SPX

Employee Matching Gift Program
Online Registration and Application Guide

TABLE OF CONTENTS

Revised 5/4/2016

Registering and Accessing the Online Matching Gift System

1. To access the online matching gift application go to www.fftc.org/spxmatchinggifts.

2. Click on the **SPX Employee Matching Gift Application** link located under the **Matching Gift Application** section of the webpage. This will bring you to the online matching gift center application page where you can start a matching gift application.
   Tip: You may want to bookmark the link to the online matching gift center's application page for future use.

SPX Employee Matching Gift Program

To encourage and support the generosity and community involvement of employees, SPX is proud to offer the SPX Employee Matching Gift Program. Through this program, an employee may request a matching gift from SPX following his or her act of giving a personal donation to an eligible charitable organization. The SPX Employee Matching Gift Program is managed by Foundation For The Carolinas.

Please note that our procedures have changed. We have implemented a new process for submitting employee matching gift requests. All eligible SPX employees requesting a matching gift can do so by completing the online SPX Employee Matching Gift Application available below.

Matching Gift Guidelines and Instructions
Before completing an SPX Employee Matching Gift Application, please review the Matching Gift Program Guidelines for matching gift eligibility information.

If this is your first time accessing the online matching gift application, you will need to register with the online matching gift system. Please carefully review the Matching Gift Registration and Application Guide for guidance.

Matching Gift Application
Eligible SPX Employees and members of the SPX Board of Directors requesting a matching gift can complete the SPX Employee Matching Gift Application.

Frequently Asked Questions
For more information on the SPX Employee Matching Gift Program, please review the Employee Matching Gift Program's Frequently Asked Questions.

3. From the online matching gift center's application page, click the **Apply** button. You will then be directed to the login page where you can register with the online matching gift system.

4. Click the **Create New Account** button. You will then brought to the registration page.

5. From the registration page, enter your registration information in the space provided as follows:

Organization:	SPX
First Name:	Enter your first name
Last Name:	Enter your last name
Login Id: **(Email Format)**	Your login ID will be your email address. The email address entered will also be used for correspondence from the SPX Employee Matching Gift Program.
Password:	Passwords must have a minimum of 8 characters. Passwords must also use at least one upper case letter, lower case letter and number.

6. Once you've successfully registered with the online matching gift system, you may sign-in to access your matching gift application. See the following section for instructions on starting and submitting an online matching gift application.

PLEASE NOTE

- Each employee must register individually. Your login ID will be linked to your matching gift history.

- Once you have registered with the online system, you will receive an automated email from fftcgrants@communityforce.com confirming your registration.

Employee Matching Gift Program
Online Registration and Application Guide

Starting and Submitting a Matching Gift Application

1. Follow steps 1 through 3 under the above section, *Registering and Accessing the Online Matching Gift System* and login. You will be directed back to the online matching gift center application page.

2. Click the **Apply** button to begin your SPX Employee Matching Gift Application.
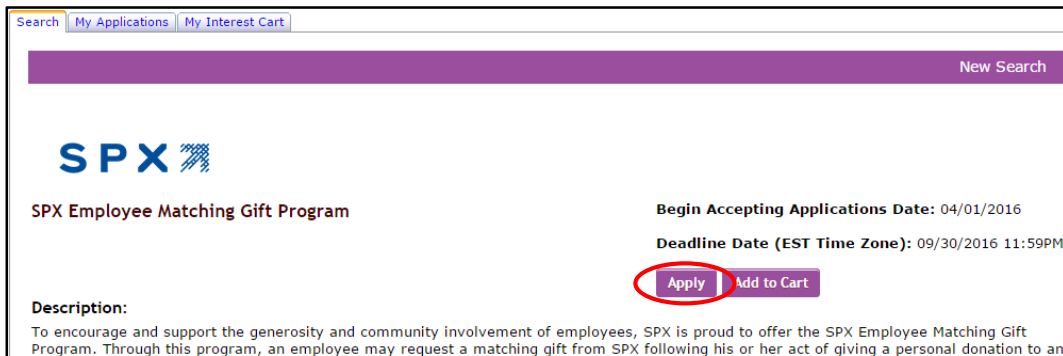
Note: The **Add to Cart** feature will allow you to save a copy of the quarterly application under the *My Interest Cart* tab within your account. Note that each quarter will begin with a new quarterly application.

