



## Employee Matching Gift Program Online Registration and Application Guide

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# Employee Matching Gift Program Online Registration and Application Guide



## Registering and Accessing the Online Matching Gift System

1. To access the online matching gift application go to [www.ffc.org/spxmatchinggifts](http://www.ffc.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](#).

# Employee Matching Gift Program Online Registration and Application Guide



- 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.

**FOUNDATION FOR THE CAROLINAS**

Welcome Search for Grant Funds | Login

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**SPX**

**SPX Employee Matching Gift Program**

Begin Accepting Applications Date: 04/01/2016  
Deadline Date (EST Time Zone): 09/30/2016 11:59PM

**Apply**

**Description:**  
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.

**Eligibility:**  
All full-time SPX employees and members of the SPX Board of Directors can participate in the SPX Employee Matching Gift Program.

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

**FOUNDATION FOR THE CAROLINAS**

Welcome Search for Grant Funds | Login

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**Login**

**Sign in**

\* Email

or

\* Password   
Password is case sensitive.

[Forgot Password?](#)

**Welcome to Foundation For The Carolinas' new online grants system. If this is your first time here, you will register as a new applicant. Please follow instructions below.**

**New Applicants:**  
To begin, click the "Create New Account" button below. Your account will be created and tied to your email address. You only need to do this once.

**Returning Users:**  
Enter the Email and Password you used to set up your account and click on the "Login" button.

**Forgot Password:**  
Click on "Forgot Password" link and enter your email address. You will receive an email with a link to create a new password.

# Employee Matching Gift Program Online Registration and Application Guide



Registration

Registration Information:

Please provide the information requested below to create your user account. Be sure to remember your login email address and password for future use. Once you have registered, you may return to the system at any time to begin or complete an application.

Note: For your security, the following password policies are required to create an account.

1. A valid email address must be used as your Login Id. This is how we will communicate with you regarding your application(s).
2. Passwords must have a minimum of 8 characters.
3. Passwords must also use at least one upper case letter, lower case letter and number.

If you have trouble setting up your account, return to the login page and click on the "Help" link at the bottom.

*Questions marked with an asterisk (\*) are required.*

\*Organization :

\*First Name :

\*Last Name :

\*Login Id (Email Format) :

\*Password :

\*Confirm Password :

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

<b>Organization:</b>	SPX
<b>First Name:</b>	Enter your first name
<b>Last Name:</b>	Enter your last name
<b>Login Id: (Email Format)</b>	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.
<b>Password:</b>	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

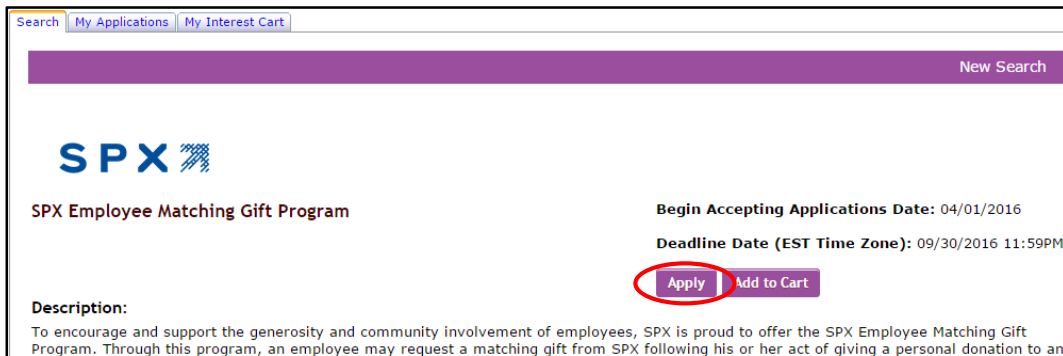
- Each employee must register individually. Your login ID will be linked to your matching gift history.
- Once you have registered with the online system, you will receive an automated email from [fftgrants@communityforce.com](mailto:fftgrants@communityforce.com) confirming your registration.

