

TRACKING AND ENGAGEMENT DATABASE – TED USER GUIDE

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Important Notes:

- Recent changes to the TED home page and other TED screens may vary from the documentation screen shots shown here.
- UI Reporting section has been removed from the TED USER GUIDE and moved to the new TED Reporting Guide. This can be found on the UIF Help tab.

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GENERAL INFORMATION

The following section provides an overview of the University of Illinois Advancement Tracking and Engagement database, known as TED.

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INTRODUCTION TO TED

ADVANCEMENT COMMUNITY TRACKING AND ENGAGEMENT DATABASE

TED is the Tracking & Engagement Database used by the University of Illinois Advancement community to track a wide range of information related to advancement work. TED helps improve constituent engagement, build stronger relationships, and meet fundraising challenges by providing an organization-wide toolset for managing our constituent base.

The University of Illinois Foundation (UIF) is the official fundraising and private gift-receiving organization for the University of Illinois System and its three universities in Urbana-Champaign, Chicago, and Springfield. UIF works closely with alumni and friends, faculty and staff, corporations and foundations, and campus development professionals to create fundraising programs and opportunities that benefit the University and its excellence in teaching, research, public service, and economic development.

Background

After a thorough process of selecting a vendor, Blackbaud CRM was chosen, and we named our system TED. This two-year selection and implementation process was the Advance Illinois Project. The project mandate was to replace the FACTS legacy system with Blackbaud CRM and provide document management, business intelligence, and additional functionality for the Advancement community. Much of the data from our legacy system was mapped to TED, and our conversion went live November 23, 2015.

In addition to TED, we rolled out the Hyland OnBase document storage system in 2015. OnBase stores various kinds of documents relating to advancement, gift documentation, and constituent correspondence. Some documents stored in OnBase surface in TED for easy access.

TED

Pages displayed in TED will vary based on user access settings.

TED is a web-based system that authorized users can access at http://ted.uif.uillinois.edu.

OnBase

OnBase is a web-based system that authorized users can access at https://edms.uif.uillinois.edu/.

Most users will access OnBase through the web client (link above), but some authorized users may access OnBase using the Outlook Integration or Word Integration.

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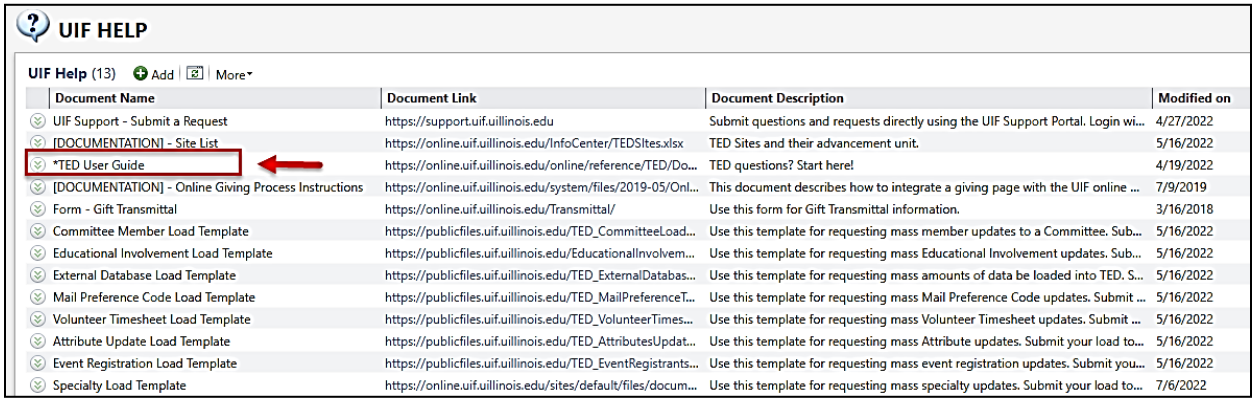
HOW TO GET HELP WITH TED

RESOURCES FOR TED USERS

Documentation and Resources

Help is available within TED under UIF Help in the blue navigation bar.





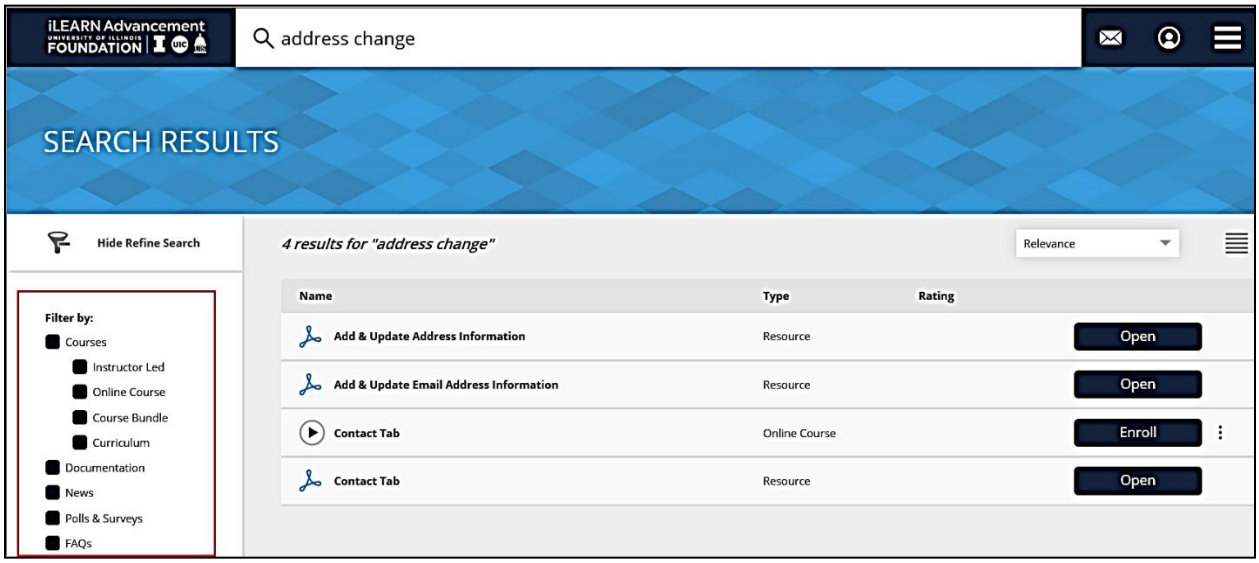
The UIF Help contains links to the TED User Guide, help templates and additional documentation.

From iLearn, type a word of phrase in the search field to view available courses, documentation, and resources. Filters are available to further refine your search.

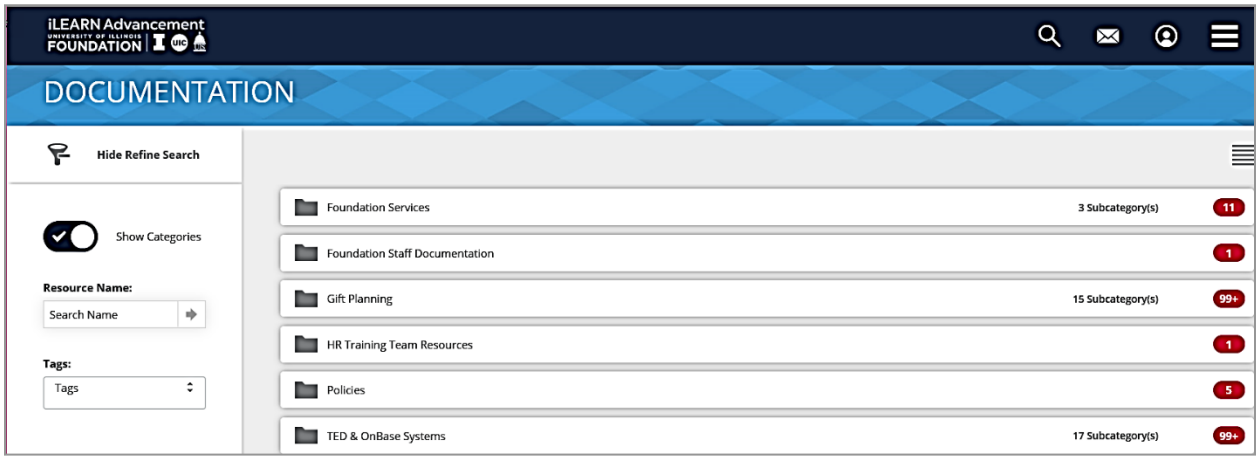


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From the iLearn home page, the documentation tile will take you to the full catalog, organized by subject.



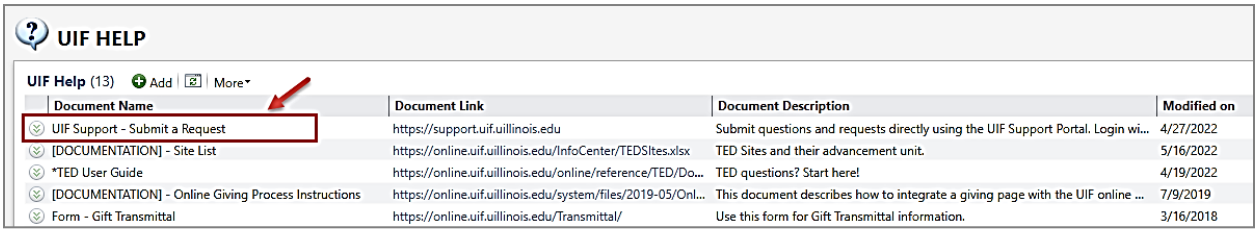
UIF Advancement Information Management and Support

The UIF Advancement Information Management and Support (AIMS) department is available to answer your questions or direct you to the appropriate department that can provide assistance.

Phone – (217) 300-3907

Email – aims@uif.uillinois.edu

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Click the UIF Support portal link located under UIF Help in the blue navigation bar in TED.

You will be prompted to login in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



This allows you to submit additional details, including a file or screenshots that will assist us in resolving your issue.

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HOW TO LOG INTO TED

ADVANCEMENT TRACKING AND ENGAGEMENT DATABASE

TED is the University of Illinois Tracking and Engagement Database. This system is used by the Illinois Advancement community to track a wide range of information related to our constituents. Our system is also referred to as CRM, or Constituent Relationship Management System.

TED is a web-based system accessed from your web browser. TED access is requested by your supervisor by a submitting an Access Request Form.

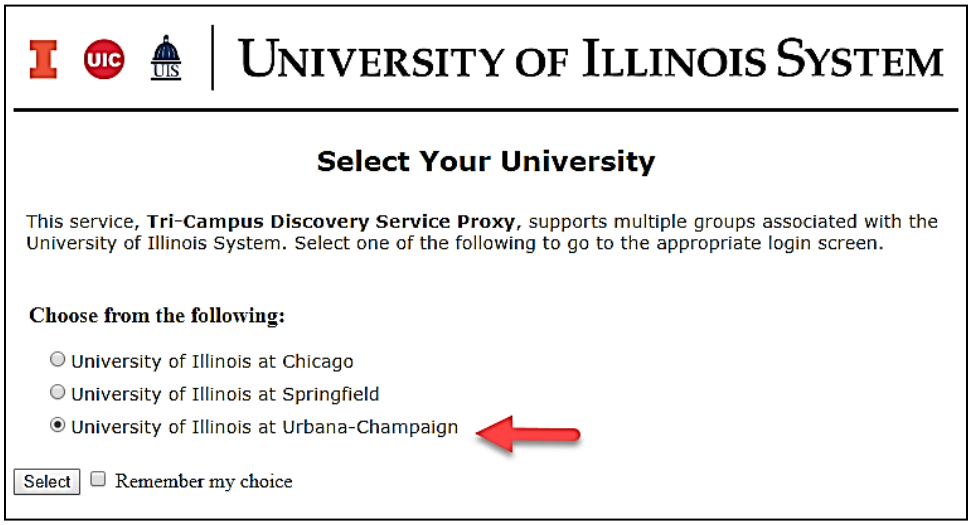
Links

Production environment – https://ted.uif.uillinois.edu

Training environment – https://tedtraining.uif.uillinois.edu

Login Screen

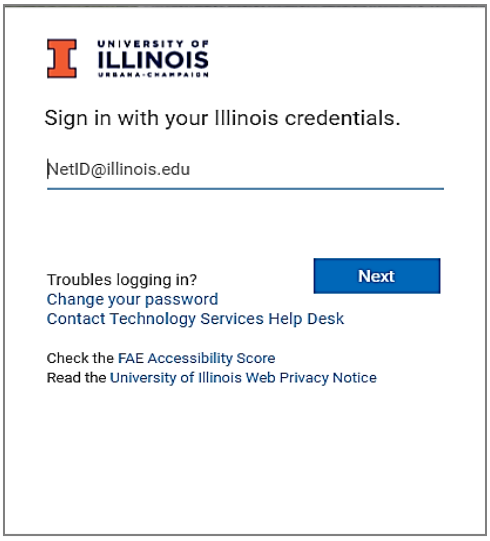
Choose your campus below

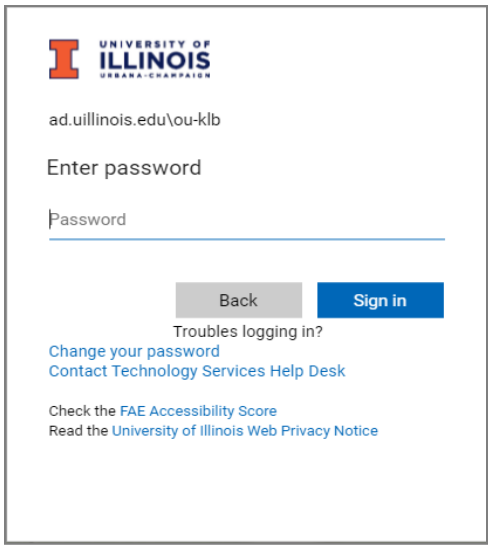


Login Screens

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Log in with your full university email and click Next.



