

Greater Twin Cities United Way Agency Portal Instructions

Welcome to the Greater Twin Cities United Way (GTCUW) Agency Portal. The Agency Portal is a secure reporting system that will allow you to obtain and download detailed information about gifts designated to your organization through GTCUW. Below is some general information about each report and how to navigate the system.

REQUEST A NEW ACCOUNT OR REMOVE CURRENT USERS:

Please use [this form](#) to register a new Agency Portal user or remove current users for your Agency. You may use the Report **All Active Users from my Organization** on the new [Agency Portal](#) to see who currently has access to the Portal for your organization.

CONTACT OUR SUPPORT TEAM

[Contact our support team](#) for log-in help or questions about reports and payments. Please ensure **Your United Way** is set to Greater Twin Cities United Way.

REPORT INFORMATION:

Reports can be accessed online and exported as a formatted or details only excel file. Below are the reports available to you in the reports tab:

For Agencies and United Ways:

Distribution Payee

Contains pledge designations (called GAU Allocations) with payout details grouped by donor, and designation.
*filter by pay batch number

Donor Designations

Contains designations with pledge info, agency and donor contact details. *click current to view current distribution

Overpayment Corrections

Payout correction details and designation (GAU Name).

All Active Users in My Organization

Contains the details for all the users from your current organization who have an active user account on the UW Agency Portal. The purpose of this report is so an agency or UW can verify and de-activate any users who should no longer have access to this sensitive donor information.

Relevant to United Ways only:

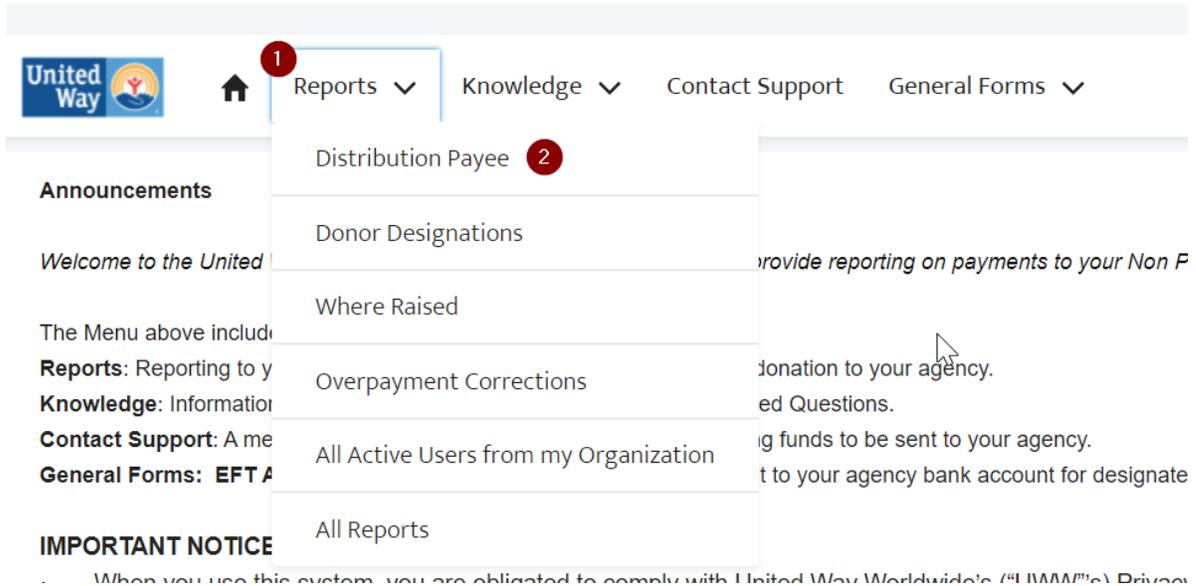
Where Raised

This report contains data on payees, allocations, donor, pledge and Where Raised LUW details. The Where Raised refers to the dollars raised within a specific United Way coverage area. **Important Note:** Reported dollars in this report are NOT what a LUW will receive. The WR report only reports dollars raised within the coverage area and does not present designations to agencies or other United Ways.

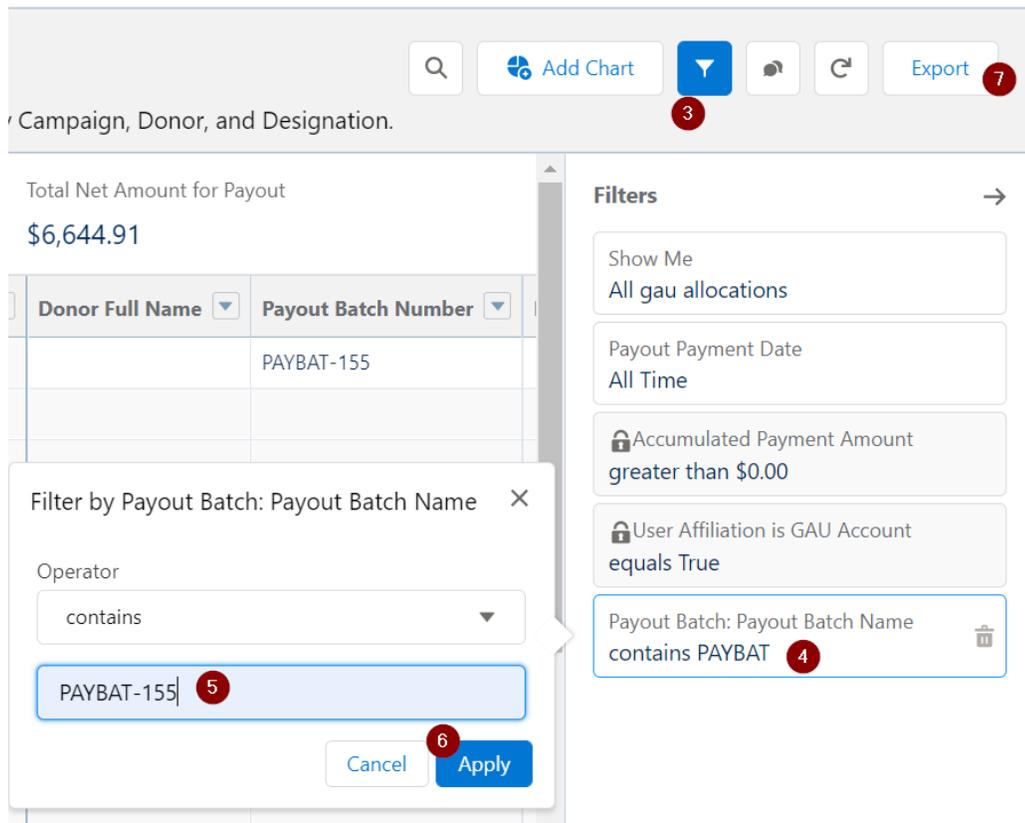
ACCESSING DISTRIBUTION PAYEE REPORT:

Below are steps for accessing and filtering the distribution payee report.

1. Select the reports dropdown
2. Select the needed report (the report may take a few moments to load)



3. Locate the Payment Batch number on your check stub or the subject line of your disbursement email. Your check stub will show which payment batches include your agency, while the disbursement email will show all of the payment batches run for the month.
4. Filter the report results for that batch. Do not change the date filter



5. Export batch results for your records as a formatted report or as details only. Formatted Report will look just like the online layout and is in an excel format. Details Only allows for further filtering/calculations and uploading to your system and is in an excel format.

Export

Export View

Formatted Report

Export the report, including the report header, groupings, and filter settings.

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xlsx

Cancel

Export