# Employee Matching Gift Program Online Registration and Application Guide



## Starting and Submitting a Matching Gift Application

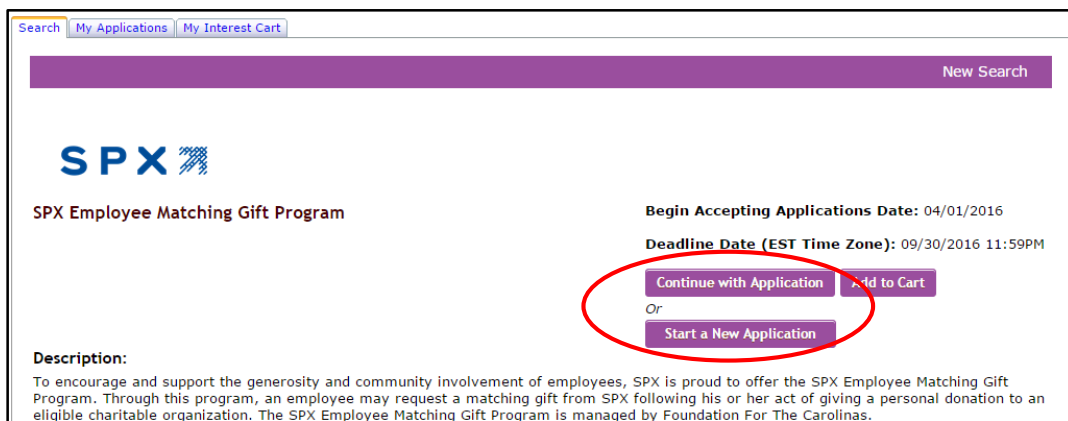
1. Follow steps 1 through 3 under the above section, **Registering and Accessing the Online Matching Gift System** and login. You will be directed back to the online matching gift center application page.
2. Click the **Apply** button to begin your SPX Employee Matching Gift Application.



**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.

**Start a New Application**

This application allows you to submit multiple requests for funding. In order for you to keep track of which project or request please create a name for your request under the description box below.

Description :

# Employee Matching Gift Program Online Registration and Application Guide



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.

# Employee Matching Gift Program Online Registration and Application Guide



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.

**Application Summary of : SPX Matching Gifts | McDonah, Kandace**

**Program Name : Children's Program**

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**SPX Employee Matching Gift Form**

*Employee First Name	Kandace
*Employee Last Name	McDonah
*SPX Employee ID <b>Note:</b> 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.

**FOUNDATION FOR THE CAROLINAS**

Welcome Search for Grant Funds | Login

**SPX**

**SPX Employee Matching Gift Program**

Begin Accepting Applications Date: 04/01/2016  
Deadline Date (EST Time Zone): 09/30/2016 11:59PM

[Apply](#)

**Description:**  
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.

**Eligibility:**  
All full-time SPX employees and members of the SPX Board of Directors can participate in the SPX Employee Matching Gift Program.

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.

**FOUNDATION FOR THE CAROLINAS**

Last Login: 4/28/2016 4:38 PM | [Open Help](#)

Welcome Kandace McDonah | SPX Matching Gifts Change Password | View/ Edit Profile | Logout

Home > My Applications

Search | **My Applications** | My Interest Cart

Below is a list of your application(s) and their current status.

Select	Grant Funds	Program Name	Date Submitted	Deadline	Status	Generate PDF
<input type="radio"/>	<a href="#">SPX Employee Matching Gift Program</a>	Children's Program	04/28/2016	09/30/2016	Request Pending	