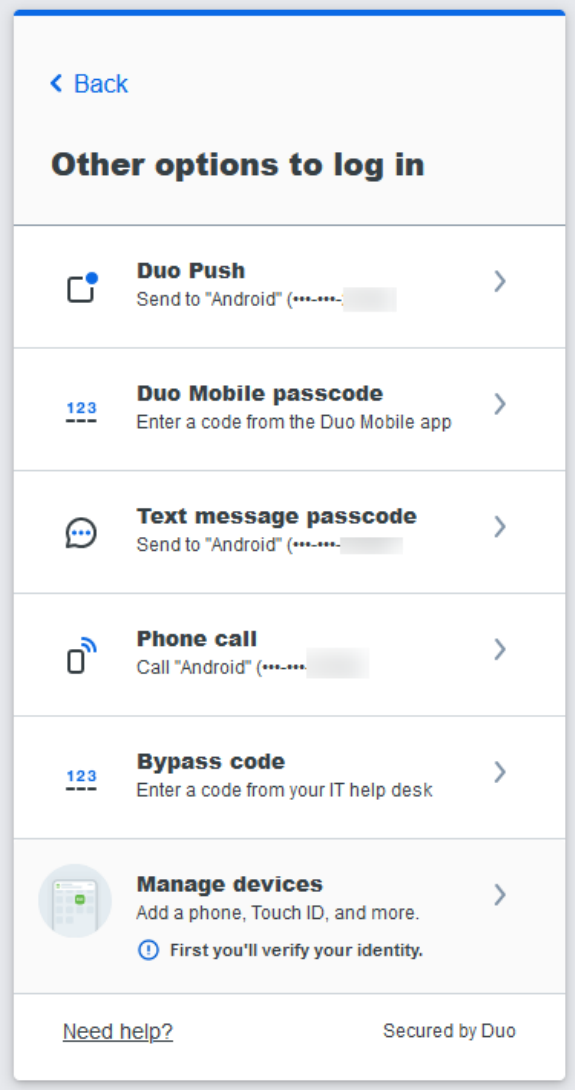


Enter your
Password and click Sign in

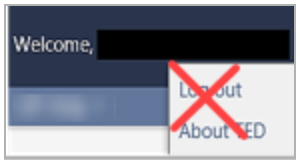
Two- Factor Authorization

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TED uses two-factor authentication as an added security measure. Click on the method of contact.







Log out with the X in the upper right corner of your browser. Due to the 2 Factor Authentication process, the Log out option above 'About TED' in the dropdown shown is disabled.

Off-Campus Access

If you need to access TED outside of one of the University of Illinois locations, access can be made via a Virtual Private Network (VPN) connection.

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If you need to install a VPN connection on your computer, tablet, or smartphone, visit one of the following sites for your University-specific instructions:

UIC – http://accc.uic.edu/service/vpn

UIS – http://www.uis.edu/informationtechnologyservices/connect/vpn/

UIUC – http://techservices.illinois.edu/services/virtual-private-networking-vpn/details

Note: Once authenticated for your campus, the TED session is good for 12 hours once logged in.

REVIEWED 7/29/24

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TED ON MOBILE DEVICES

ACCESSING TED ON YOUR MOBILE DEVICE

This document is intended to assist users with accessing TED on their mobile devices.

Mobile Access

TED is web-based and may be accessed on mobile devices such as a tablet or phone. This is not an "App," it is simply a streamlined mobile view. The general desktop view may be sufficient for those using a tablet, +however, once you are reduced to the size of most phones, the mobile view is more useful.

In order to access TED, you must be using a campus connection or have a VPN configured. Check with your unit's technology staff about your specific VPN procedures. General information may be found here:

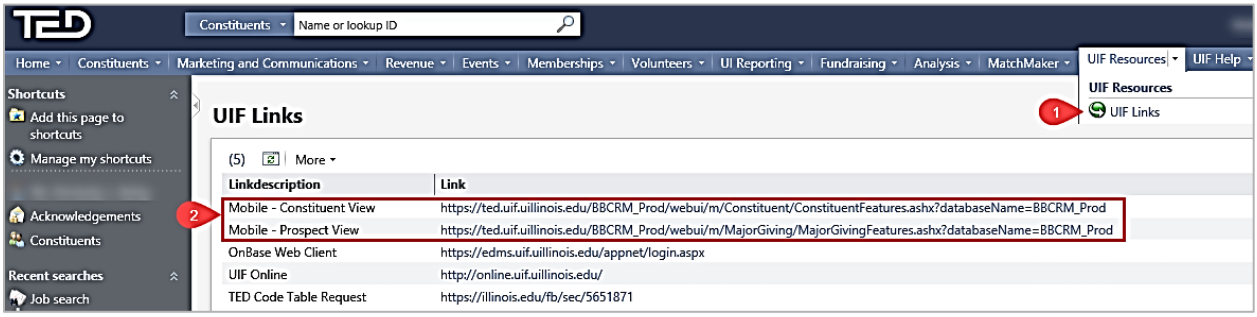
https://techservices.illinois.edu/services/virtual-private-networking-vpn/download-and-set-up-the-vpn-client

Once your VPN is configured, go to the TED site, and log in:

https://ted.uif.uillinois.edu/

There are two methods to get to the mobile site.

1. Click "UIF Resources" in the upper blue Navigation Bar and go to UIF Links.
2. Click on the **Mobile – Constituent View** or the **Mobile – Prospect View** link.



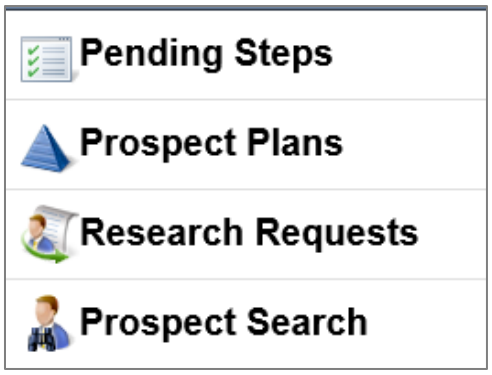
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Mobile- Constituent View

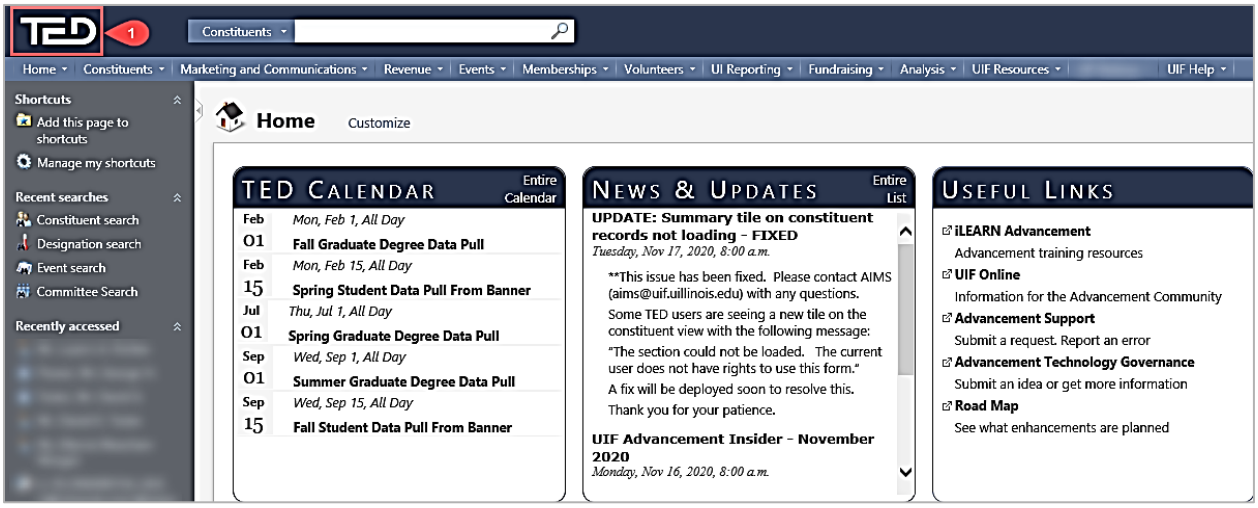


Mobile- Prospect View



Or:

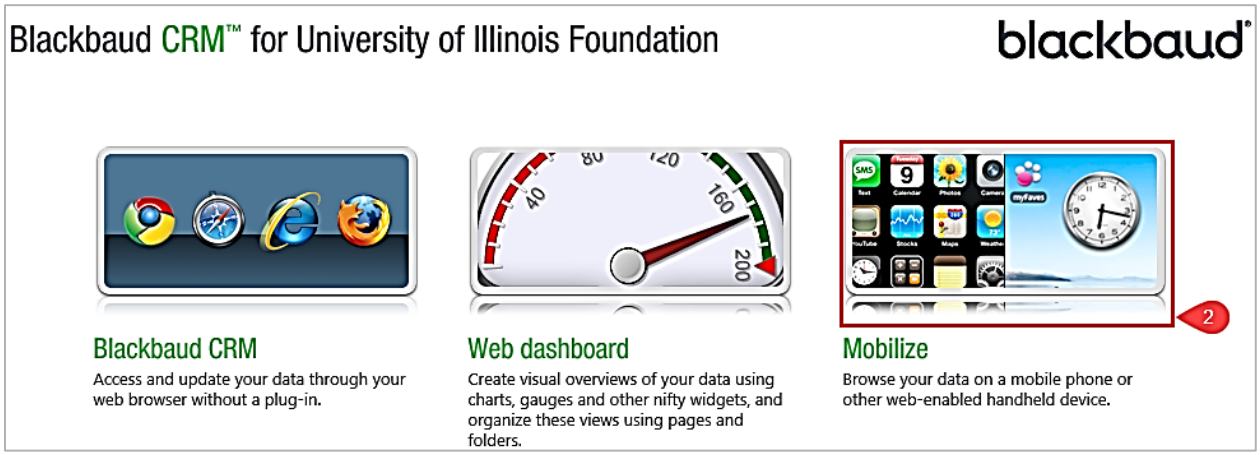
1. Click the **Ted** logo in the upper left.



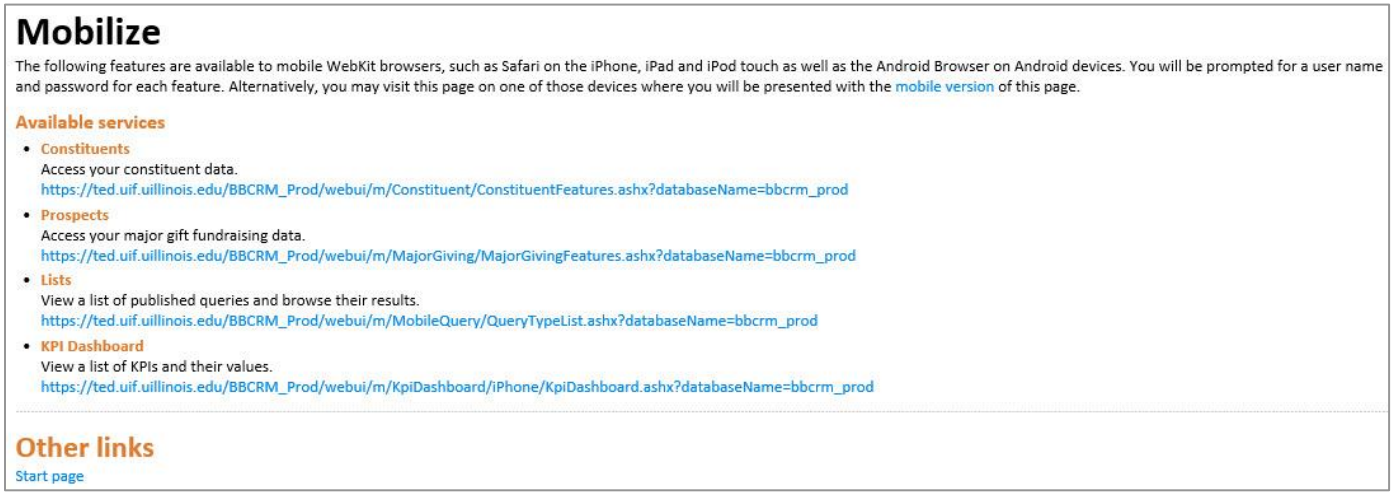
2. Click **Mobilize**.

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This will bring you to the mobile site which has access to critical functions such as looking up constituents, filing contact reports, and reviewing Prospect lists.



