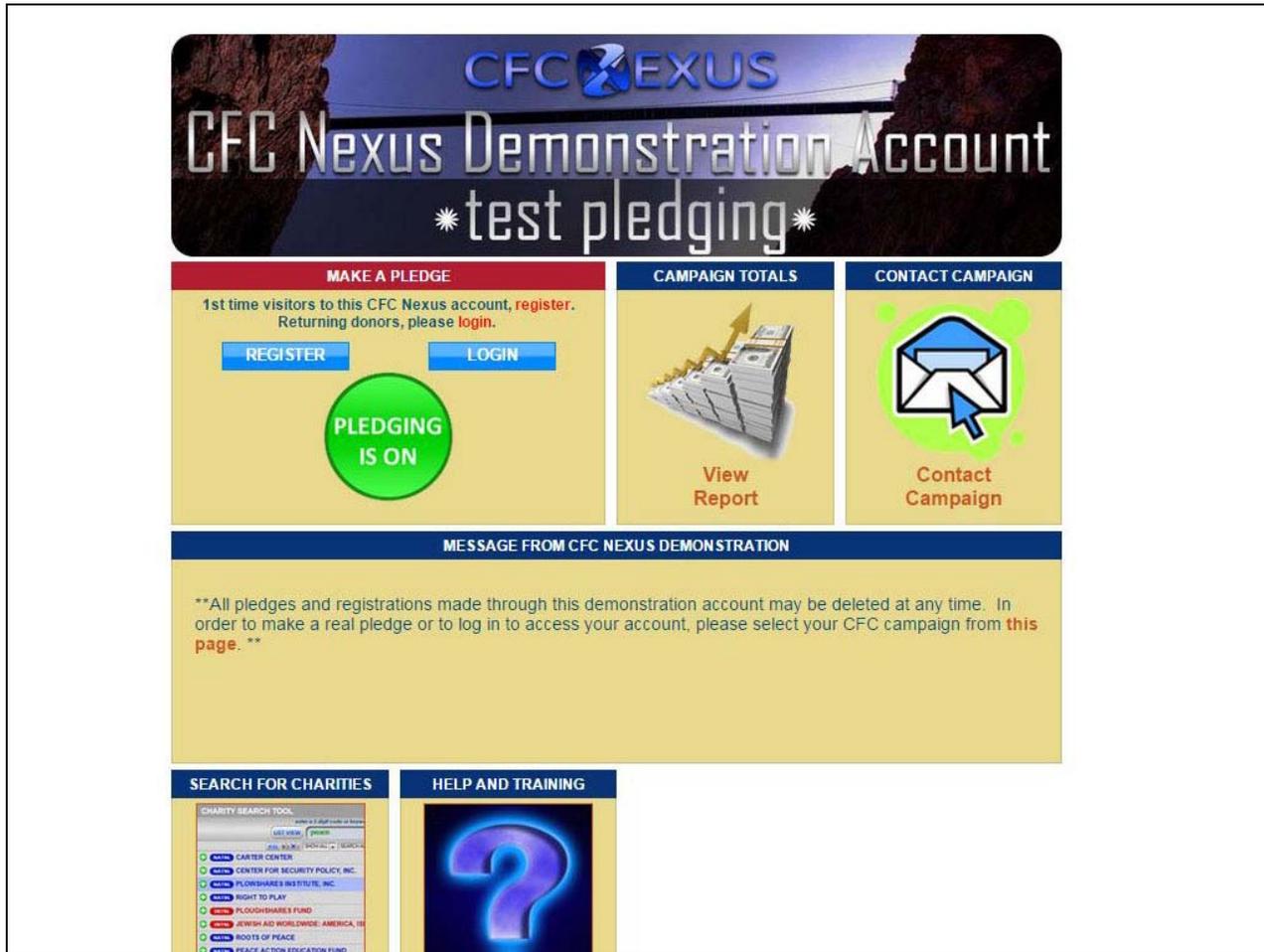
Slide 1



Slide notes

In this video, we will examine the work flow for users designated as "Payroll Coordinators" where their Federal Agency is set to the "donor print" method. The "donor print" method is setting whereby the donor is prompted to print, sign, and physically submit their online pledge.

Slide 2



Slide notes

In this example, we will login as a payroll coordinator in the demonstration account. In order to login and process real pledges, however, make sure you are registered and logging in at your specific CFC account.

Slide 3

The screenshot displays the CFC Nexus Demonstration Account website. At the top, the logo 'CFC NEXUS' is shown above the text 'CFC Nexus Demonstration Account' and 'test pledging'. Below this, there are three main sections: 'MAKE A PLEDGE', 'CAMPAIGN TOTALS', and 'CONTACT CAMPAIGN'. The 'MAKE A PLEDGE' section includes instructions for new and returning visitors, 'REGISTER' and 'LOGIN' buttons, and a green circular badge that says 'PLEDGING IS ON'. The 'CAMPAIGN TOTALS' section features an icon of a stack of money with an upward arrow and a 'View Report' button. The 'CONTACT CAMPAIGN' section has an envelope icon and a 'Contact Campaign' button. A central message box states: '**All pledges and registrations made through this demonstration account may be deleted at any time. In order to make a real pledge or to log in to access your account, please select your CFC campaign from this page.**'. At the bottom, there are two sections: 'SEARCH FOR CHARITIES' showing a list of charities like 'CARTER CENTER' and 'ROOTS OF PEACE', and 'HELP AND TRAINING' with a large question mark icon.

Slide notes

In the donor print method, the “Payroll Coordinator” role is responsible for verifying that online pledge copies have been received. They also deliver those pledge copies to the payroll centers.