# Employee Matching Gift Program

## Online Registration and Application Guide



### 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.

# Employee Matching Gift Program Online Registration and Application Guide



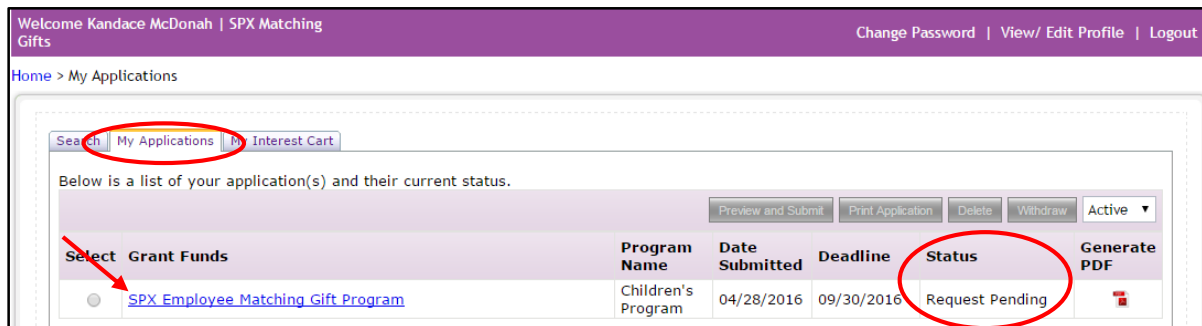
## Nonprofit Gift Confirmations and the Request Section

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.

**SPX Employee Matching Gift Program**  
Welcome to your Dashboard. Please complete each section below. When you have completed both sections, **click the Final Review & Submit button** at the top right hand corner of this page to submit your matching gift request. Matching gift requests are reviewed on a quarterly basis.

- **STEP 1:** To begin your application, click on the "SPX Employee Matching Gift Form" icon below.
- **STEP 2:** Use the "Request" section to send an email request for gift verification to the nonprofit organization to which your gift was made. All gifts must be verified by the nonprofit organization in order to be considered for matching by the SPX Employee Matching Gift Program.
- **STEP 3:** Click the red **Final Review and Submit** button on the top right corner of the screen to review and submit your application.

SPX Employee Matching Gift Form: 100% complete, Deadline 9/30/2016 11:59PM

Request: 100% Requested, 0% Received

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- 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.

Request

This section allows you to send an email request to the nonprofit organization, requesting the verification of your contribution. The nonprofit organization must complete the required information in order for your matching gift request to be considered by the SPX Employee Matching Gift Program.

Please follow the instructions below to initiate the gift confirmation process.

- Click on the Nonprofit Gift Confirmation link below to send a gift confirmation request to the nonprofit organization.
- You will then be asked to enter the the following information:
  - Name:** Enter the name of a contact at the nonprofit organization. If you do not know the name of the appropriate individual at the organization, simply enter the name of the organization.
  - Email:** Enter the email address of the contact at the organization.
  - Notes:** You may enter a brief note about your request. This note will be passed on to the recipient at the nonprofit organization.
- Click Email Request
- You may view the status of the gift confirmation under the Status column of the Request Section. The status will change once the nonprofit organization confirms or declines the gift confirmation request.

**Tip:** A nonprofit organization's matching gift contact information can generally be found on their website or by calling the organization.

Request For	Requested From	Email	Status	Requested Date	Received Date	
<a href="#">Nonprofit Gift Confirmation Request</a>	Kandace McDonah	kmcdonah@fftc.org	Requested	04/28/2016		

Return To Dashboard



## 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:

- 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.

Please follow the instructions below to initiate the gift confirmation process.

- Click on the Nonprofit Gift Confirmation link below to send a gift confirmation request to the nonprofit organization.
- You will then be asked to enter the the following information:
  - Name:** Enter the name of a contact at the organization, simply enter the name of the organization.
  - Email:** Enter the email address of the contact at the organization.
  - Notes:** You may enter a brief note about your request. This note will be passed on to the recipient at the nonprofit organization.
- Click Email Request
- You may view the status of the gift confirmation under the Status column of the Request Section. The status will change once the nonprofit organization confirms or declines the gift confirmation request.

**Tip:** A nonprofit organization's matching gift contact information can generally be found on their website or by calling the organization.

System Message
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Are you sure you want to resubmit this request?

OK
Cancel

Request For	Requested From	Email	Status	Requested Date	Received Date	Access Code	
<a href="#">Nonprofit Gift Confirmation Request</a>	Jane Smith	kmcdonah@fftc.org	Requested	03/08/2016		f35ad449	

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

Section : Nonprofit Gift Confirmation Request

Name :

Email :

Please verify receipt of my gift to your organization.

Optional: Additional details provided here will be included in the email for this request.