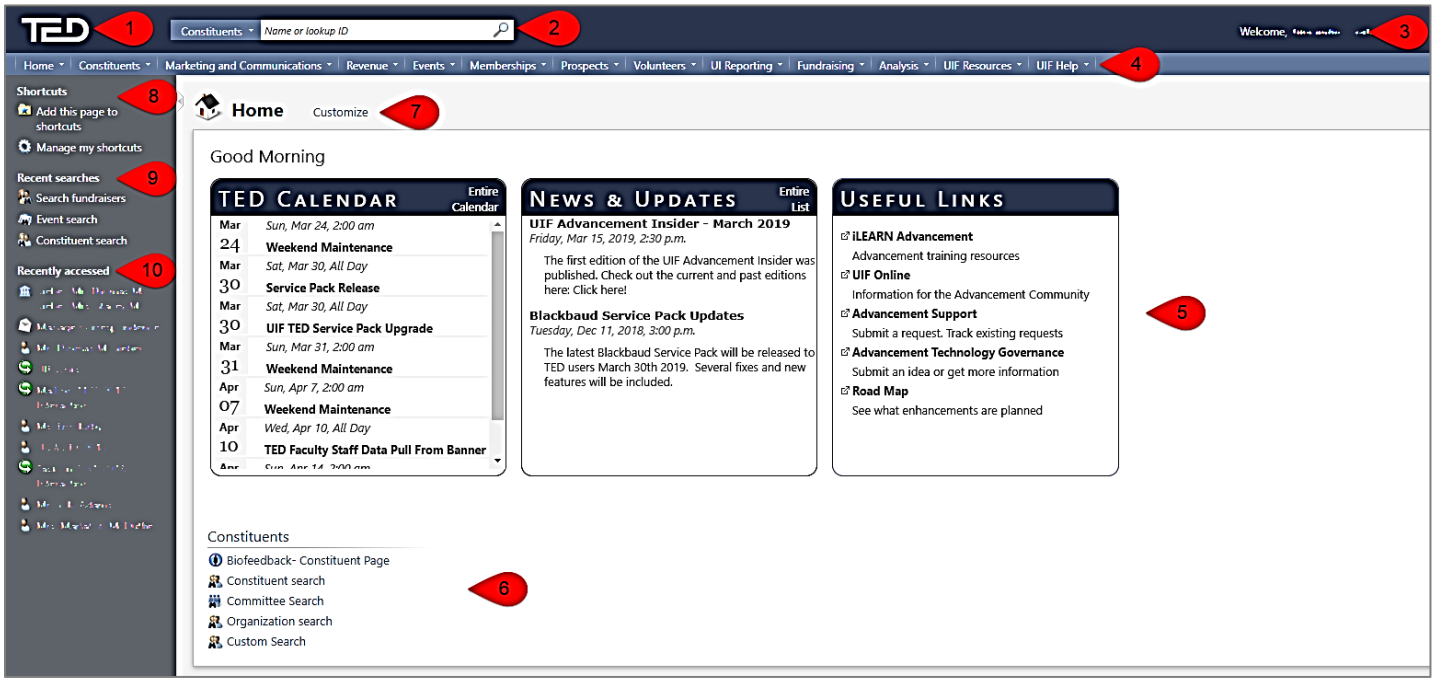
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HOME PAGE FUNDAMENTALS

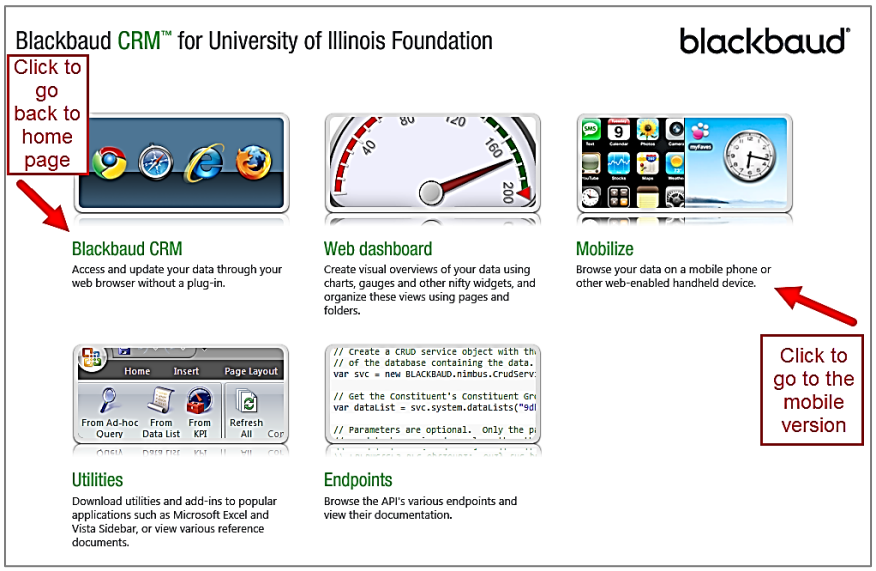
EACH AREA EXPLAINED

The home page of TED appears when you log in and will vary based on your access. Each section is identified below. Features such as the shortcuts, recent searches, recently accessed and customize can make TED user-friendly and put the information you need right at your fingertips.



1. **TED logo** – Click the TED logo to navigate to the menu with a mobile option.

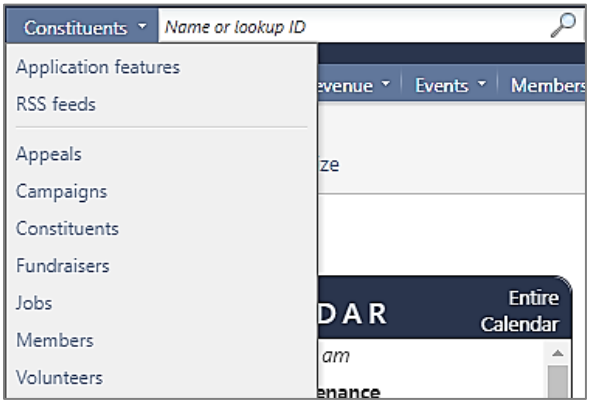




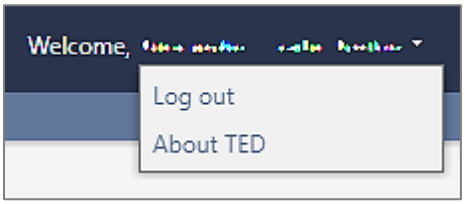
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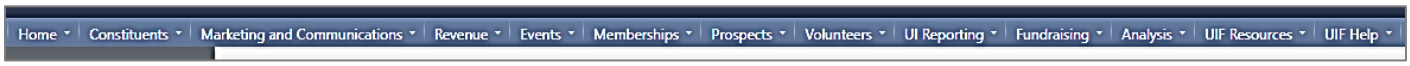
2. **Quick Find Search window** – Corresponding dropdown allows you to quickly search the system for specific items. The options available will vary based on your access. Constituent is a common choice to search for constituent records.



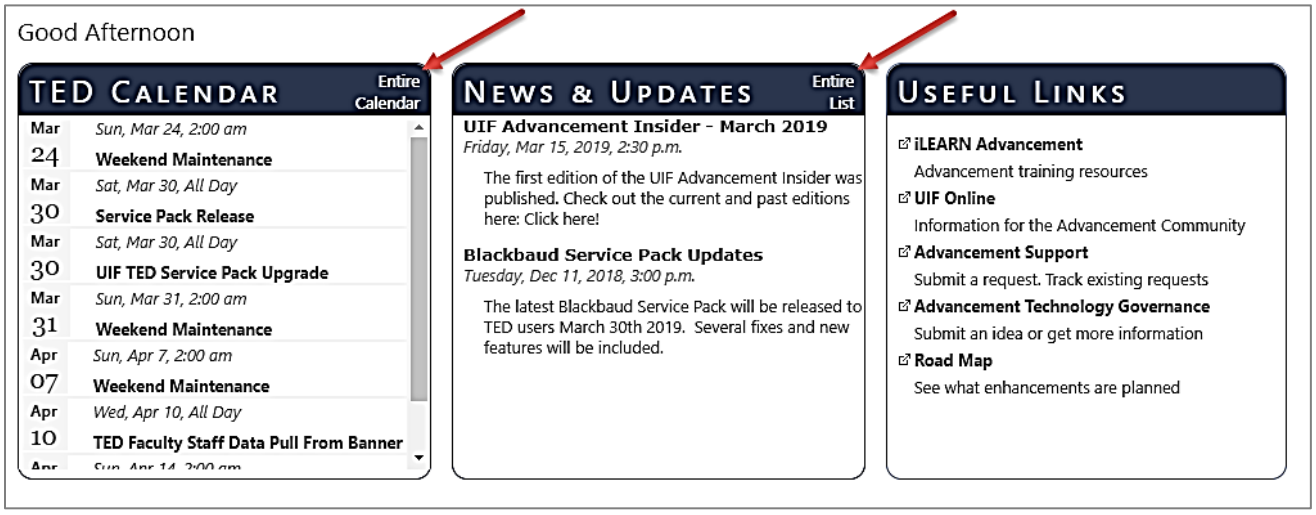
3. **Welcome, Username dropdown** – Due to the 2 Factor Authentication process, the Log out option here is disabled. To log out of TED, close the browser window. About TED option displays the current version.



4. **Blue Navigation bar** – Click each option and the home menu will change based on your selections. Your options are based on your access.



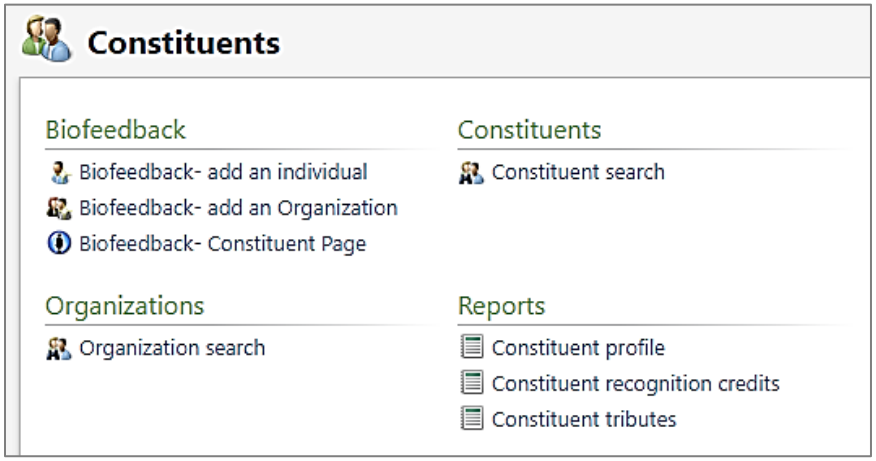
5. **Message Center** – Watch for TED related events on the Calendar, take a look at important announcements and the latest UIF Advancement Insider in News & Updates, and easily access other advancement related tools in the Useful Links section. Entire Calendar option shows a list of all TED related events. Click Entire List to search for archived News & Updates.



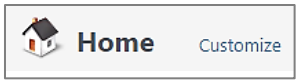
6. **Main display area** – Below is an example of the constituent menu in the main display area.

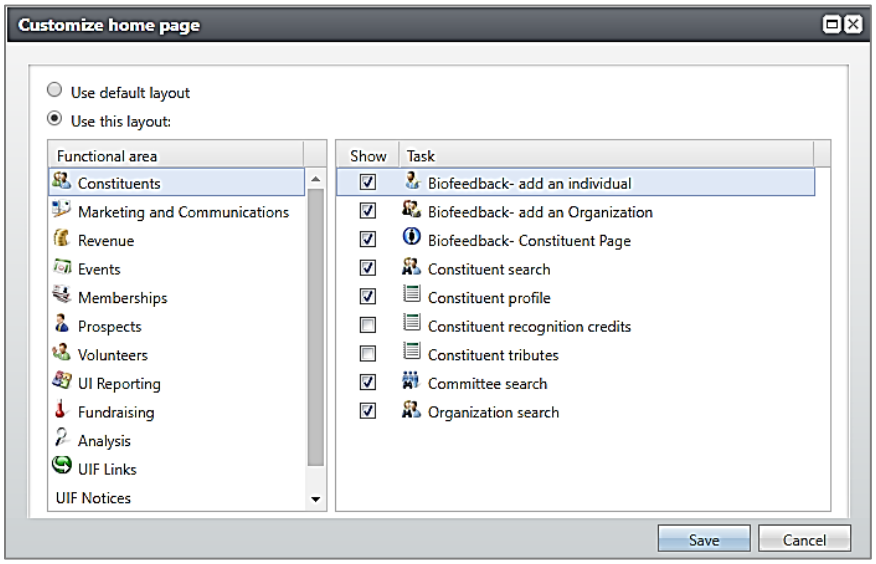
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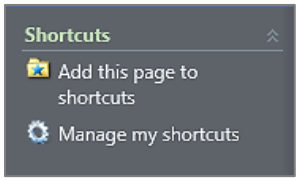


7. **Customize** – This option allows you to include or hide functions (based on access) on your home page.





8. **Shortcuts** – Add the areas that you use most often for quick access.

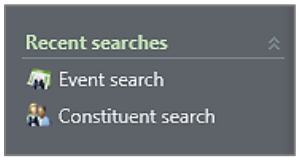




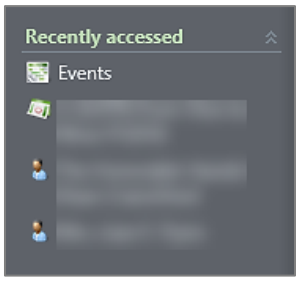
Hover over a function to add it to the shortcut area.

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9. **Recent Searches** – Displays the last 5 areas you searched in TED. Yours will vary according to your own recent searches.



10. **Recently Accessed** – Displays the last 10 records you navigated to in TED. This is convenient to get back to recent records you used.



REVIEWED 7/26/24

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HOW TO CUSTOMIZE TED

SETTING OPTIONS THAT WORK FOR YOU

TED is a highly customizable system and can be set to your individual preferences. Setting up your TED workspace based on tasks you do and how you work can be a timesaver and can make TED easier to use. Customizations are stored when you log out and can be changed as often as you like.

Custom Options

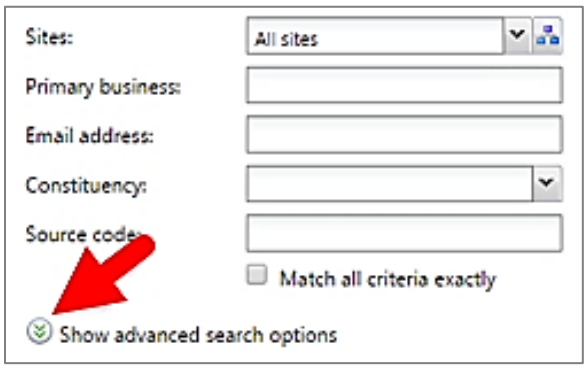
These are areas of TED that users can customize:

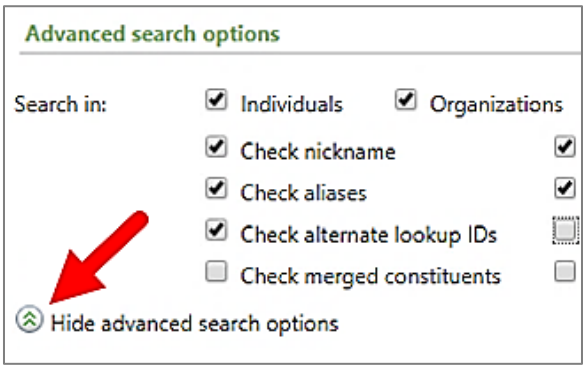
- Advanced Search Options
- Columns – Arrangement Options
- Columns – Field Display Options
- Columns – Filter Options
- Columns – Sorting Options
- Filters
- Home Page – Customize
- Shortcuts
- Summary Tiles
- Tabs & Sub-tabs Arrangement

Advanced Search Options

When using the Constituent search, altering the default search options will help you find records faster. Select the **Show advanced search options** to display the options shown below. Select **Hide advanced search options** to close that window.