Slide 4

The screenshot displays the CFC Nexus Demonstration Account website. At the top, the logo 'CFC NEXUS' is shown above the text 'CFC Nexus Demonstration Account' and 'test pledging'. Below this, there are three main sections: 'MAKE A PLEDGE', 'CAMPAIGN TOTALS', and 'CONTACT CAMPAIGN'. The 'MAKE A PLEDGE' section includes instructions for new and returning donors, 'REGISTER' and 'LOGIN' buttons, and a green circular badge that says 'PLEDGING IS ON'. The 'CAMPAIGN TOTALS' section features an icon of a stack of money and a 'View Report' button. The 'CONTACT CAMPAIGN' section has an envelope icon and a 'Contact Campaign' button. A central message box states: '**All pledges and registrations made through this demonstration account may be deleted at any time. In order to make a real pledge or to log in to access your account, please select your CFC campaign from this page.**' At the bottom, there are two sections: 'SEARCH FOR CHARITIES' showing a list of charities like 'CARTER CENTER' and 'ROOTS OF PEACE', and 'HELP AND TRAINING' with a large question mark icon.

Slide notes

In order to become a “Payroll Coordinator”, you must have first registered at your CFC’s account. Your CFC administrator will then upgrade your registration to one with “Payroll Coordinator” privileges.

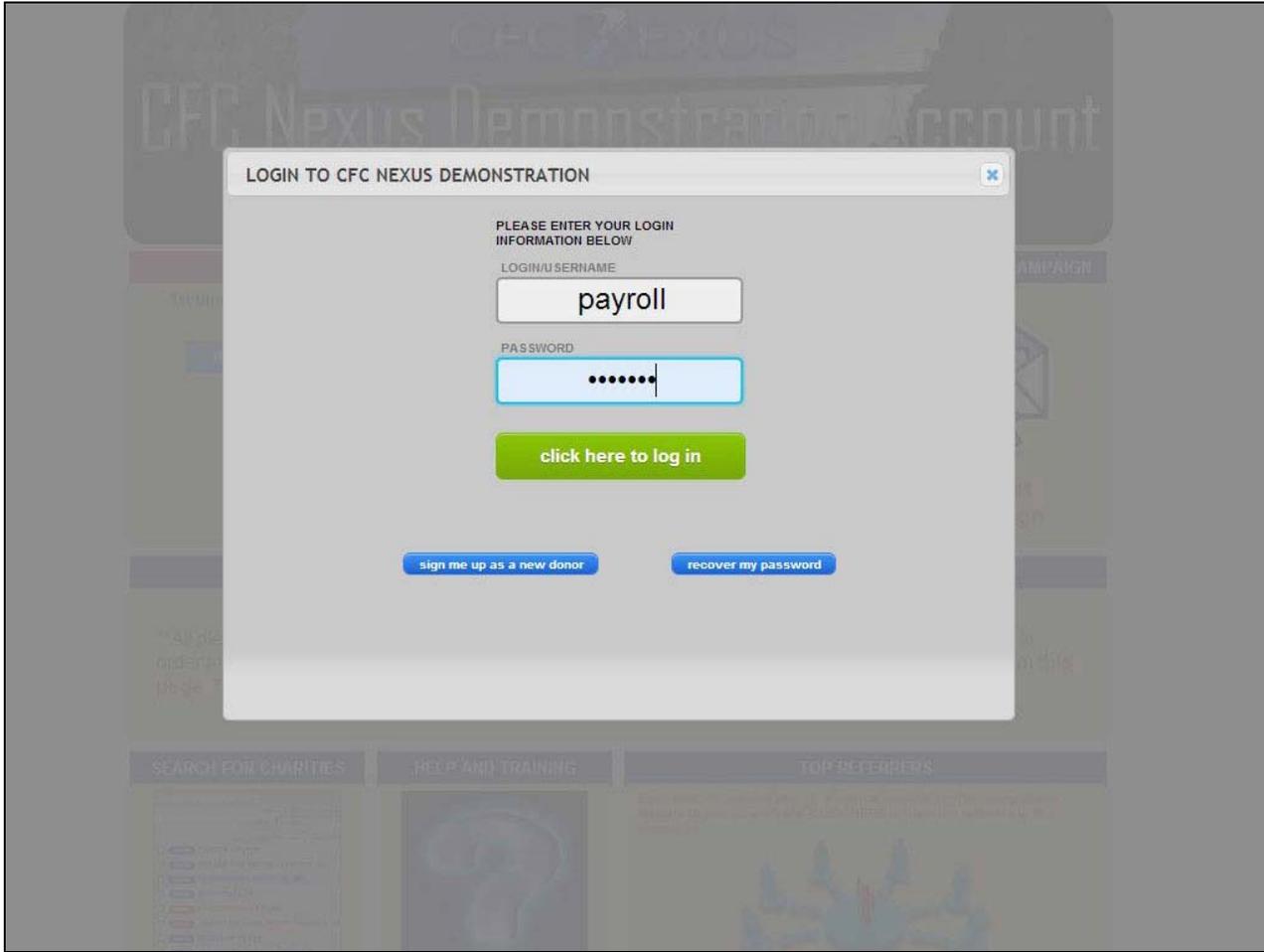
Slide 5

The screenshot displays the CFC Nexus Demonstration Account website. At the top, the logo 'CFC NEXUS' is shown above the text 'CFC Nexus Demonstration Account' and 'test pledging'. Below this, there are three main navigation buttons: 'MAKE A PLEDGE', 'CAMPAIGN TOTALS', and 'CONTACT CAMPAIGN'. The 'MAKE A PLEDGE' section includes instructions for new and returning users, 'REGISTER' and 'LOGIN' buttons, and a green circular badge that says 'PLEDGING IS ON'. The 'CAMPAIGN TOTALS' section features an icon of a stack of money and a 'View Report' button. The 'CONTACT CAMPAIGN' section has an envelope icon and a 'Contact Campaign' button. A central message box states: '**All pledges and registrations made through this demonstration account may be deleted at any time. In order to make a real pledge or to log in to access your account, please select your CFC campaign from this page. **'. At the bottom, there are two sections: 'SEARCH FOR CHARITIES' with a list of charity names and 'HELP AND TRAINING' with a large question mark icon.