After you've submitted your first matching gift request, you will notice the following options the next time you go to submit a request:

- **Continue with Application** – Select this to view or complete an existing application.
- **Start a New Application** – Select this option to begin a new matching gift application.
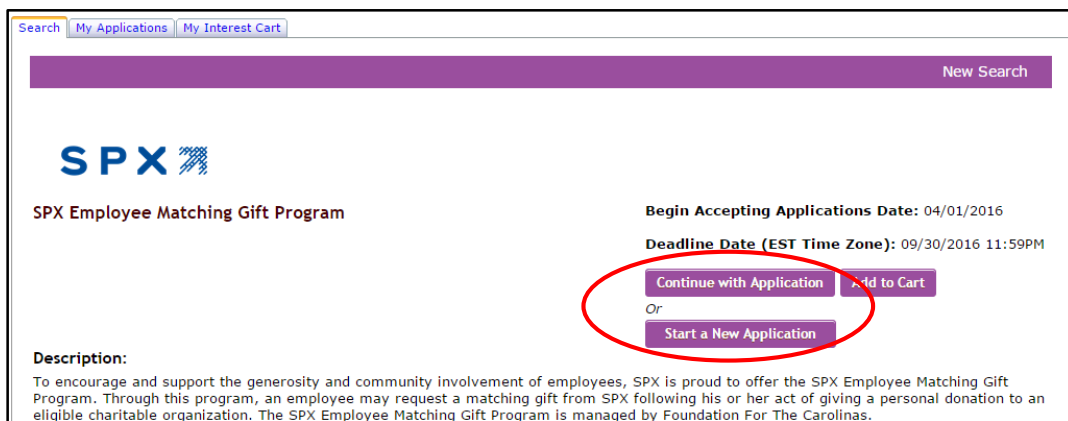
By clicking "Start a New Application", you will be prompted to enter a description for your application. You may enter a brief description for your application, then click Apply.

3. You will then be directed to your application dashboard. There are two sections to completing a matching gift application; the **SPX Employee Matching Gift Form**, and the **Request Section**.

   a) **SPX Employee Matching Gift Form**
      Click on the SPX Employee Matching Gift Form icon to complete your matching gift information. Once you have completed the required fields, click **Save and Return to Dashboard.** Note that any field with a red asterisk (*****) next to it is a required field. You cannot submit an application until all required fields have been completed.

   b) **Request Section**
      Next, click on the Request icon. This is where you will initiate the gift confirmation request to a nonprofit organization. Carefully follow the instructions within this section to complete the gift confirmation request. Once you've completed the request section, click **Return to Dashboard**.

4. When you have completed steps (**a**) and (**b**) above, you are ready to submit your matching gift request. Click the **Final Review & Submit** button located at the top right-hand corner of your dashboard.

5. You will then have the opportunity to review your application. Check the box at the top of the review page and click **Submit** when you are ready to submit your application. Note that you cannot edit your matching gift request once it has been submitted.

☑ Please check the check-box to confirm that you have reviewed your SPX Employee Matching Gift Program application, then click "Submit".
You will not be able to update it after it is submitted.

Submit ▶	Cancel & Exit ▶

Application Summary of : SPX Matching Gifts | McDonah, Kandace

Program Name : Children's Program

SPX Employee Matching Gift Form

*Employee First Name	Kandace
*Employee Last Name	McDonah
*SPX Employee ID **Note:** Officers and members of SPX Board of Directors, please enter your last name.	123456

Employee Matching Gift Program
Online Registration and Application Guide

Viewing Your Matching Gift Status and History

Matching gifts are reviewed and processed on a quarterly basis. Through the online matching gift system, you can view the status of your submitted matching gift requests.

