



Employee Matching Gift Program Online Registration and Application Guide

TABLE OF CONTENTS

<u>Registering and Accessing the Online Matching Gift System</u>	2
<u>Starting and Submitting a Matching Gift Application</u>	4
<u>Viewing Your Matching Gift Status and History</u>	7
<u>Nonprofit Gift Confirmations and the Request Section</u>	8

Employee Matching Gift Program Online Registration and Application Guide

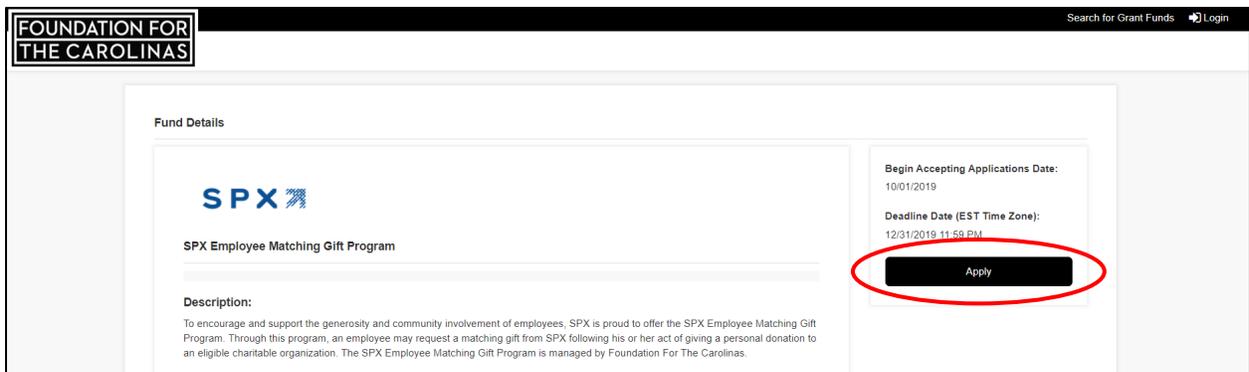


Registering and Accessing the Online Matching Gift System

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



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.



Employee Matching Gift Program Online Registration and Application Guide



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

Login

Email

Password

[Forgot Password?](#)

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.

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

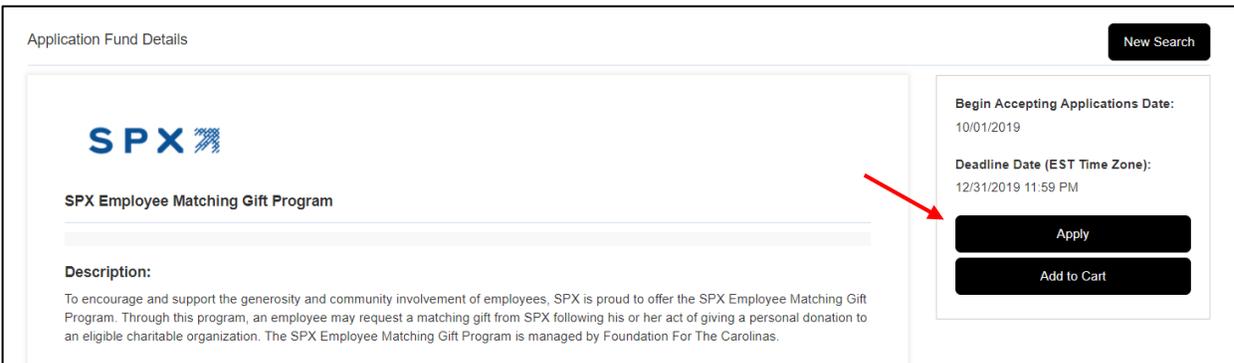
- Each employee must register individually. Your login ID will be linked to your matching gift history.
- Once you have registered with the online system, you will receive an automated email from fftgrants@communityforce.com confirming your registration.

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**.

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**.

Deadline for Submission || 12/31/2019 11:59 PM (EST)

Choose Action ▾ Final Review and Submit

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:** Click the "SPX Employee Matching Gift Form" icon below and complete this section.
- **STEP 2:** Click the "Request" icon below and follow the instructions to send an email request for gift verification to the recipient nonprofit organization. All gifts must be verified by the nonprofit organization in order to be considered 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
0%
Deadline: 12/31/2019 11:59 PM
Modified by: N/A
Modified on: N/A

Request
Requested: 0.00%
Received: 0.00%

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.

Deadline for Submission || 12/31/2019 11:59 PM (EST)

Choose Action ▾ Final Review and Submit

SPX Employee Matching Gift Program
Welcome to 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