Slide notes

Once your CFC administrator has upgraded you to a “Payroll Coordinator”, you will log in to your CFC’s account.

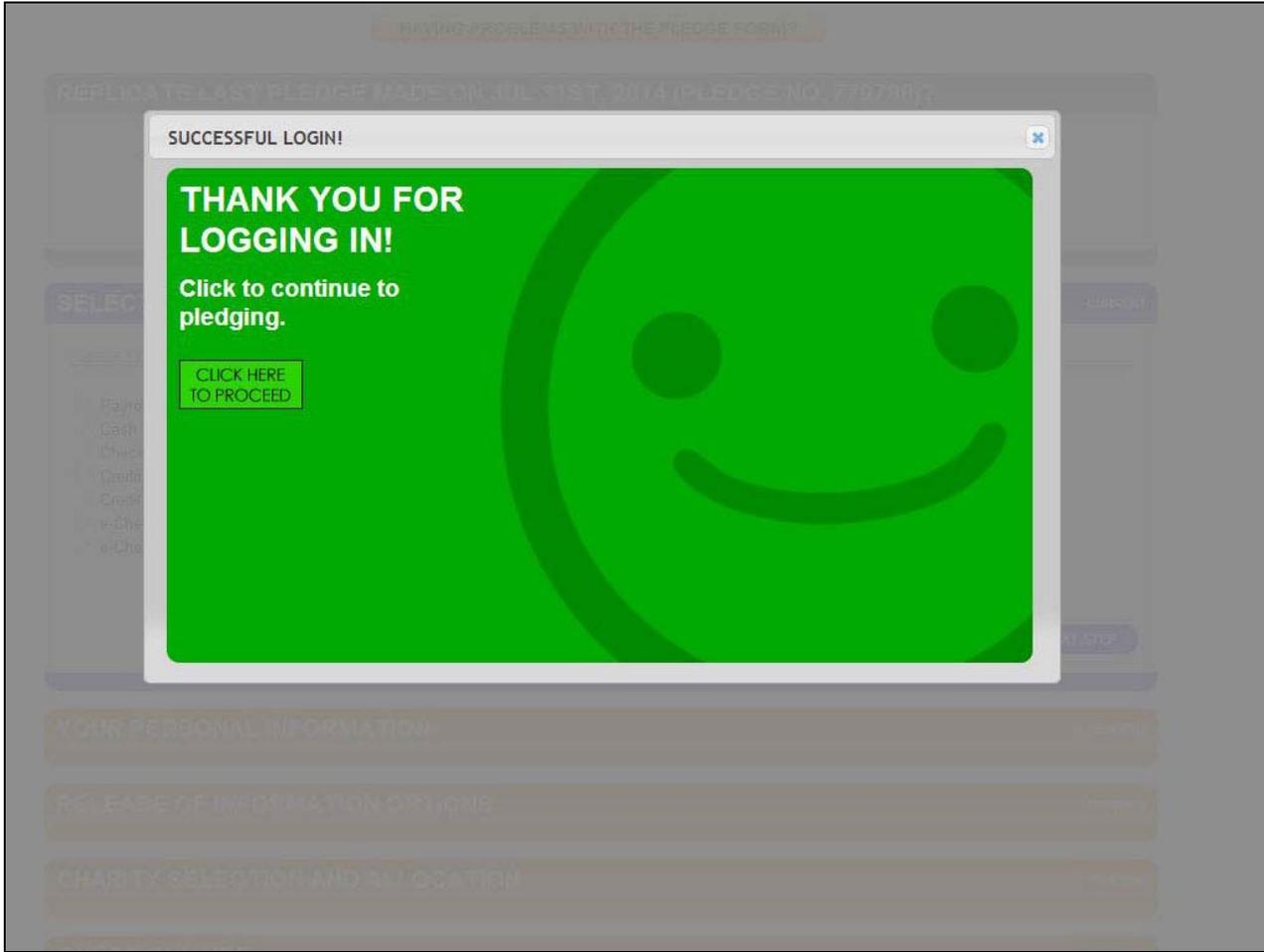
Slide 6



Slide notes

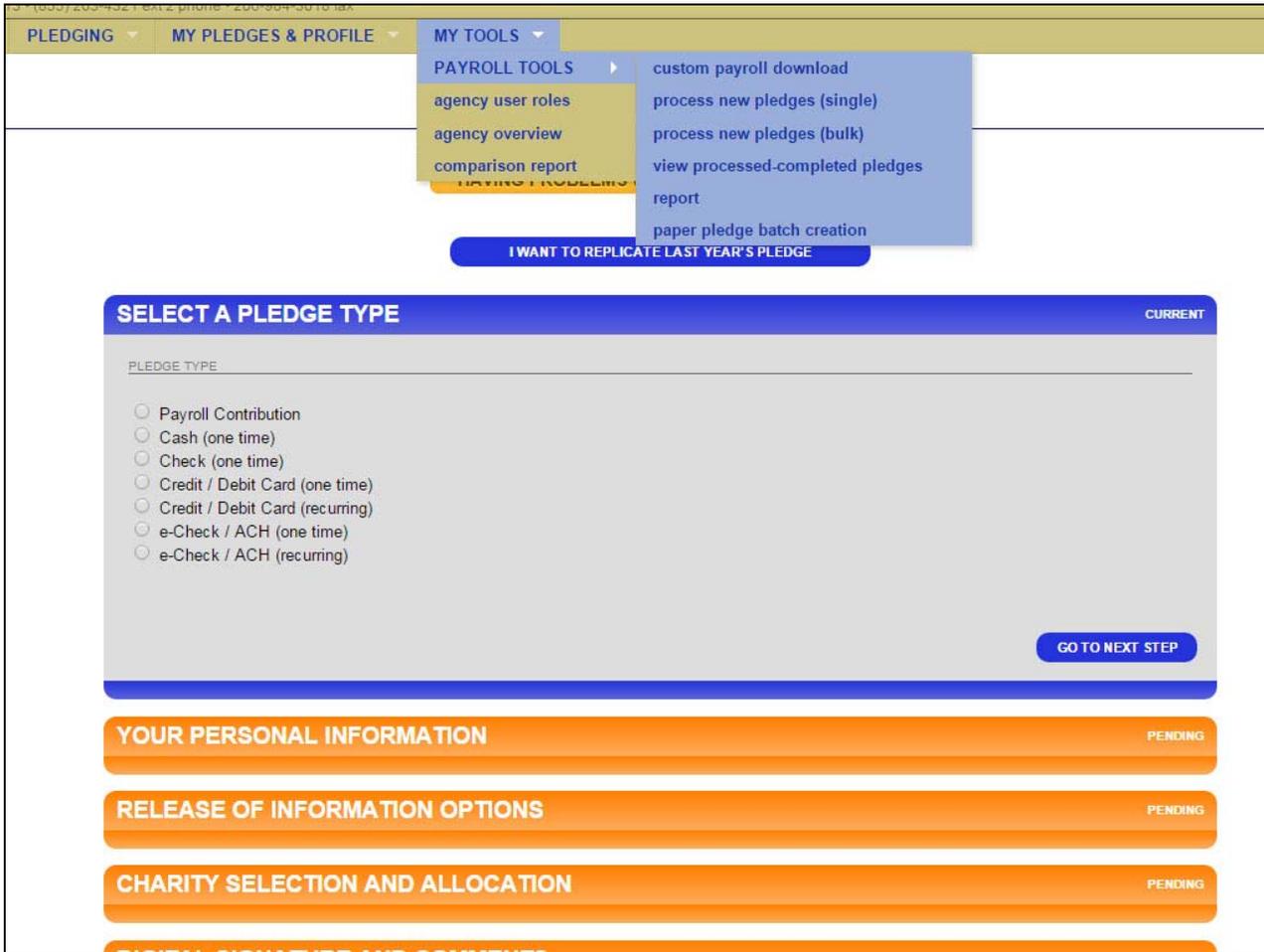