Important Note: The constituent search window is available in multiple locations in TED. Advanced options you set are applicable only on the specific search window you have open.





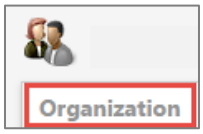
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Individuals – This option will return constituent records with a type of Individual. Records are designated with a type of *Individual* and this graphic.



Organizations – This option will return constituent records with a type of Organization.
Records are designated with a type of *Organization* and this graphic.



Groups/Households – This option will return constituent records with a type of Group or Household. Group records are also known as *Committees*.

Committee records are designated with a type of *Group* and this graphic.



Household records are designated with this graphic.



Check nickname – Checking this option (recommended) and entering a nickname in the first name field locates constituents with names populated in the Nickname field on the Personal Info, Personal tab.

For example: An alum named Robert John Jones goes by John. Storing John in the nickname field and using the nickname advanced search option will help you easily locate the record.

Only search primary addresses – Checking this option (recommended) will limit duplicate records displayed. Each constituent in TED has only one primary address designated. If the option is left unchecked, results include every address (even those with an end date) for the constituent being searching for. This results in multiple entries like shown here:

Results (3 records found)

Lookup ID	Name	Constituent type	Address	City	State
11319393	Vacketta, Carl L.	Individual	1001 New Hampshire Ave NW	Washington	District of Columbia
11319393	Vacketta, Carl L.	Individual	2555 Pennsylvania Ave NW Apt 904	Washington	District of Columbia

Note**:** If a constituent record does not have a primary address designated, they will not appear in the search results if this option is used. A process runs each night to designate a primary, so these records should be minimal.

Check aliases – Check to include aliases from the Personal Info tab, Personal sub-tab of constituent record.

Include deceased – Check to include deceased constituent records.

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Check alternate lookup IDs – Check to include alternate lookup IDs if one is on the constituent's record. Examples of common alternate lookup IDs are UIN, UIAN, FACTSID, and Paciolan.

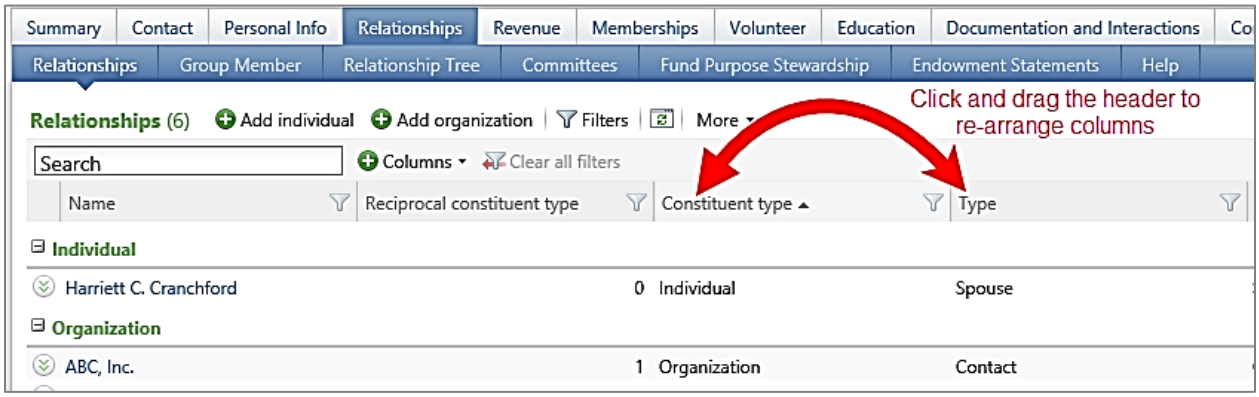
Include inactive – Always leave unchecked.

Check merged constituents – Check to include constituents merged from a duplicate constituent.

Include fuzzy search on name – Check to return constituents with name that sound like the search criteria entered. For example, enter a name of "Smith" constituents with a name of "Smyth" return in the results. Because a maximum of 100 results are returned, this is only recommended after searching using other information available on the constituent.

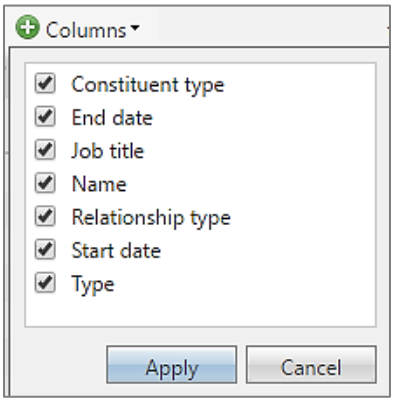
Columns – Arrangement Options

Some tables in TED allow columns to be re-ordered. If you can click and drag a column, this means you can rearrange the columns to an order of your preference.



Columns – Field Display Options

Some tabs allow you to display columns by checking the field names such as this example on the Relationships tab. Click Apply after making your selection.



Tabs with this option are:

- Grant and contracts history
- Members (on Group records)
- Relationships
- Documentation and Interactions
- Fundraiser
- My Fundraiser Page

Columns – Filter Options

Some tables in TED can be filtered. This option is available if you see small Funnel Icons for the filters.

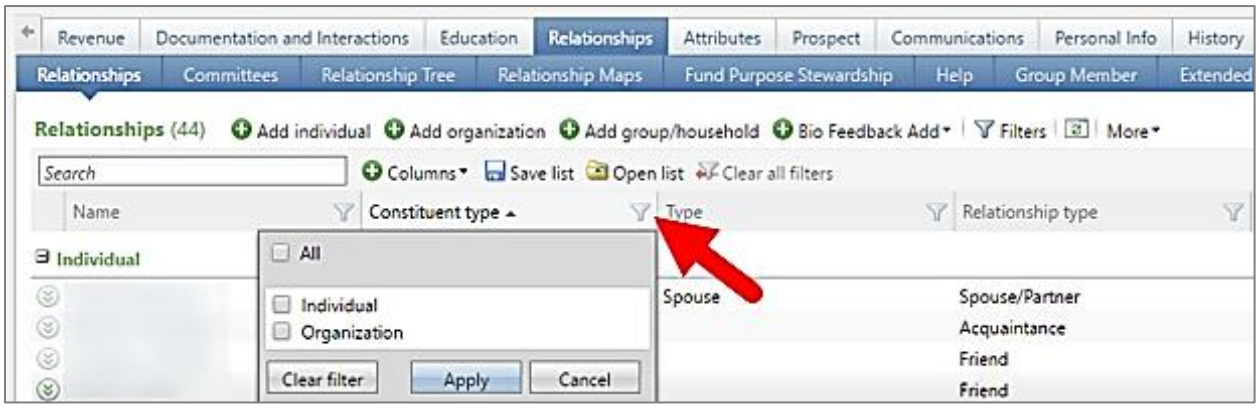
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Each filter has options related to the specific column or area. Some filters toggle displaying current and former information.

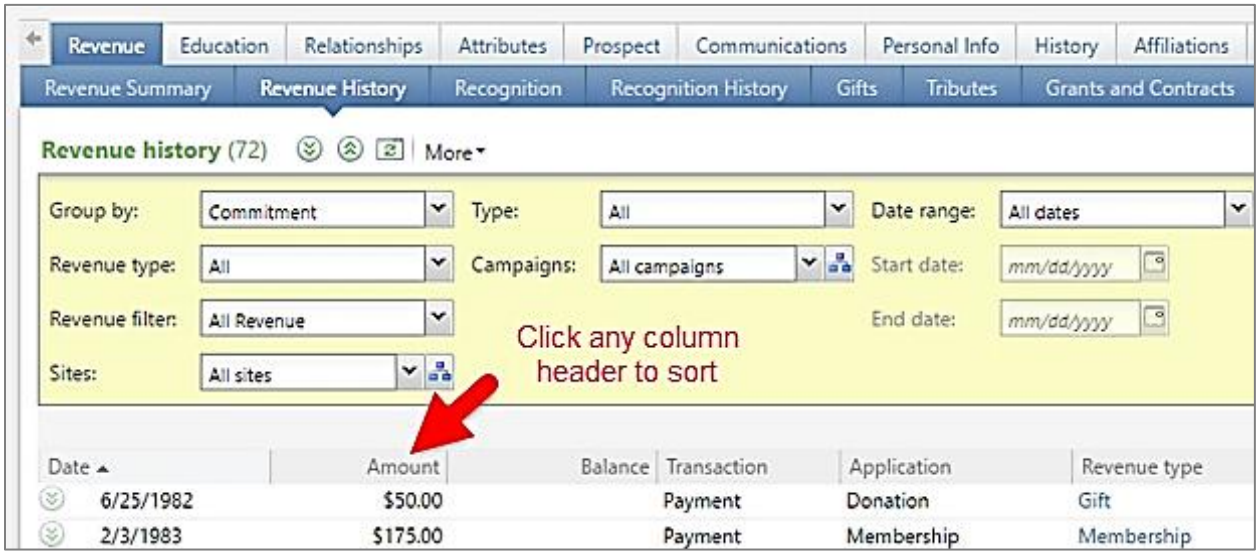


Filters allow you to decide what information to display based on the data contained in that field. Click **Apply** after making your selection. Be sure to **Clear Filters** when you're done or the filters will continue even when on other records.



Columns – Sorting Options

Any table (aka grid or spreadsheet) within TED can be sorted by clicking on the table column header. This allows you to analyze data by sorting it in various ways.



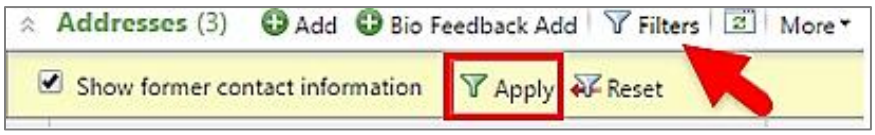
Note**:** You may also want to sort your table before you download it using the **More** button so it is sorted in your download.

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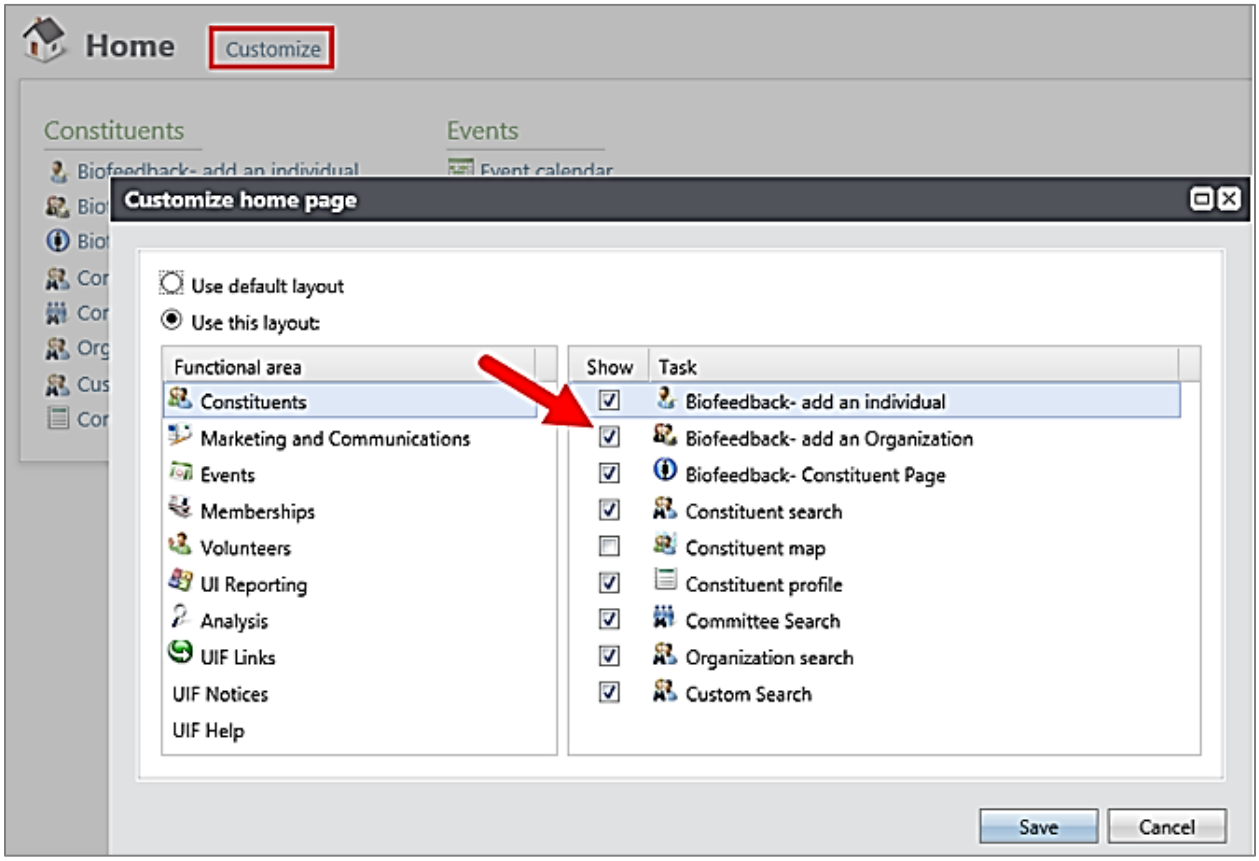
Filters

Filters are available throughout constituent tabs and sub-tabs that control various options. This option on the contact tab allows display of active or inactive data. Click **Apply** after making your selection.



Home Page – Customize

Choose which features to display on your personal homepage in TED. Click the **Customize** link on the home page, check the options to display then save your selections.

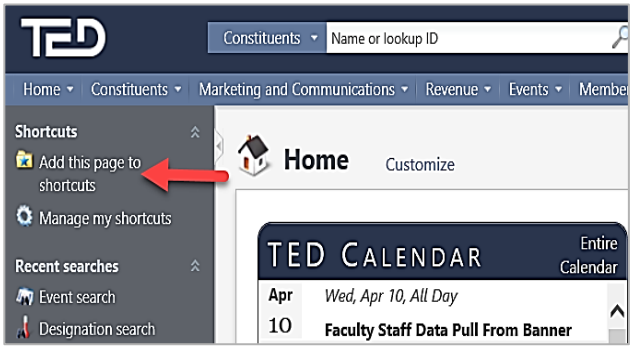


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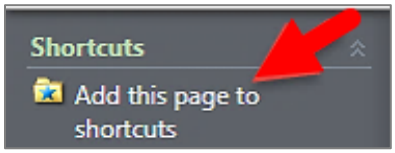
Shortcuts

Add any page within TED to your shortcuts menu. To do this, navigate to the page you want and then click **Add this page to shortcuts** in the Explorer Bar on the far left of the screen. Shortcuts are saved when you log out of TED.