1. Go to the online matching gift center application page and click the **Login** link on the top right hand corner of the page. You will be brought to the login screen where you will enter your username and password.

2. Once you are logged in, go to the **My Applications** tab to view your matching gift history. The status of your request will display under the Status column. The recipient nonprofit organization's name will display under the Program Name column.

Your matching gift status will change as follows:

- **Pending Submission:** Application has been started, but not yet submitted.
- **Request Pending**: Application has been submitted and is pending gift confirmation by the nonprofit organization. (Note: your request will not be considered until the gift confirmation process is complete)
- **Submitted**: Application is submitted and the nonprofit gift confirmation has been received.
- **Award Accepted:** Application has been reviewed and approved for matching.
- **Award Declined:** Application has been reviewed and declined for matching.

Nonprofit Gift Confirmations and the Request Section

The nonprofit gift confirmation step is required in order for your matching gift request to be considered by the SPX Employee Matching Gift Program. Recall that this gift confirmation step is initiated when you complete the Request Section of your application. It is then the responsibility of the recipient contact at the nonprofit organization to verify the gift details through the online matching gift system in order to complete the gift confirmation step.

After submitting a matching gift application, the application status will remain as **Request Pending** until the nonprofit has fulfilled the gift confirmation request. Once the gift confirmation request is completed by the nonprofit organization, you will be notified via email and your application status will change to **Submitted**.

Nonprofit gift confirmations are monitored by the SPX Employee Matching Gift Program Administrator. However, if after several weeks your application status remains as **Request Pending**, you may resubmit the gift confirmation request to the nonprofit via the **Request Section** of your application. Refer to the following steps to resend a gift confirmation request to the nonprofit organization.

1. Go to the **My Applications** tab of your account and click on the link for the matching gift application with the **Request Pending** status. You will be directed to your application's Dashboard.
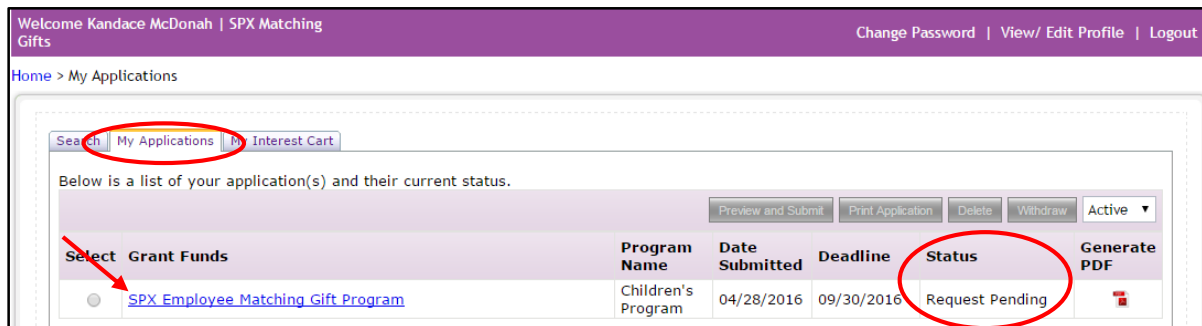
2. From your application Dashboard, click on the **Request Section** icon.

3. Next, click on the email icon to the far right of the *Nonprofit Gift Confirmation Request* link to resend the gift confirmation request to the nonprofit contact listed.

Changing the Nonprofit Contact Information

If you would like to update the nonprofit contact information before resending the gift confirmation request, you may do so by following the directions below:

1. From within the **Request Section** of your application, click on the *Nonprofit Gift Confirmation Request* link and click **OK** to confirm that you would like to resubmit the request.

2. Next, enter the new contact information in the space provided, and click **Email Request**.

Section :	Nonprofit Gift Confirmation Request
Name :	Jane Smith
Email :	kmcdonah@fftc.org
Optional: Additional details provided here will be included in the email for this request.	Please verify receipt of my gift to your organization.

Email Request ▶   Cancel ▶