Enter your username and password and click "GO".

Slide 7



Slide notes

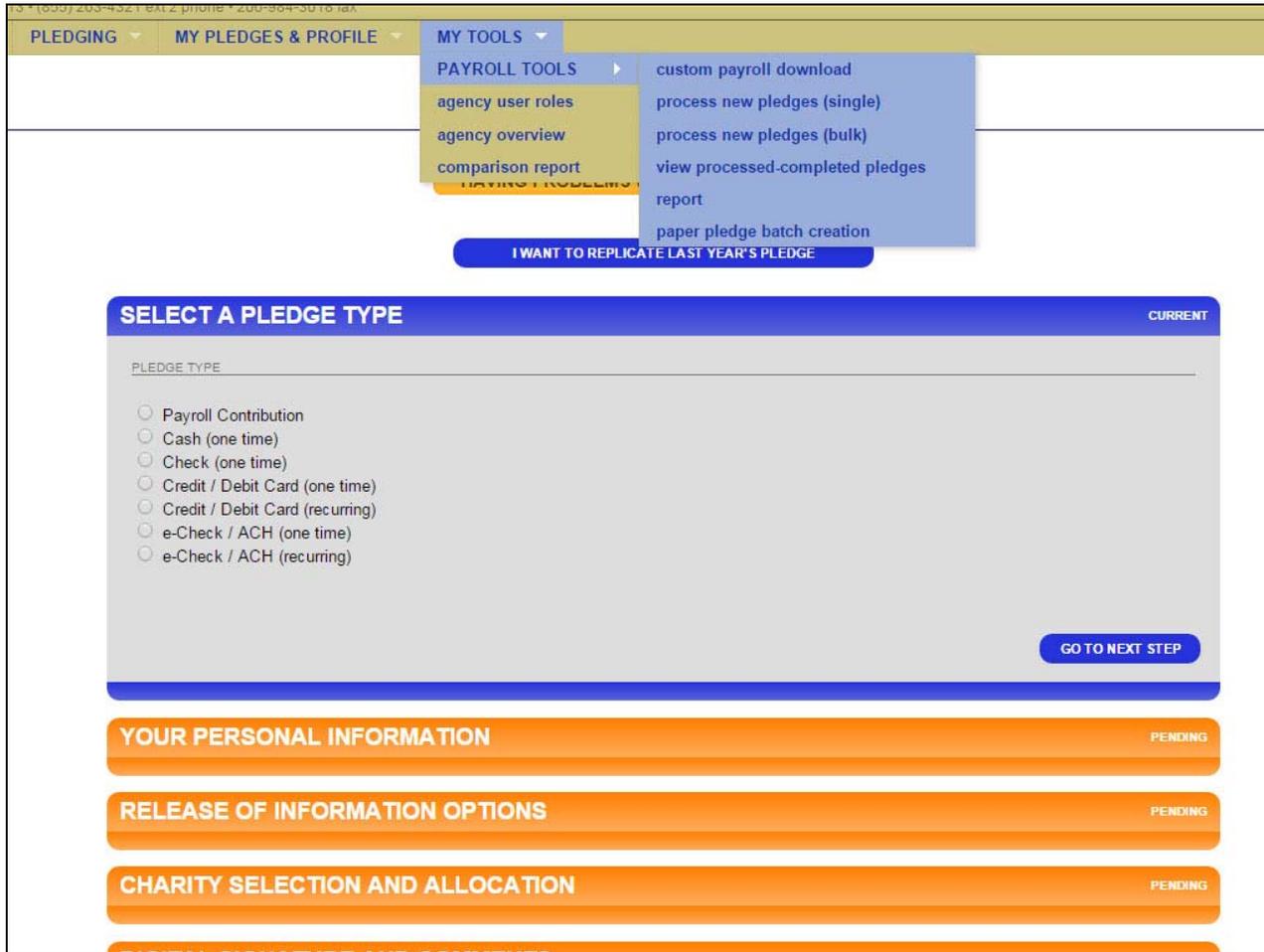
Slide 8



Slide notes

As a Payroll Coordinator, you will see a top menu item called “PAYROLL.”