Hover over a function to add it to the shortcut area.





Pages or even constituent records can be added to your shortcuts. While on the page or record that you'd like to add, choose the Add this page to shortcuts.

To delete or change the order of your shortcuts, choose the **Manage my shortcuts** option. Click on the double arrows next to the shortcut to display additional options. Constituent records can also be added to your shortcuts.



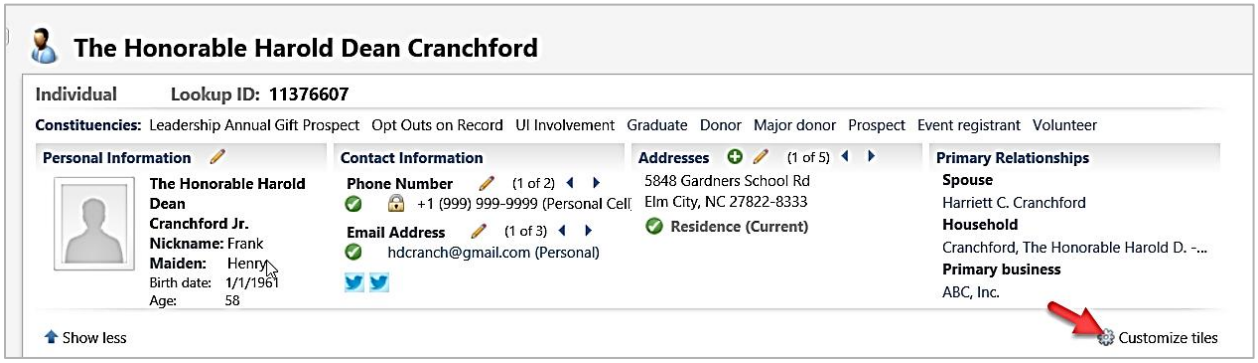
Summary Tiles

Summary tiles displayed on constituent records can be turned on and off by selecting the **Customize tiles** option.

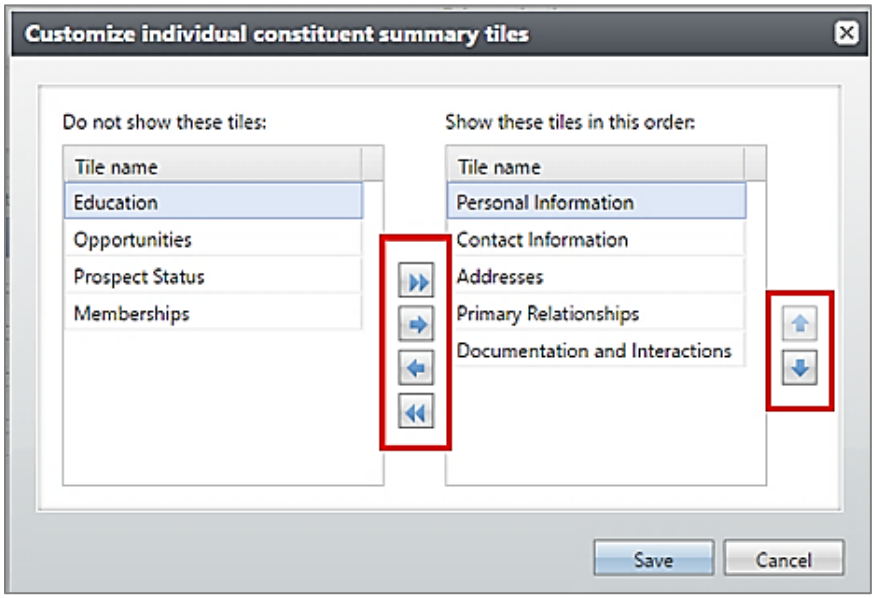
In this example, the summary tiles displayed are Personal Information, Contact Information, Addresses, and Primary Relationships.

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Click the arrows to show or not show each summary tile. The arrows on the right allow you to choose the order your selections are shown on the constituent record.



Tabs & Sub-Tabs Arrangement

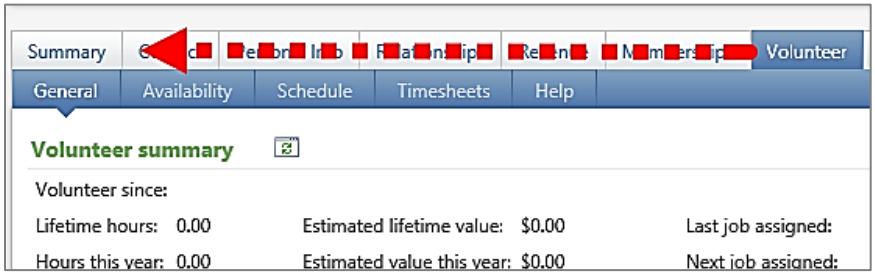
Tabs and sub-tabs in TED can easily be rearranged based on the tasks you are working on. The tab in the furthest left position will be the default that displays when you open a constituent's record.

For example, you may want to click and drag the **Volunteer** tab all the way to the left. This will make this tab open automatically when you open a constituent record. You may also arrange the sub-tabs to automatically open the sub-tab you want, such as **Schedule**. Click and drag it all the way to the left.

Your tab and sub-tab arrangement will be saved each time you arrange them and can be easily changed.

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Note: Tabs and sub-tabs can change back to default positions after TED system releases.

REVIEWED 7/29/24

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UIF FILE SHARING

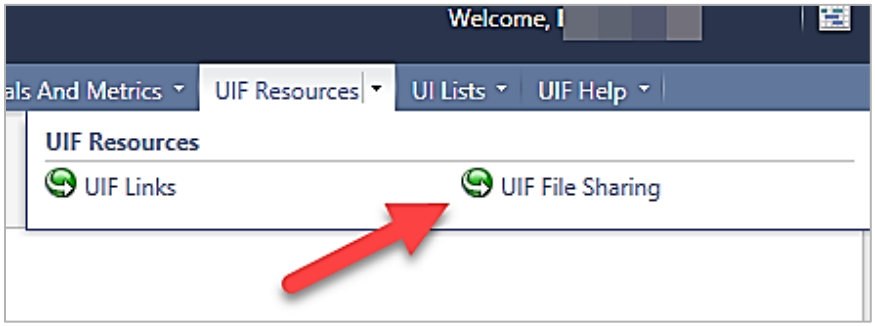
A DOCUMENT SHARING TOOL WITHIN TED

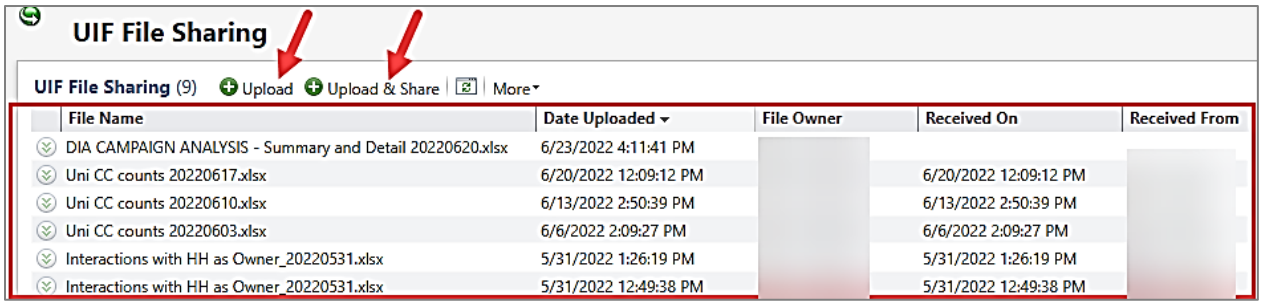
UIF File Sharing is a tool within TED that allows the retrieval of documents specifically loaded for you by the University of Illinois Foundation staff. Additionally, you can upload your own documents to share securely with other colleagues that utilize UIF systems.

Navigating the Tool

To get to UIF File Sharing, login to TED (https://ted.uif.uillinois.edu) and select UIF File Sharing from the UIF Resources functional area tab.

*Note: If you are **not** logged into TED and you click the link within the email: It will take you to the main screen of TED. However, if you **are** logged into TED and you click the link within the email: It will go directly to your file that was shared.*





File Repository – the area inside the red box (shown above) is your File Repository. It contains all of the files that you have uploaded or that have been sent to you

- File Name –the name of the uploaded file
- Date Uploaded –the date the file was originally uploaded into UIF File Sharing
- File Owner – the owner of the file. Each individual can only see his/her own files

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- Received On – the date/time that a file was shared from another colleague.
- Received From – the name of the colleague that shared the file

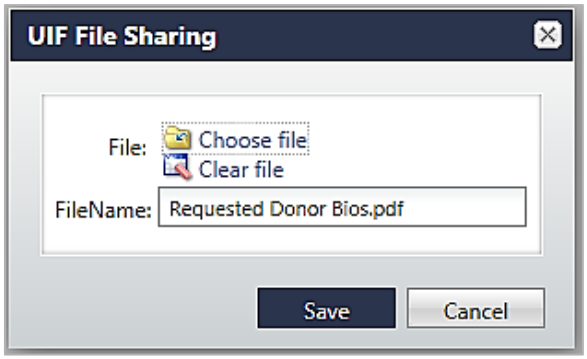
Upload – allows a new file to be uploaded to your repository
Upload & Share - allows you to upload a new file and send it to one or more colleagues in a single step

Refresh - refresh the list of files in the File Repository by clicking on the  icon
More - allows you to download the list of files (not the contents of the files – just a list) or resize the columns. The File Repository can be sorted by clicking on any of the column headings.

Upload

To upload a new file to the File Repository, select the **Upload** button. The following dialog box will open.

Select 'Choose File' to open Windows Explorer to select a file. Once selected, the name will appear in the 'FileName' box. Select 'Save' to add it to your File Repository.



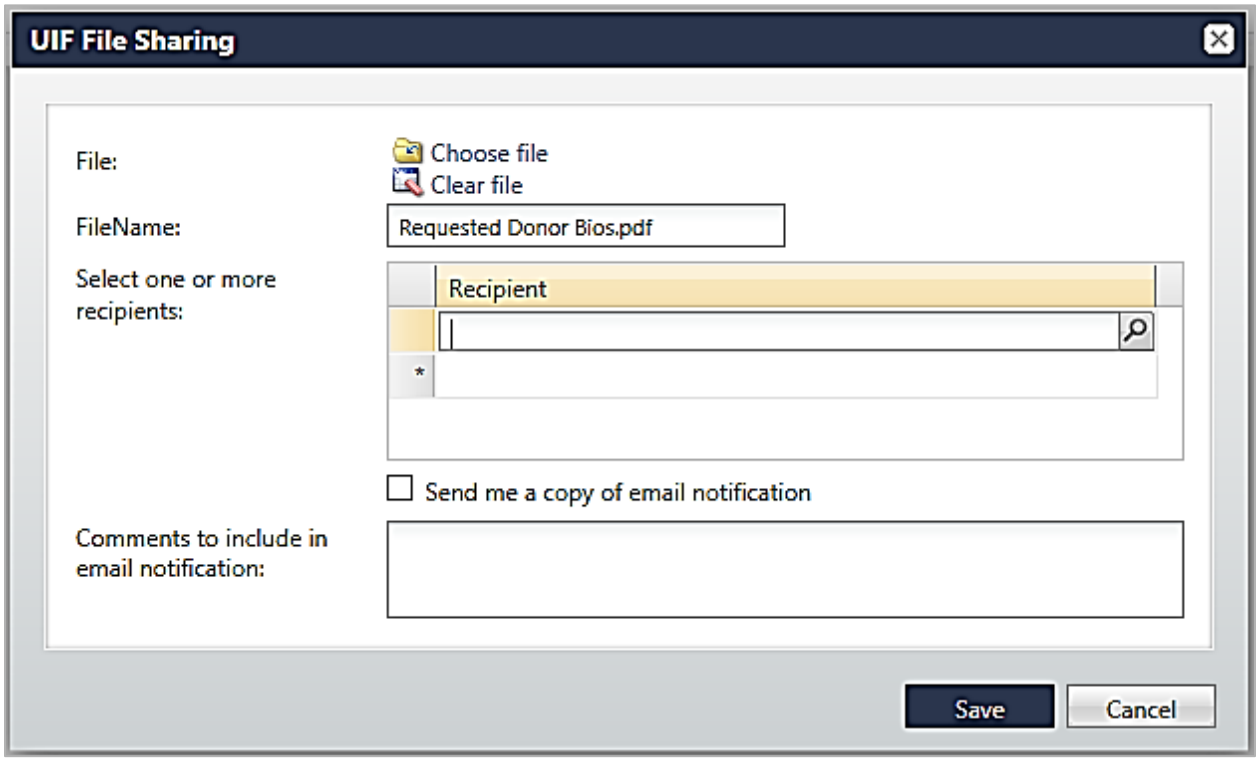
Upload & Share

The 'Upload & Share' button will allow you to upload a new file and share it with one or more colleagues in a single dialog box.

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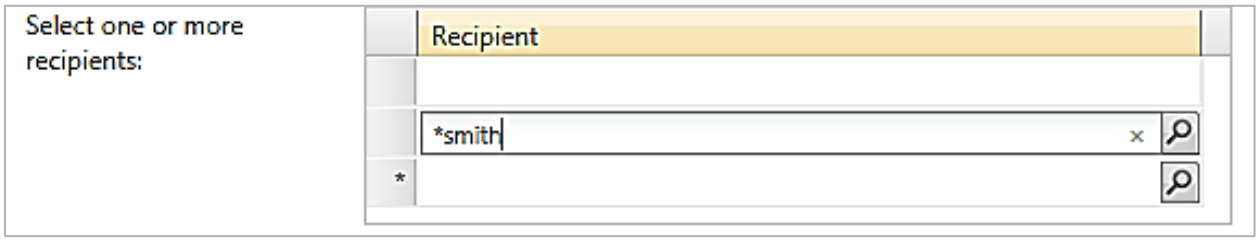
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It has the same 'Choose File' feature as the 'Upload' dialog box. Use it to select a file. In the Recipients Grid typing in a name or selecting the magnifying glass icon will open up a search dialog box.