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

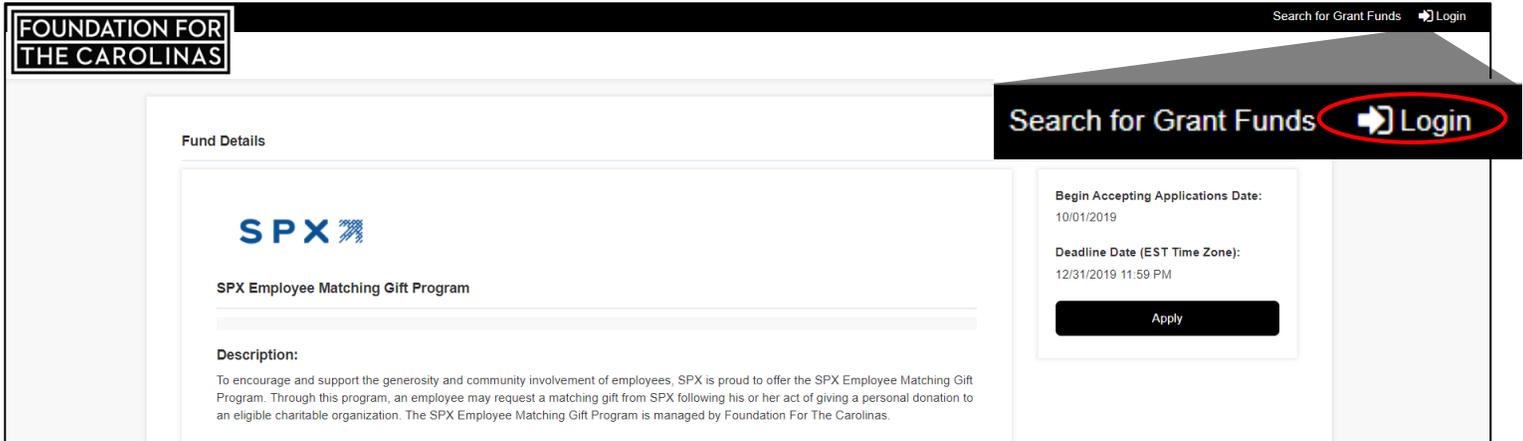
Employee Matching Gift Program Online Registration and Application Guide



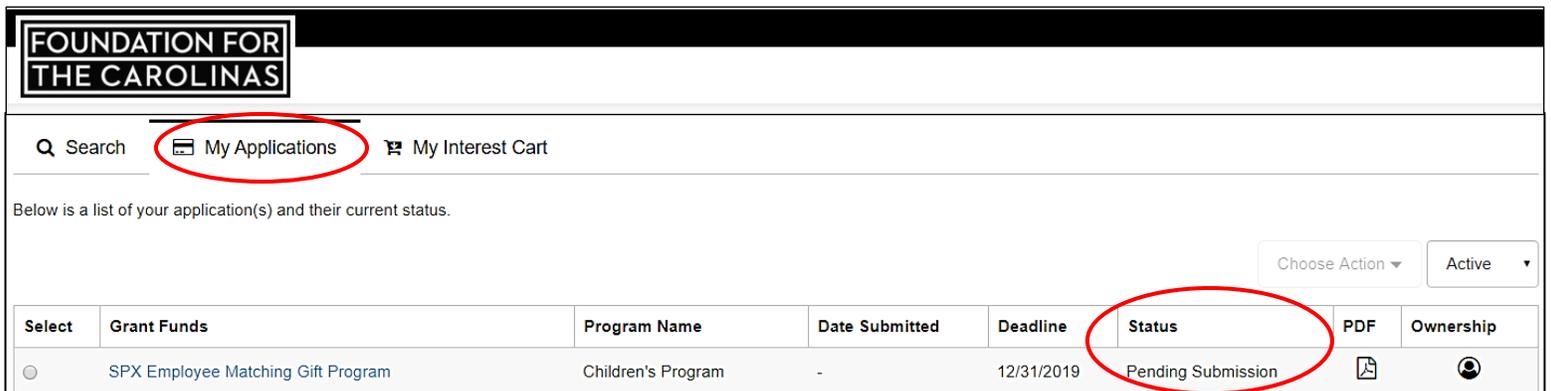
Viewing Your Matching Gift Status and History

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 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 processed until the gift confirmation process is complete)
- **Submitted:** Application has been submitted and the nonprofit gift confirmation has been received.
- **Award Accepted:** Application has been approved and the matching gift has been processed.
- **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 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 completed 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.

Select	Grant Funds	Program Name	Date Submitted	Deadline	Status	PDF	Ownership
<input type="radio"/>	SPX Employee Matching Gift Program	Favorite Charity	4/22/2019	6/30/2019	Request Pending		

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:** Click the "SPX Employee Matching Gift Form" icon below and complete this section.
- **STEP 2:** Click the "Request" icon below and follow the instructions to send an email request for gift verification to the recipient nonprofit organization. All gifts must be verified by the nonprofit organization in order to be considered 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%

Deadline: 12/31/2019 11:59 PM
Modified by: McDonah, Kandace
Modified on :: 10/24/2019 1:44 PM

Request

Requested: 100.00%
Received: 0.00%

Employee Matching Gift Program Online Registration and Application Guide



- Next, click on the **'Resend'** icon to the far right of the **Nonprofit Gift Confirmation Request** link. An email will automatically be sent to the nonprofit contact to request the gift confirmation.

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 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	Resend
Nonprofit Gift Confirmation Request	Kandace McDonah	kmcdonah@fftc.org	Requested	10/24/2019		

Resend

[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 nonprofit organization. If you do not know the name of the appropriate individual at the org
 - Email:** Enter the email address of the appropriate contact at the organization
 - Notes:** You may enter a
- Click Email Request
- You may view the status of t

Tip: A nonprofit organization's

×

System Message (166)

Are you sure you want to resubmit this request?

Ok

Cancel

Request For	Requested From	Email	Status
Nonprofit Gift Confirmation Request	Kandace McDonah	kmcdonah@fftc.org	Requested

Employee Matching Gift Program Online Registration and Application Guide



- 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.