Slide 9



Slide notes

There are two methods available for processing donor printed pledges. First, we will look at the “single” method.

Slide 10

PAYROLL - PROCESS NEW INCOMING PLEDGES

Expand the groups below to find and process pledges. Type in the search field to find a specific pledge.

search by keyword

- + 2015 Sample Federal Agency Group 1 (1 unprocessed pledges)
- + 2015 Sample Federal Agency Group 2 (1 unprocessed pledges)
- + 2015 Sample Federal Agency Group 3 (1 unprocessed pledges)

Slide notes

On the left column are Federal agency locations that have unprocessed pledges. You will only see Federal agency locations for which you have been given access.

Slide 11

Expand the groups below to find and process pledges. Type in the search field to find a specific pledge.

	2015 Sample Federal Agency Group 1 (1 unprocessed pledges)	
	2015 Sample Federal Agency Group 2 (1 unprocessed pledges)	
	2015 Sample Federal Agency Group 3 (1 unprocessed pledges)	
	Sample Federal Agency S (donor print method) (1 unprocessed pledges)	8854 Charity Road Seasalt, CA 90215

Slide notes

Click the green circle to expand the data.

Slide 12

PAYROLL - PROCESS NEW INCOMING PLEDGES

Expand the groups below to find and process pledges. Type in the search field to find a specific pledge.

search by keyword [reset](#)

- 2015 Sample Federal Agency Group 3 (1 unprocessed pledges)
- Sample Federal Agency S (donor print method) (1 unprocessed pledges) 8854 Charity Road
Seasalt, CA 90215
- 1134624 Weixel, Joel Payroll Contribution \$ 884.00 Fri Aug 14 2015

MAKE SURE YOU HAVE THE "SIGNED" PRINTED PLEDGE FORM FROM THIS DONOR BEFORE MARKING THIS PLEDGE AS PROCESSED BY CLICKING THE ORANGE BAR BELOW

CLICK HERE IF YOU HAVE RECEIVED THIS PLEDGE



CFC CAMPAIGN NO **9999** CITY/STATE CODE **09 9999** ATTENTION PAYROLL OFFICES:
Use this number only to identify the local campaign.

PLEDGE NUMBER: 1134624 PLEDGE DATE: AUG 14, 2015

LAST NAME, FIRST NAME	CIVILIAN	FEDERAL AGENCY / OFFICE	SSN/Employee ID
Weixel, Joel	CIVILIAN	Sample Federal Agency S (donor print method) (Seasalt)	
DONOR EMAIL			
joeloweixel@gmail.com			
WORK ADDRESS & ZIP CODE			WORK PHONE NO.
8854 Charity Road Seasalt 90215			
CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.			
ALLOTMENT SOURCE	AMOUNT	INTERVAL	TOTAL GIFT
CIVILIAN	\$34.00	26 pay periods	\$884.00
LEADERSHIP GIVING			
I elect NOT to receive an incentive gift as recognition for any contribution.			
RELEASE OF INFORMATION		PAYROLL DEDUCTION AUTHORIZATION	
I would like to remain anonymous, please do not release my information.		I hereby authorize any agency of the United States Government by which I may be employed during 2015 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2015 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.	

Slide notes

Slide 13

PAYROLL - PROCESS NEW INCOMING PLEDGES

Expand the groups below to find and process pledges. Type in the search field to find a specific pledge.

search by keyword reset

- 2015 Sample Federal Agency Group 3 (1 unprocessed pledges)
- Sample Federal Agency S (donor print method) (1 unprocessed pledges) 8854 Charity Road
Seasalt, CA 90215
- 1134624 Weixel, Joel Payroll Contribution \$ 884.00 Fri Aug 14 2015

**MAKE SURE YOU HAVE THE "SIGNED" PRINTED PLEDGE FORM
FROM THIS DONOR BEFORE MARKING THIS PLEDGE AS PROCESSED
BY CLICKING THE ORANGE BAR BELOW**

CLICK HERE IF YOU HAVE RECEIVED THIS PLEDGE

	CFC CAMPAIGN NO 9999	CITY/STATE CODE 09 9999	ATTENTION PAYROLL OFFICES: <small>Use this number only to identify the local campaign.</small>
--	--------------------------------	-----------------------------------	---

PLEDGE NUMBER: 1134624 PLEDGE DATE: AUG 14, 2015

LAST NAME, FIRST NAME	CIV/MIL	FEDERAL AGENCY / OFFICE	SSN/Employee ID
Weixel, Joel	CIVILIAN	Sample Federal Agency S (donor print method) (Seasalt)	
DONOR EMAIL			
joeloweixel@gmail.com			
WORK ADDRESS & ZIP CODE			WORK PHONE NO.
8854 Charity Road Seasalt 90215			
<small>CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.</small>			
ALLOTMENT SOURCE	AMOUNT	INTERVAL	TOTAL GIFT
CIVILIAN	\$34.00	26 pay periods	\$884.00
LEADERSHIP GIVING			
I elect NOT to receive an incentive gift as recognition for any contribution.			
RELEASE OF INFORMATION		PAYROLL DEDUCTION AUTHORIZATION	
I would like to remain anonymous, please do not release my information.		I hereby authorize any agency of the United States Government by which I may be employed during 2016 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2016 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.	