When typing in a name directly, it is suggested that you start the name with the '*' wildcard character so that it can find all matches. Additionally you can search for lastname, first name or *username (username is a person's netid).

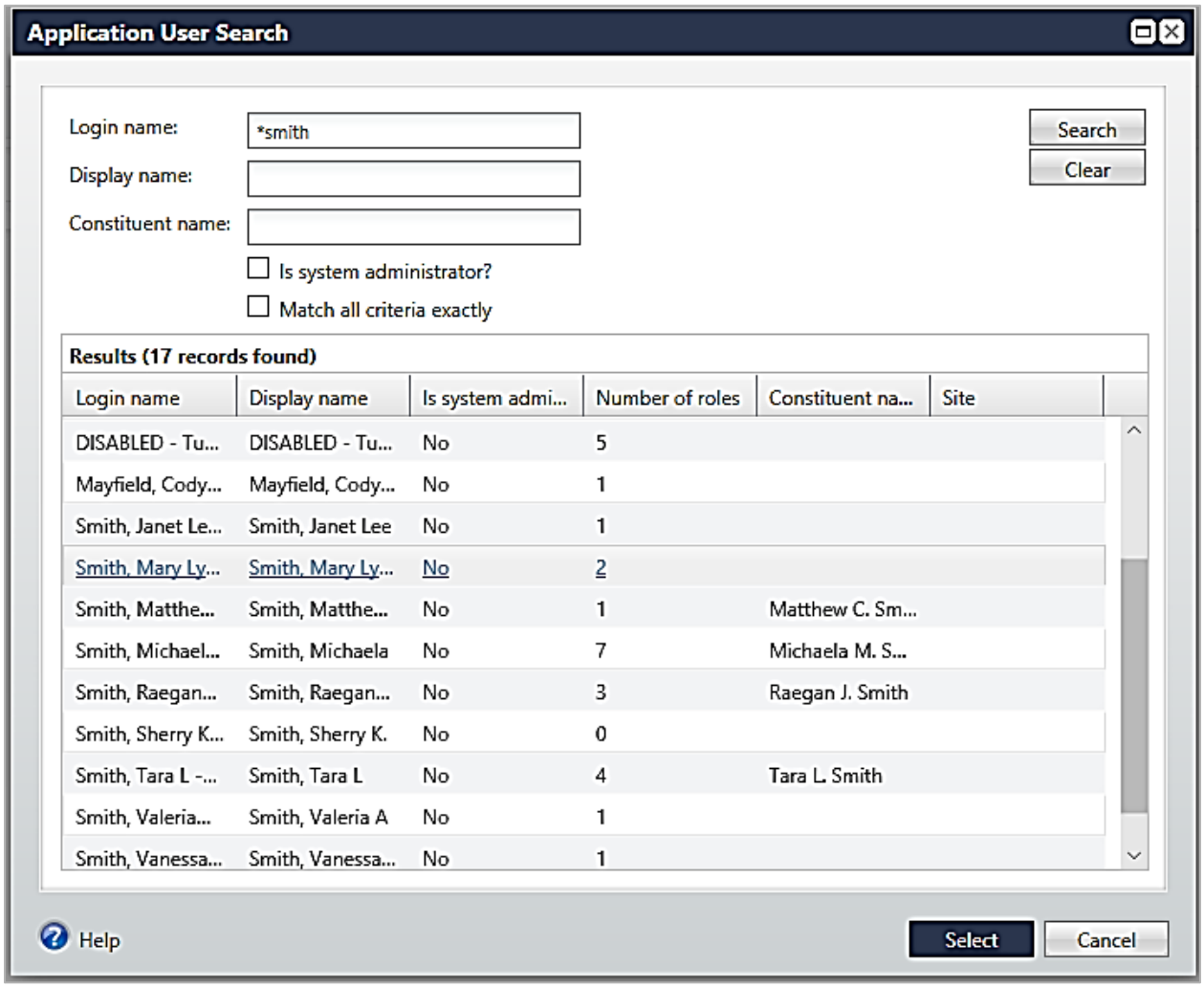
Clicking enter will produce a list of all names that match the entered information



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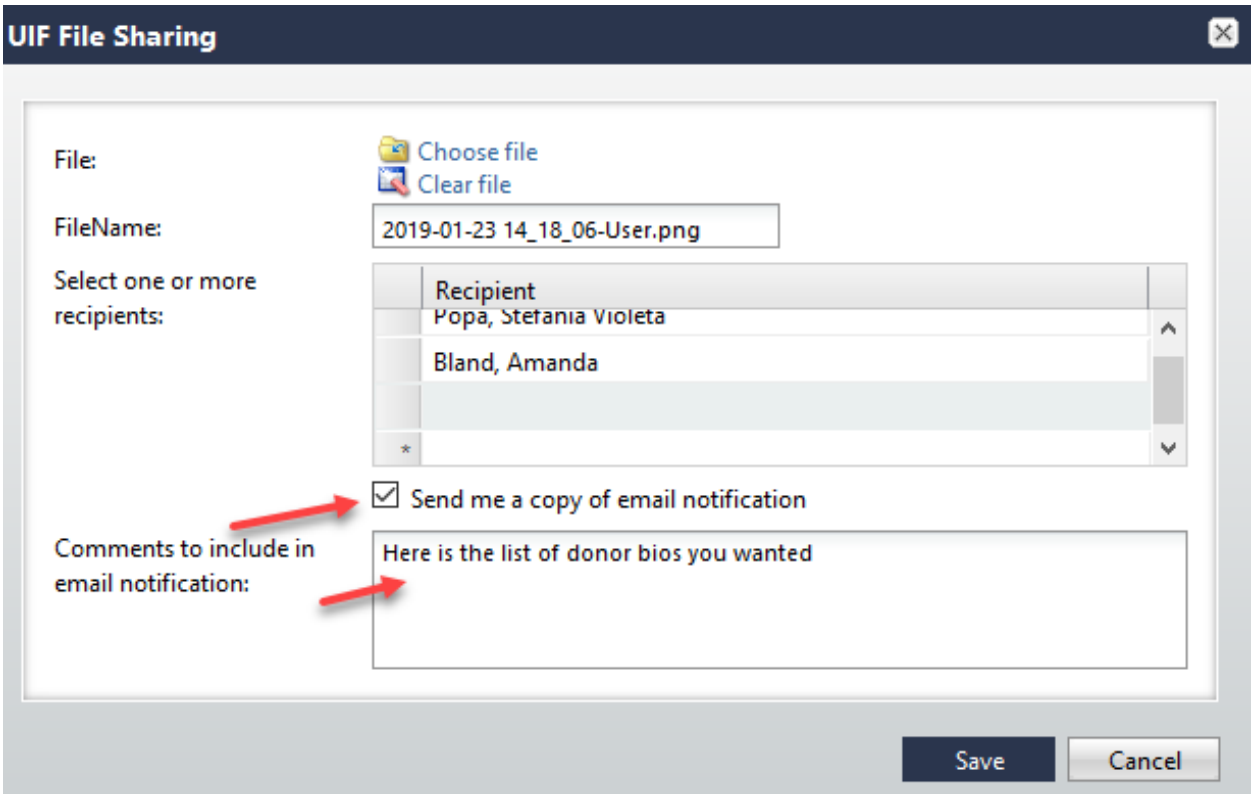
A specific recipient can be selected from the list and the process can be repeated if more recipients need to be added.



Once the recipients have been selected, a comment can be added to be included in the email. There is also the option to send yourself a copy of the email notification.

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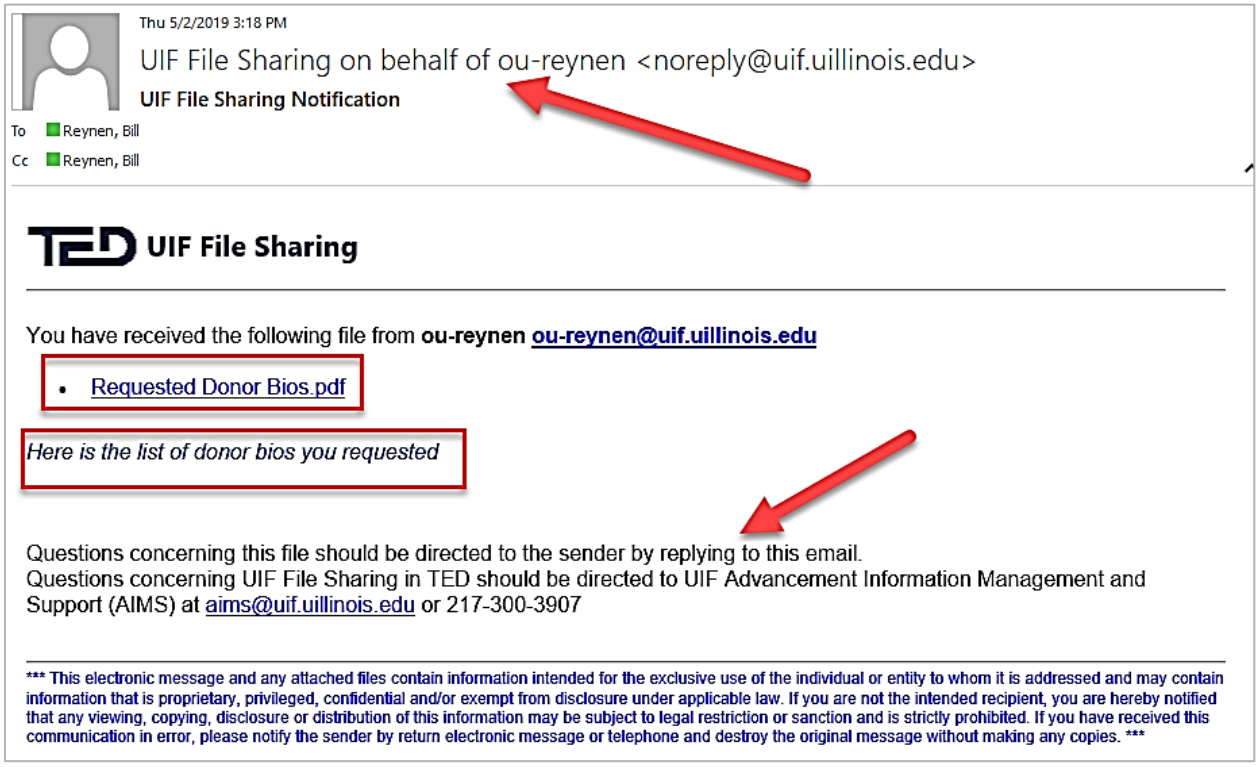
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Email Notifications

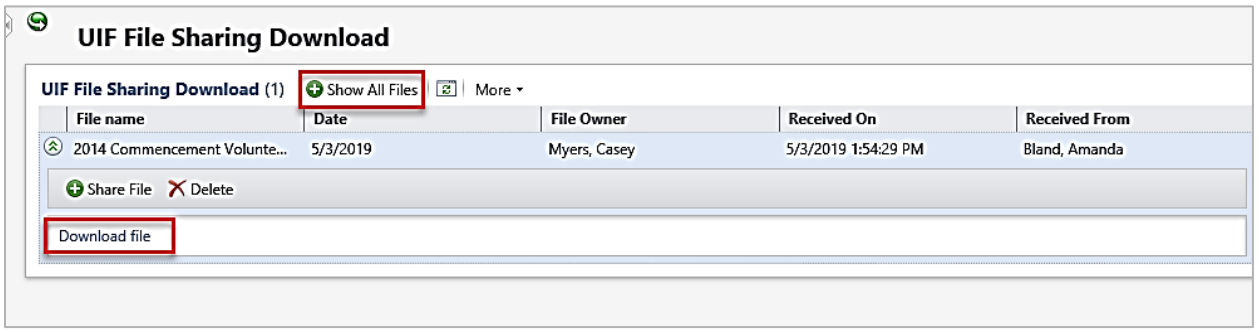
The recipient will receive an email notification when a file is sent to them like the one below. It will contain a clickable link to the file that was sent to them as well as any comments entered by the sender.

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Notice that the email is 'from **UIF File Sharing** but it was sent on behalf of the sender. If the recipient replies to this email, the reply will be sent directly to the sender.

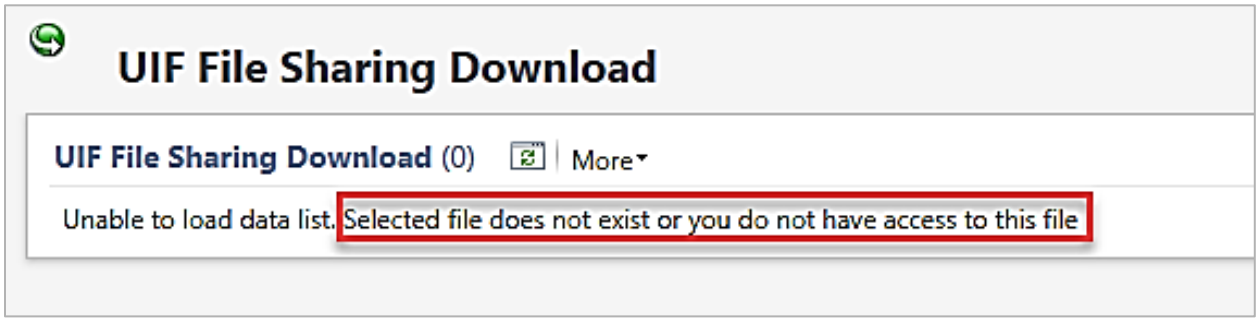
When clicking on the filename, it will open TED and then display the following page where the file can be viewed. Clicking the chevron button on the left of the filename displays the option to share or delete the file. From this screen select **Show All Files** to get back to the full File Repository.



