Credit Card Transmittal
Overview and Instructions

Version 1.1 10/04/2019

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
Credit Card Transmittal Overview

The University of Illinois Foundation has offered a credit card transmittal form for many years. However, the safest and most secure way for donors to make a credit card gift or establish a recurring credit card commitment is for the donor to enter this gift or commitment themselves through a giving site. Please encourage donors to enter their gifts or recurring credit card commitments through the unit giving site, the University giving site or the Foundation giving site.

If the donor insists that you enter the credit card or recurring credit card commitment on their behalf, please use the unit giving site, the University giving site or the Foundation giving site to submit outright gifts or recurring credit card commitments on behalf of donors. Please note that recurring credit card commitments cannot have a non-gift or non-tax-deductible.

For credit card transactions that are charitable and are either all or a portion non-gift/non-tax deductible, and which necessitate entry by the unit, please use the credit card transmittal: https://portal.uif.uillinois.edu/creditcardtransmittal

Only one donor and one transaction can be entered on the credit card transmittal at a time.

It is critical that the billing address for the credit card being charged is available to be entered when the credit card number, etc. is entered. A donor should always be asked if the billing address for the credit card being charged is the same as the address being provided or is in TED. The billing address entered will not overwrite the donor’s address on the email confirmation, in TED or on the receipt. It will only be used to charge the credit card.

For other online credit card processing needs, the Foundation offers CVent for any Advancement related events, including those that have tickets that include a gift portion and/or offer an option to make an additional gift when purchasing a ticket. Contact eventreview@uif.uillinois.edu for additional information.

Additionally, there is an on Online Giving option for those sites/needs that are Advancement related, have a charitable purpose, and some or all of the transaction is non-gift or non-tax-deductible. Contact creditcardsignup@uif.uillinois.edu for additional information.

The credit card transmittal is for internal University of Illinois Advancement use only. A donor should never be directed to use the credit card transmittal.

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
COMPLETING THE CREDIT CARD TRANSMITTAL

If you have questions while completing the Credit Card Transmittal, please contact Gift Administration at 217-333-0675.

Open the Credit Card Transmittal: https://portal.uif.uillinois.edu/creditcardtransmittal

1. Enter the designation name and designation lookupID from TED.

For transactions that have a non-gift/non-tax-deductible portion, the gift designation name and lookupID from TED should be entered. The lookupID should be 8 digits and will normally start with a 1.

For transactions that are all non-gift/non-tax deductible, the non-gift designation name and lookupID from TED should be entered. The lookupID should be 8 characters and will start with an N.

It is critical that the correct TED designation name and lookupID are entered. If you do not have access to TED or have questions about the appropriate TED designation name and/or lookupID, please contact Gift Administration at 217-333-0675.

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
2. Enter the Gift Amount and Non-Gift Amount for the transaction.

The total of these two amounts should equal the total that is to be charged for this transaction. The total of both the gift and non-gift amounts will be displayed in the Payment Information section of the credit card transmittal.

Please complete the form below and click CONTINUE to complete the transaction.

<table>
<thead>
<tr>
<th>TED Designation Lookup ID and Title</th>
<th>Gift Amount</th>
<th>Non Gift Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chancellor's Fund Unrestricted - 11330007</td>
<td>$50.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>Total:</td>
<td>$50.00</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

If the transaction is all non-gift/non tax-deductible, enter 0 in the Gift Amount field blank.

Please complete the form below and click CONTINUE to complete the transaction.

<table>
<thead>
<tr>
<th>TED Designation Lookup ID and Title</th>
<th>Gift Amount</th>
<th>Non Gift Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chancellor's Fund Unrestricted Non-Gift - N1556000</td>
<td>$0.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>Total:</td>
<td>$0.00</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

3. Enter the name, address, etc. for the donor.

4. Enter the Business information for the donor, if it has been shared.

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
5. Please note the Billing Address is a required field. Check the box indicating the billing address is the same as above or enter the alternate billing address for the credit card in the box below.

Please note that the only option is to charge the total amount of the transaction at one time. There is no option to create a recurring schedule for any transactions that are all non-gift/non-tax-deductible or are a portion non-gift/non-tax-deductible.

6. Enter the name and additional information if the transaction has a gift amount and is in honor of or in memory of an individual. If a transaction is all non-gift/non-tax-deductible, the tribute option is not available.

7. Enter the name of the spouse/life partner, if provided. Click the appropriate radio button to indicate if it is a spouse or life partner.

Please note that all transactions with a gift portion will be processed as joint with the spouse/life partner that is in TED, regardless if this information is completed. If the donor does not wish the transaction to be joint with his/her spouse or life partner, please note in the Additional Instructions box.

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
8. Enter the name of any matching gift company, if applicable.

**Matching Gift Information**
My company will match my gift: ☑

* Company Name:
  State Farm

9. Enter contact information for who to call if there are questions, a Unit Reference Number (if applicable) and any additional information to ensure accurate processing of the transaction. Please note the 250 character limit for this field. If additional information needs to be entered, please use the Why I gave today field.

**Additional Instructions**
Include contact information for questions, Unit Reference Number (if applicable) and additional instructions for accurately processing the gift.

© Yes ☐ No

250 character limit

10. Enter any information about why the donor gave, if applicable. This field may also be used if there is information to be provided that will not fit in the Additional Instructions field.

**Why I gave today?**
Would you like to share with us why you chose to give today?
© Yes ☐ No

250 character limit

11. Check the box in the Additional Information box if the donor has indicated an interest in more information on planned giving methods.

**Additional Information**
☐ Please send information on giving through planned giving methods such as bequests, charitable trusts, charitable gift annuities, and life estates.

** Confidential information must be stored in a secure environment and should not be redistributed electronically except to persons authorized to receive such content. **
12. Click Continue to advance to the Complete Payment Screen.

13. If the credit card billing address is different than what is displayed on the Complete Payment Screen, Click the ← left arrow to view the Contact & Billing Screen. Update the Address, City, State and Zip to the billing address provided by the donor for the credit card being used. Then Click Continue to Payment →.

14. Enter the credit card number, expiration date and CSC. The CSC is also known as the security code, CVV or CID and is a three digit number on the back of the Visa, Mastercard and Discover or a four digit number on the front of an American Express. The credit card cannot be charged without the CSC.

15. Note the total of gift amount and non-gift/non-tax deductible amount will display at the bottom.

16. Click Finish and Pay →.
If the transaction is successful, the online confirmation will display.

Because the Fund Name was manually typed in, it will display as Designation Indicated by the Donor in both the online confirmation and in the email confirmation received by the donor. None of the additional information provided in the Additional Gift Information section can be displayed. However, the information will appear in the batch for the processor when the transaction is processed.

If the transaction is not successful, a message will appear in a pink box, at the top of the screen indicating the issue. Do not attempt a credit card more than three times. If a credit card fails three times, do not attempt the charge again. Contact the UIF Cash Desk at 217-244-2706 for assistance.

There is no ability to provide an email confirmation to the unit entering a transaction via the credit card transmittal.