Slide notes

If you have received a paper copy of this pledge and it is fully completed with a wet signature, click the large orange button. This simply marks the pledge as processed and removes it from the list on the left.

Slide 14

PAYROLL - PROCESS NEW INCOMING PLEDGES

Expand the groups below to find and process pledges. Type in the search field to find a specific pledge.

search by keyword

-  2015 Sample Federal Agency Group 1 (1 unprocessed pledges)
-  2015 Sample Federal Agency Group 2 (1 unprocessed pledges)

Slide notes

That pledge is removed and you could continue with the others.

Slide 15

STRATION
is, MN 55413 • (355) 263-4321 ext.2 phone • 206-984-3018 fax

XUS PLEDGING MY PLEDGES & PROFILE MY TOOLS

PAYROLL TOOLS
agency user roles
agency overview
comparison report

custom payroll download
process new pledges (single)
process new pledges (bulk)
view processed-completed pledges report
paper pledge batch creation

Expand the groups below to find and process pledge.

search by keyword

- 2015 Sample Federal Agency Group 1 (1 unprocessed pledges)
- 2015 Sample Federal Agency Group 2 (1 unprocessed pledges)

Slide notes

We will now look at the 2nd method for processing which is by bulk.

Slide 16

PAYROLL - BULK UNPROCESSED PLEDGES

BULK PROCESSING ONLY APPLIES TO *PAYROLL DEDUCTION* PLEDGES
Cash & Check pledges must still be processed using the single pledge processing tool.

(click to expand headers below)

2015 SAMPLE FEDERAL AGENCY GROUP 1	Sample Federal Agency L	Unit 10	123 Maple Street	Donation, MN 55406
2015 SAMPLE FEDERAL AGENCY GROUP 2	Sample Federal Agency P	316.4	012 Apple Lane	Providence, WA 98003
2015 SAMPLE FEDERAL AGENCY GROUP 2	Sample Federal Agency Q			
2015 SAMPLE FEDERAL AGENCY GROUP 3	Sample Federal Agency S (donor print method)		8654 Charity Road	Seasalt, CA 90215

Slide notes

Select the Federal Agency location.

Slide 17

2015 SAMPLE FEDERAL AGENCY GROUP 2 Sample Federal Agency P 316.4 012 Apple Lane Providence, RI 02803	(1) unproc
2015 SAMPLE FEDERAL AGENCY GROUP 2 Sample Federal Agency Q	(1) unproc
2015 SAMPLE FEDERAL AGENCY GROUP 3 Sample Federal Agency S (donor print method) 8654 Charity Road Seaside, CA 90215	(2) unproc

THIS AGENCY IS SET TO THE "DONOR PRINT METHOD" WHICH REQUIRES A WET SIGNATURE
ALL DONORS FOR THIS AGENCY MUST PRINT/SIGN/DELIVER THEIR PLEDGE FORM TO YOU
DO NOT CLICK THIS BUTTON UNTIL YOU HAVE **ALL** THE PLEDGES LISTED BELOW SIGNED AND IN HAND

MARK ALL PLEDGES DISPLAYED BELOW (WITHIN THIS AGENCY) AS PROCESSED



CFC CAMPAIGN NO
9999

CITY/STATE CODE
09 9999

ATTENTION PAYROLL OFFICES:
Use this number only to identify the local campaign.

PLEDGE NUMBER: 1134629 PLEDGE DATE: AUG 17 2016

LAST NAME, FIRST NAME	CIV/MIL	FEDERAL AGENCY / OFFICE	SSN/Employee ID
Waive Local	CIVILIAN	Sample Federal Agency S (donor print method) (Seaside)	
DONOR EMAIL			
joe.lowe@kel@gmail.com			
WORK ADDRESS & ZIP CODE			WORK PHONE NO.
3854 Charity Road Seaside 90215			
CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.			
ALLOTMENT SOURCE	AMOUNT	INTERVAL	
CIVILIAN	345.00	26 pay periods	
LEADERSHIP GIVING			
I elect <input type="checkbox"/> TO receive an incentive gift as recognition for any contribution.			
RELEASE OF INFORMATION		PAYROLL DEDUCTION AUTHORIZATION	
If you would like to remain anonymous, please do not release my information.		I hereby authorize any agency of the United States Government by which I may be employed during 2016 to deduct the amounts shown above from my pay each pay period during the calendar year 2016 starting with the first pay period that begins in ending with the last pay period that begins in December and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.	
		 _____ SIGNATURE	AUG 17 2016 _____ DATE
DISCLOSURES			

Slide notes

When you click on the Federal Agency location, all unprocessed pledges will be displayed.

Slide 18

- 2015 SAMPLE FEDERAL AGENCY GROUP 1 [Sample Federal Agency L](#) Unit 110 123 Maple Street Donaton, MN 55406
- 2015 SAMPLE FEDERAL AGENCY GROUP 2 [Sample Federal Agency P](#) 318.4 012 Apple Lane Provide, WA 98003
- 2015 SAMPLE FEDERAL AGENCY GROUP 2 [Sample Federal Agency Q](#)
- 2015 SAMPLE FEDERAL AGENCY GROUP 3 [Sample Federal Agency S \(donor print method\)](#) 3254 Charity Road Seassalt, CA 90215

**THIS AGENCY IS SET TO THE "DONOR PRINT METHOD" WHICH REQUIRES A WET SIGNATURE
ALL DONORS FOR THIS AGENCY MUST PRINT/SIGN/DELIVER THEIR PLEDGE FORM TO YOU
DO NOT CLICK THIS BUTTON UNTIL YOU HAVE **ALL** THE PLEDGES LISTED BELOW SIGNED AND IN HAND**

MARK ALL PLEDGES DISPLAYED BELOW (WITHIN THIS AGENCY) AS PROCESSED



CFC CAMPAIGN NO
9999

CITY/STATE CODE
09 9999

ATTENTION PAYROLL OFFICES:
Use this number only to identify the local campaign.