Note: this link is only valid for the recipient. If the email is forwarded to someone else the link will not work and will display the following message. The links will also not work in emails that are copies you

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receive sent via the 'Send me a copy of email notification'. In these cases, you will receive the following error.

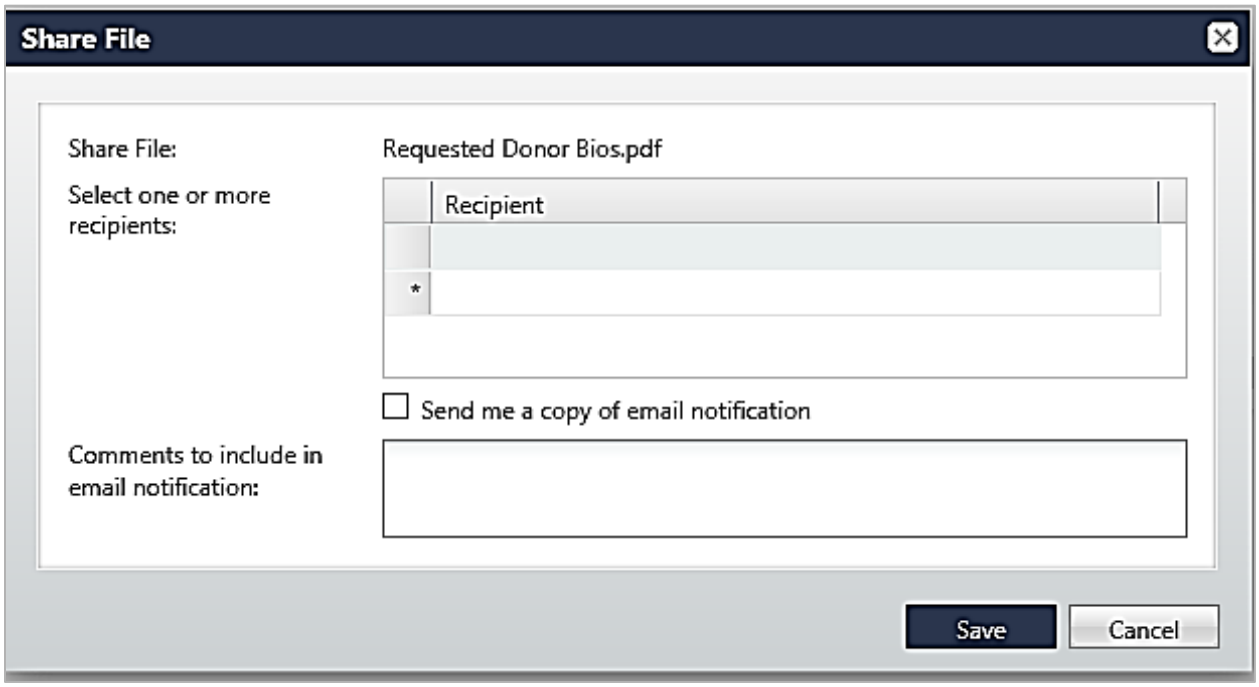


Managing files in the File Repository

There are three actions that can be performed with each file in the repository; Share, Delete and Download. These actions can be performed by first clicking the chevron to the left of the filename.

Share File

Similar to the **Upload & Share** option, this will share a file already in your repository with one or more colleagues.

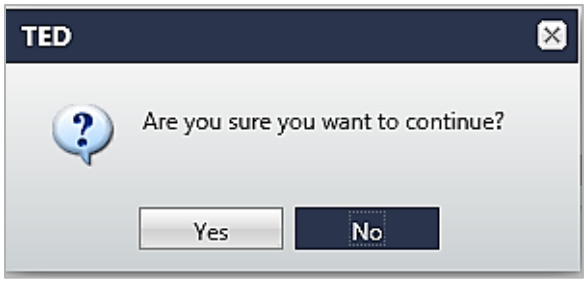


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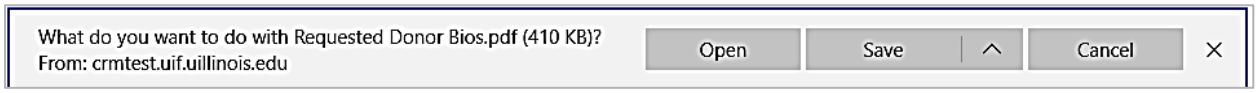
Delete File

Allows a file to be deleted from the repository. A warning will be given within a dialog box before the file is deleted. This process is irreversible and once deleted it can NOT be recovered.



Download a File

Allows a file to be downloaded and/or viewed. Depending on the web browser used, a dialog box will appear as below:



Allowed File Types

Only the following File Types can be uploaded to UIF File Sharing:

- bmp
- csv
- doc
- docx
- jpg
- log
- mht
- pdf
- png
- ppt
- pptx
- rtf
- tif
- txt
- xls
- xlsx
- zip

REVIEWED 7/29/24

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UIF Support

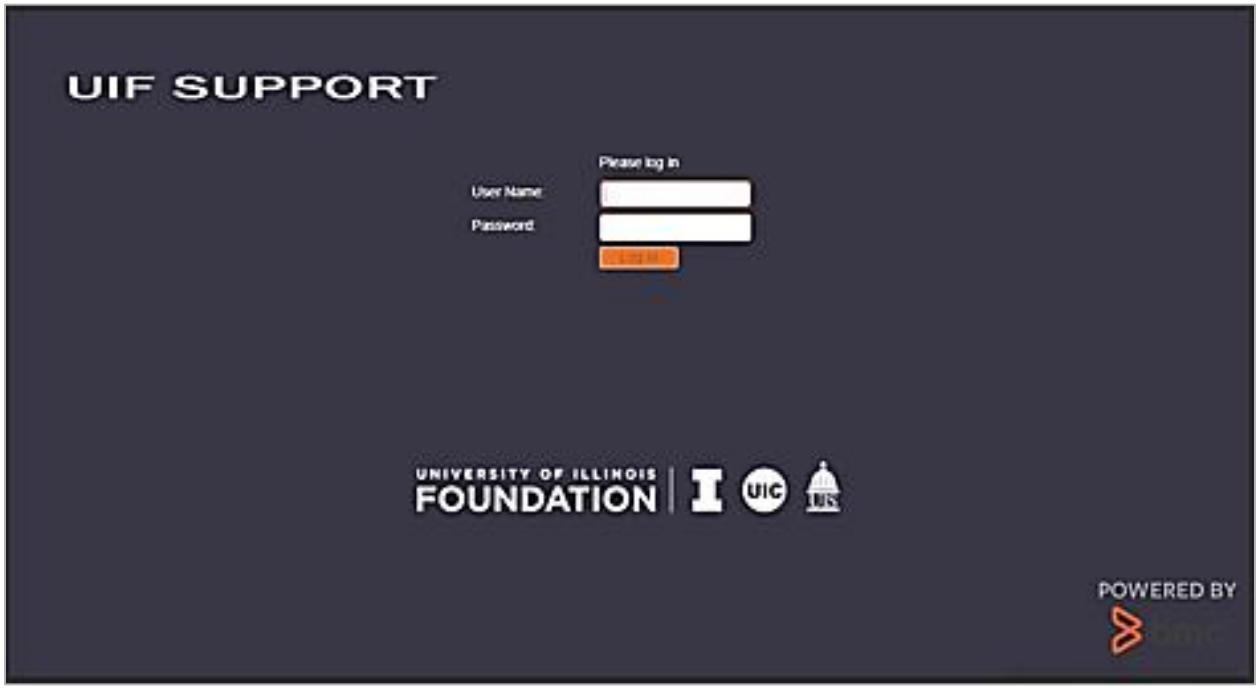
THE UIF TICKETING SYSTEM FOR TRACKING REQUESTS

UIF Support is the UIF ticketing system used to submit, view, and edit help requests. The information provided in the tickets is used to assign each ticket to the appropriate staff so it can be completed in a timely manner. UIF Support manages the staff assignment, tracking, and workflow of tickets.

Accessing UIF Support

NOTE: Google Chrome is the preferred browser to use with UIF Support. Using another browser may result in display variations.

- Use the following link to access UIF Support https://support.uif.uillinois.edu
- Log in using your NetID and Password.

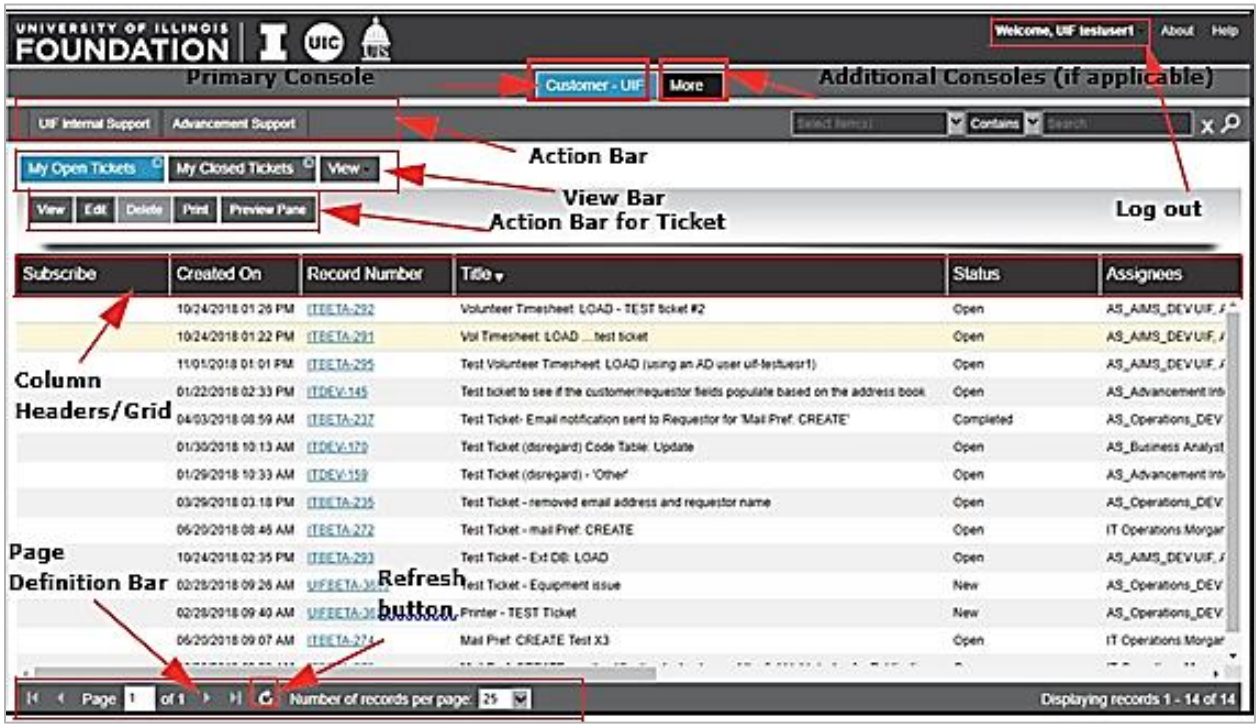


Understanding the Console Screen

The default screen contains the primary and additional consoles (if applicable), the Action Bar, View/Search Bar, Action Bar for the Ticket, Column Header/Grid, Page Definition Bar and the Log Out selection drop - down. The Portal screen defaults to the primary console with only your open tickets displayed.

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Sample of a UIF Support "Primary" Console Screen



- The Action Bar allows you to create an Advancement Support and UIF Internal Support ticket.
- The View/Search Bar provides a customized list of records submitted and includes the 'My Open Tickets' and 'My Closed Tickets' tabs. 'My Open Tickets' will show you tickets you have submitted that are still open and assigned to a technician. 'My Closed Tickets' will show you tickets you have submitted that have been cared for and are now closed.
- The Action Bar for Ticket allows you to view/print/edit/preview your submitted tickets.
- The Column Headers/Grid displays a list of your submitted tickets including information such as Record Number (Ticket Number), Title (Short Description), and Last Name (Requestor). The grid may be customized to display in a different order. For more information, see "Customizing/Filtering Column Headers/Grid" on page 2.
- The Page Definitions Bar gives you the ability to define the number of items to display on a page (e.g., 100), jump to a specific page, and refresh the page.
- The Log out drop down allows you to log out of your UIF Support session.

NOTE: All inactive users will be logged out after 45 minutes of inactivity, and you will lose any unsaved changes. Editing/creating a new ticket is not considered as being active in the session, so you will need to save the ticket details often and then edit the ticket to add additional information as needed.

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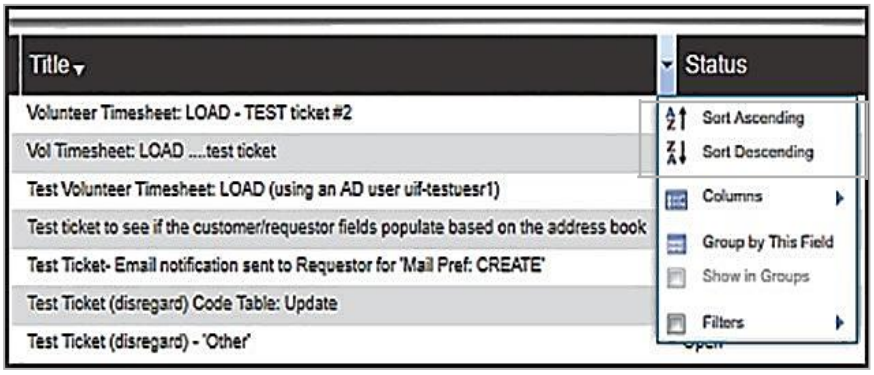
Customizing/Filtering Column Headers/Grid

The console screen Column Headers/Grid may be customized to display tickets by a specific field, in a specific order, or to display only specific fields within the list by hovering over the column heading and then click the drop-down arrow.

