External Match Guidelines

How do I submit a request for an external match?

Visit **giving.uhg.com** and select "**Request a Match**" under Quick Links.

What donations are eligible for matching?

To be eligible for a matching gift, an organization must be:

- Recognized as a non-profit, tax-exempt organization or public charity by the appropriate local governing body (for example, in the U.S., this is the Internal Revenue Service which dictates which organizations are eligible under Code 501(c)(3))
- An accredited public or private college university or K-12 school
- A government unit benefiting the public, such as a library, under 170(c)(1)
- Faith-based organizations are eligible if the program primarily provides social services

Using the search tool on **giving.uhg.com**, nonprofits eligible for the match have a green **Matching Offer** tag next to their name.

The contribution must be made by a UnitedHealth Group employee – match requests submitted on behalf of non-employees, or groups of employees, will not be processed.

When can I request a match?

You can request a match at **giving.uhg.com,** 365 days a year. The deadline for submitting 2020 match requests is January 31, 2021. No exceptions will be made for late submissions.

Who is eligible to participate?

All employees of UnitedHealth Group, including those on leave of absence, are eligible to participate. Employees of U.S.-based acquired or merged companies who are eligible to participate will receive a United for Giving welcome email with their login information. Contracted and leased employees are not eligible for the program.

When does an organization receive my donation?

External match requests are reviewed after the close of the month of submission; they are then paid out at the end of the following month. For example, if you submit a match request in January, it is reviewed in February and paid at the end of March.

Receipt Guidelines

What type of receipt do I need to provide?

Receipts for external match requests must adhere to the following criteria:

- Receipt is on official letterhead from the nonprofit, and clearly displays the nonprofit name, address and tax ID
- Receipt must include the employee's name, donation date and tax-deductible amount of the donation
- Receipt states that "no goods or services were exchanged for this donation"
- Document is in a non-editable format – PDF, email and JPEG of a paper receipt are acceptable formats

What type of document do I need to provide for a donation made through my charitable-gift, donor-advised or family fund?

Transaction confirmation for this type of external match request must adhere to the following criteria:

- Document is from the financial institution that administers the charitable-gift, donor-advised, or family fund; thank you letters from the nonprofit will not be recognized
- Document includes the employee's name, and the date of the grant payment
- Document displays the nonprofit name, address and tax ID
- Document is in a non-editable format – PDF, email and JPEG are acceptable formats

Employees may be requested to provide additional documentation to support their matching gift requests.