PLEDGE NUMBER: 1134629

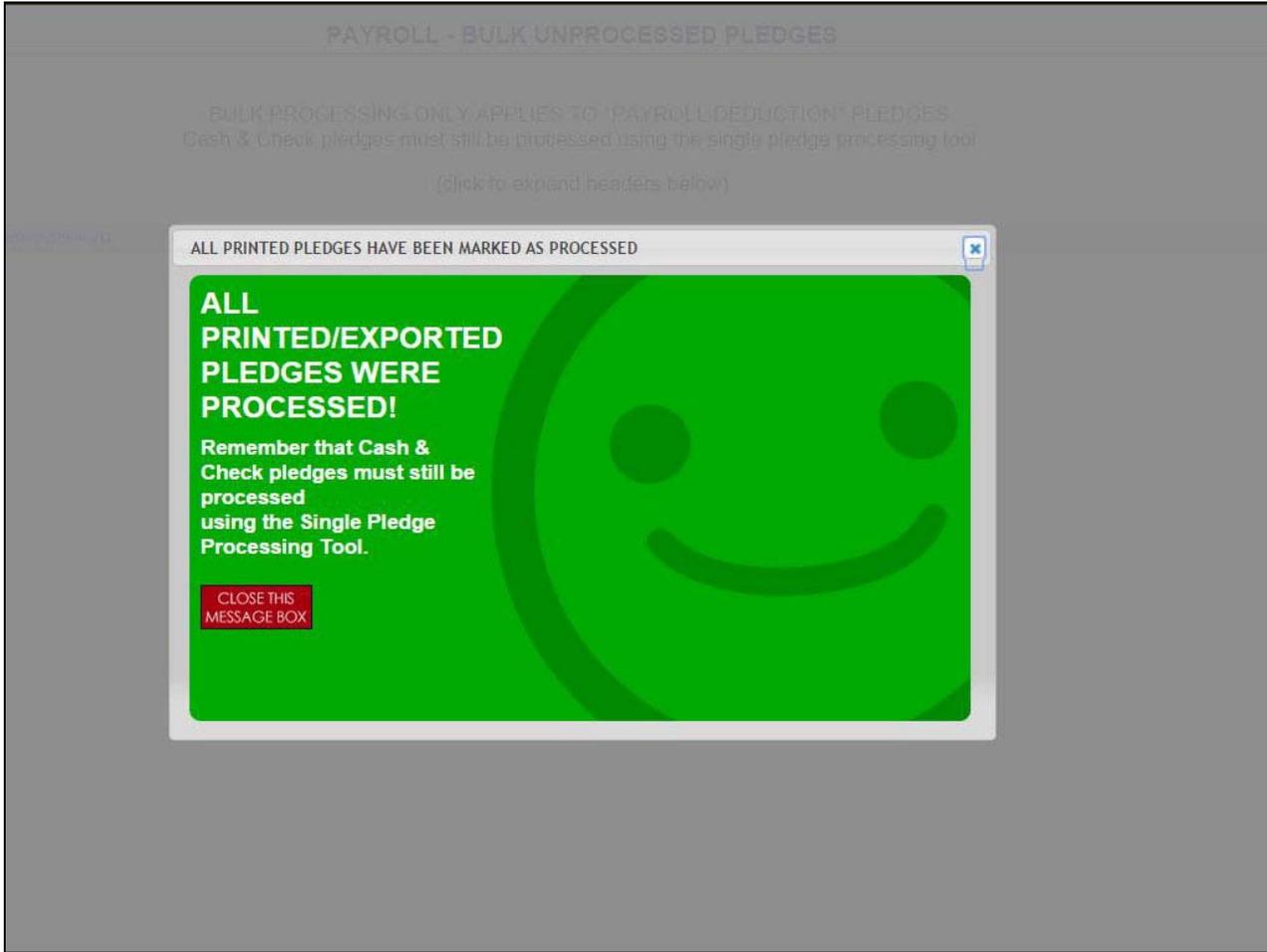
PLEDGE D

LAST NAME	FIRST NAME	CIVILIAN	FEDERAL AGENCY / OFFICE	SSN/Employee ID
Weikel, Joel		CIVILIAN	Sample Federal Agency S (donor print method) (Seassalt)	
DONOR EMAIL				
joeloweikel@gmail.com				
WORK ADDRESS & ZIP CODE			WORK PHONE NO.	
8834 Charity Road Seassalt 90215				
<small>CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution. Write in the total of your annual contribution in the space provided.</small>				
ALLOTMENT SOURCE	AMOUNT			INTERVAL
CIVILIAN	\$45.00			26 pay periods
LEADERSHIP GIVING				
<input type="checkbox"/> elect NOT to receive an incentive gift as recognition for any contribution				
RELEASE OF INFORMATION		PAYROLL DEDUCTION AUTHORIZATION		
I would like to remain anonymous, please do not release my information.		I hereby authorize any agency of the United States Government by which I may be employed during 2018 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2018 starting with the first pay period ending with the last pay period that begins in December, and to pay the amounts so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be recalled by me in writing at any time before		
			AUG 17, 2015	
		SIGNATURE	DATE	
DISCLOSURES				

Slide notes

After scrolling through the entire list and verifying that every pledge has been physically received and accounted for, you may click the blue button.

Slide 19



Slide notes

Slide 20

TOUR CFC NEXUS MAIN MENU PLEDGING MY PLEDGES & PROFILE MY TOOLS

BULK UNPROCESSED PLEDGES

BULK PROCESSING ONLY APPLIES TO *PAYROLL DEDUCTION* PLEDGES
Cash & Check pledges must still be processed using the single pledge processing tool.

(click to expand headers below)

2011 SAMPLE FEDERAL AGENCY GROUP 1	Sample Federal Agency Y	unit.11	456 Elm Street	Giving, NY 10023	(3 unprocessed pledges)
2011 SAMPLE FEDERAL AGENCY GROUP 1	Sample Federal Agency Z	unit.10	123 Maple Street	Donation, MN 55406	(22 unprocessed pledges)
2011 SAMPLE FEDERAL AGENCY GROUP 2	Sample Federal Agency X	789 Oak Avenue	HelpOthers, MN 55901		(4 unprocessed pledges)
2011 SAMPLE FEDERAL AGENCY GROUP 3	Sample Federal Agency U (ein requested vs ssn)	678 Ash Highway	Grant, MN 55125		(11 unprocessed pledges)
2011 SAMPLE FEDERAL AGENCY GROUP 3	Sample Federal Agency V	345 Birch Circle	Endow, TX 76621		(5 unprocessed pledges)

Slide notes

The pledges for that Federal Agency location are now marked as processed and are removed from the workflow. If you discover that some of the pledges on the bulk list have not been received yet, you should revert to the single process method or wait until all the pledges are in hand.

Slide 21

The screenshot displays the CFC Nexus web application interface. At the top, there is a header with contact information for Minneapolis, MN. Below this is a navigation bar with tabs for CFC NEXUS, PLEDGING, MY PLEDGES & PROFILE, and MY TOOLS. The MY TOOLS dropdown menu is open, showing options like PAYROLL TOOLS, agency user roles, agency overview, comparison report, custom payroll download, process new pledges (single), process new pledges (bulk), view processed-completed pledges report, and paper pledge batch creation. A red text overlay reads: "BULK PROCESSING ONLY APPLIES Cash & Check pledges must still be processed using the PLEDGES processing tool." Below this, a note says "(click to expand headers below)". At the bottom, a table lists three agency groups:

2015 SAMPLE FEDERAL AGENCY GROUP 1	Sample Federal Agency L	unit.10	123 Maple Street	Donation, MN 55406
2015 SAMPLE FEDERAL AGENCY GROUP 2	Sample Federal Agency P	316.4	012 Apple Lane	Provide, WA 98003
2015 SAMPLE FEDERAL AGENCY GROUP 2	Sample Federal Agency Q			

Slide notes

Pledges you have previously processed can be viewed at any time.

Slide 22

CFC NEXUS DEMONSTRATION
12nd Street NE Suite 2005 • Minneapolis, MN 55413 • (855) 263-4321 ext 2 phone • 206-984-3018 fax

MAIN MENU ▾ TOUR CFC NEXUS ▾ PLEDGING ▾ MY PLEDGES & PROFILE ▾ MY TOOLS ▾

PAYROLL - VIEW PROCESSED PLEDGES

(click to expand headers below.)

- 2015 SAMPLE FEDERAL AGENCY GROUP 1**
Sample Federal Agency L
unit.10
123 Maple Street
Donation, MN 55406
(5 processed pledges)
- 2015 SAMPLE FEDERAL AGENCY GROUP 2**
Sample Federal Agency Q
(1 processed pledges)
- 2015 SAMPLE FEDERAL AGENCY GROUP 3**
Sample Federal Agency S
(donor print method)
8854 Charity Road
Seasalt, CA 90215
(2 processed pledges)

1 Select a pledge from the list on the left.
Pledges are listed in reverse chronological order so the newest pledges are at the top.
Pledge details will be displayed in this area.

Slide notes

Here is an example of previously processed pledges. Click on a Federal agency to view what has been processed.

Slide 23

CFC NEXUS DEMONSTRATION
20 2nd Street NE Suite 2005 • Minneapolis, MN 55413 • (855) 263-4321 ext.2 phone • 206-984-3018 fax

MAIN MENU ▾ TOUR CFC NEXUS ▾ PLEDGING ▾ MY PLEDGES & PROFILE ▾ MY TOOLS ▾

PAYROLL TOOLS ▸
agency user roles
agency overview
comparison report

custom payroll download
process new pledges (single)
process new pledges (bulk)
view processed-completed pledges report
paper pledge batch creation

(click to expand headers below.)

2015 SAMPLE FEDERAL AGENCY GROUP 1
Sample Federal Agency L
unit. 10
123 Maple Street
Donation, MN 55406
(5 processed pledges)

2015 SAMPLE FEDERAL AGENCY GROUP 2
Sample Federal Agency Q
(1 processed pledges)

2015 SAMPLE FEDERAL AGENCY GROUP 3
Sample Federal Agency S
(donor print method)
8854 Charity Road
Seasalt, CA 90215
(2 processed pledges)

1 Select a pledge from the list on the left.
Pledges are listed in reverse chronological order so the newest pledges are at the top.
Pledge details will be displayed in this area.

Slide notes

You can also download or view pledge reports.

Slide 24

PAYROLL - REPORT

Agency Group	Agency	Pledges	Dollars	Average Dollars
2015 Sample Federal Agency Group 1	[EXPAND DETAILS]	12	\$7,433.00	\$619.42
2015 Sample Federal Agency Group 2	[EXPAND DETAILS]	3	\$4,911.00	\$1,637.00
2015 Sample Federal Agency Group 3	[EXPAND DETAILS]	2	\$2,054.00	\$1,027.00
2015 CAMPAIGN TOTALS [EXPAND DETAILS]		17	\$ 14,398.00	\$ 847.53

[Download CSV of this report](#)

Slide notes

Payroll Coordinator reports include some donor and pledge details that are not available to other roles.

Slide 25



Slide notes

This is the end of the CFC Nexus Registration tutorial. Happy pledging.