Sorting Tickets/Requests by Ascending/Descending Order

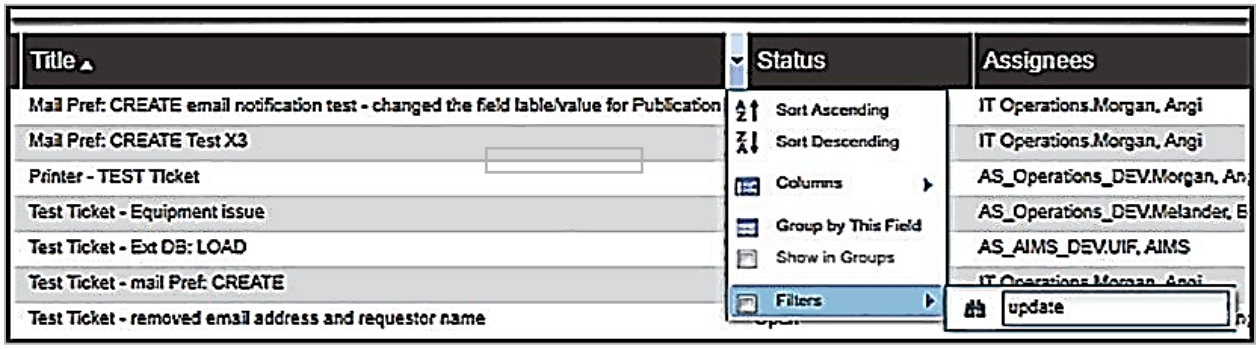
Do one of the following to sort the tickets/requests within the list:

- Click the column heading to sort the grid by that column in ascending order.
- Click the column heading again to sort the grid by that column in descending order.
- Hover over the column heading, click the arrow, and select Sort Ascending or Sort Descending.



Filtering Results

A list may be filtered by hovering over any column heading and clicking the arrow in that heading and typing the filter value in the Filter field. Filtering results produces a smaller list of results for tickets of a specific type or may also produce a different group of results. If a current search displays open tickets, it may be filtered to display only open tickets with a high priority, which will produce a list of open tickets with a high priority. Filter settings are saved until another filter is applied and are retained even when you log out of your UIF Support session.



***Example:**

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*If you want to filter the list to include tickets with 'Update' in the title, select the Title heading arrow, select **Filters**, and then type **update** in the search field to filter the list to include those tickets with 'Update' in the heading.*

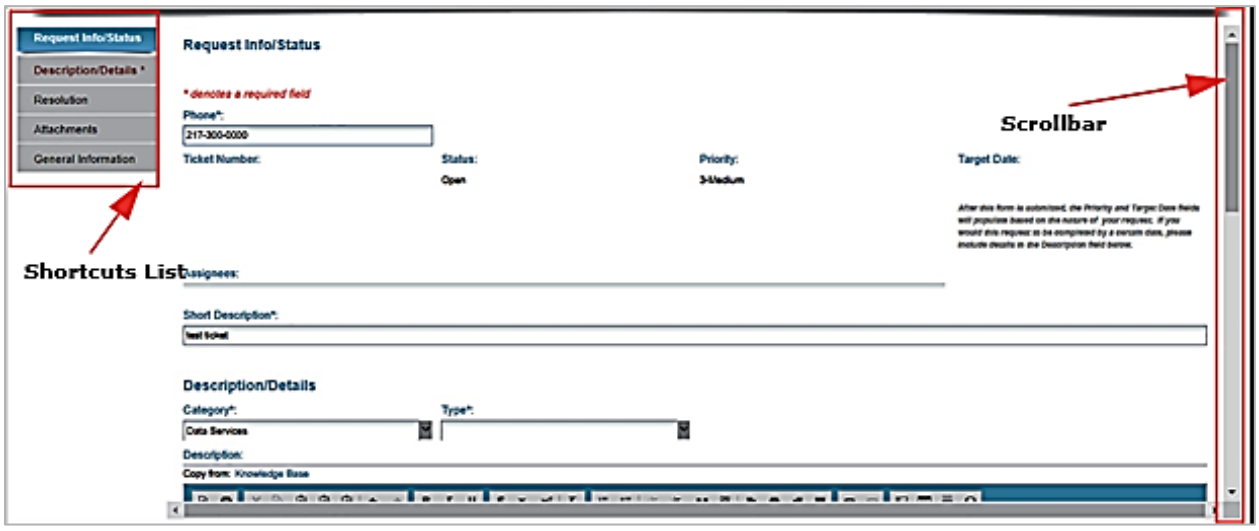
NOTE: If your filter properties conflict with the original search criteria, the filter may not return the desired results. For example, if you filter the status field for 'closed' tickets when you are searching in your My Open Tickets tab from the view/search bar, you will not get any results. Make sure to clear the filter to return to your original search.

Ticket Information

Tickets are separated into five sections that contain specific information: Request Info/Status, Description/Details, Resolution, Attachments, and General Information. These sections may be accessed using the Shortcuts List or the scrollbar.

Using Shortcuts

Shortcuts allow you to jump to the different ticket sections by clicking the shortcut in the Shortcuts List at the left of the ticket. Otherwise, using the scroll bar at the right of the ticket will let you scroll through to the different sections.

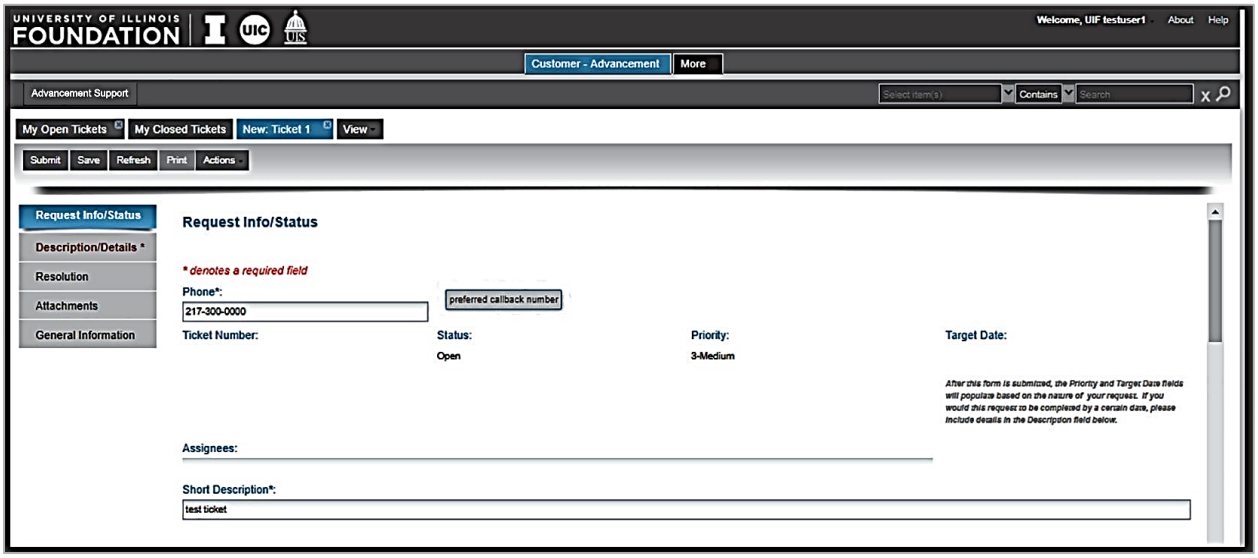


Ticket Sections

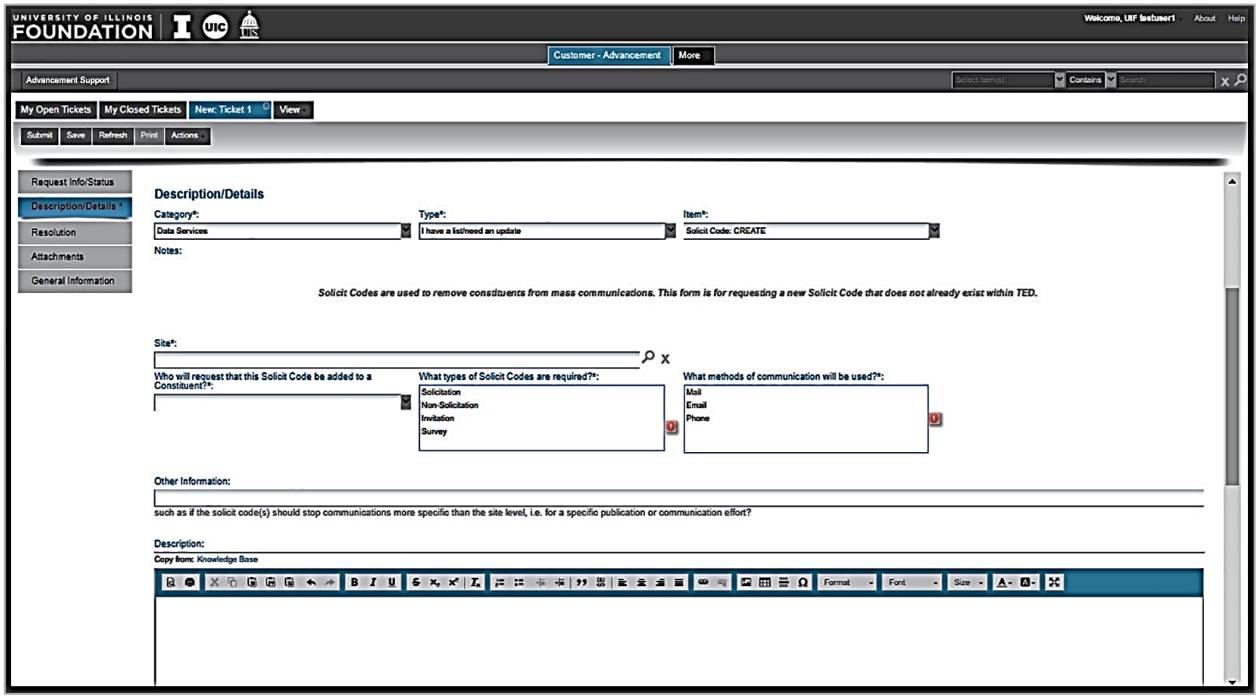
The **Request Info/Status** section includes Phone and Short Description fields. The Assignee and Priority fields are determined based on the details of the request. The Target Date is automatically calculated based on the priority assigned to the ticket. The Status is assigned automatically and updated by assignee as the ticket progresses to a closed status.

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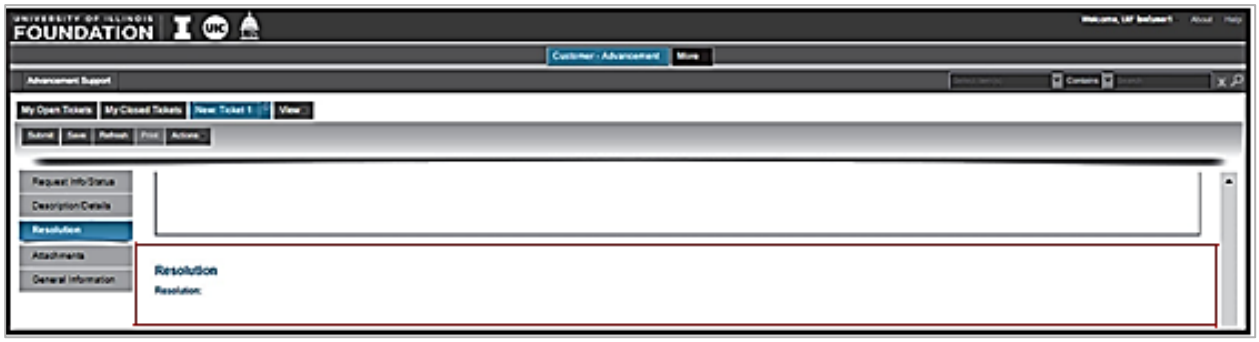


The **Description/Details** section includes the Category, Type and Item drop-down fields, which determine other fields displayed within this section of the ticket.

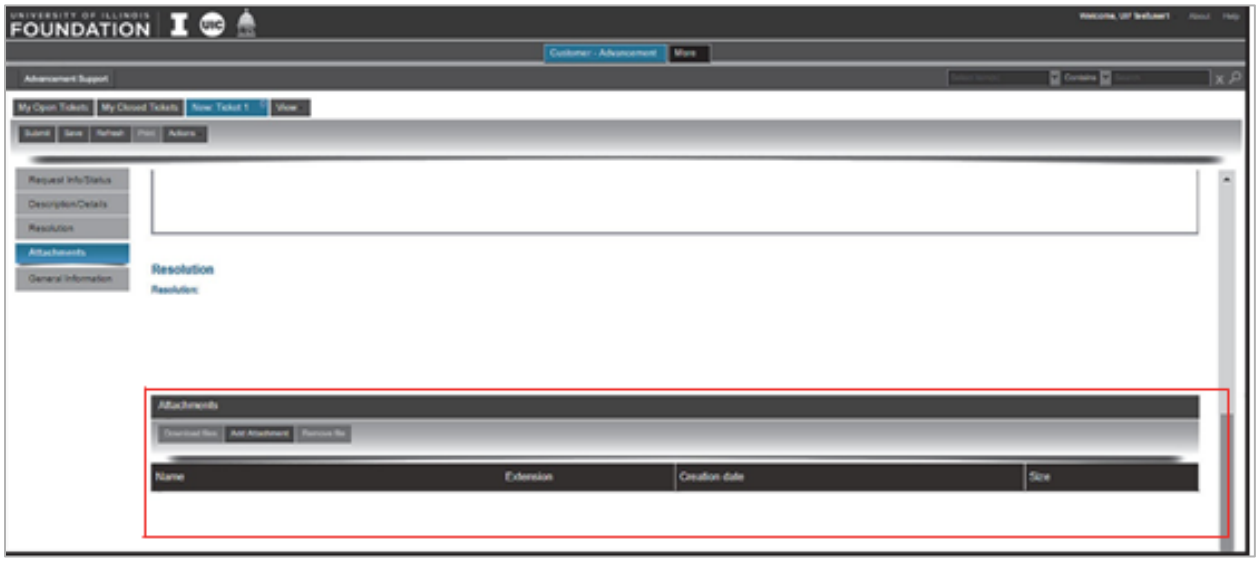


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The **Resolution** section is completed when the ticket status is changed to closed. It contains the tasks performed to resolve the ticket.

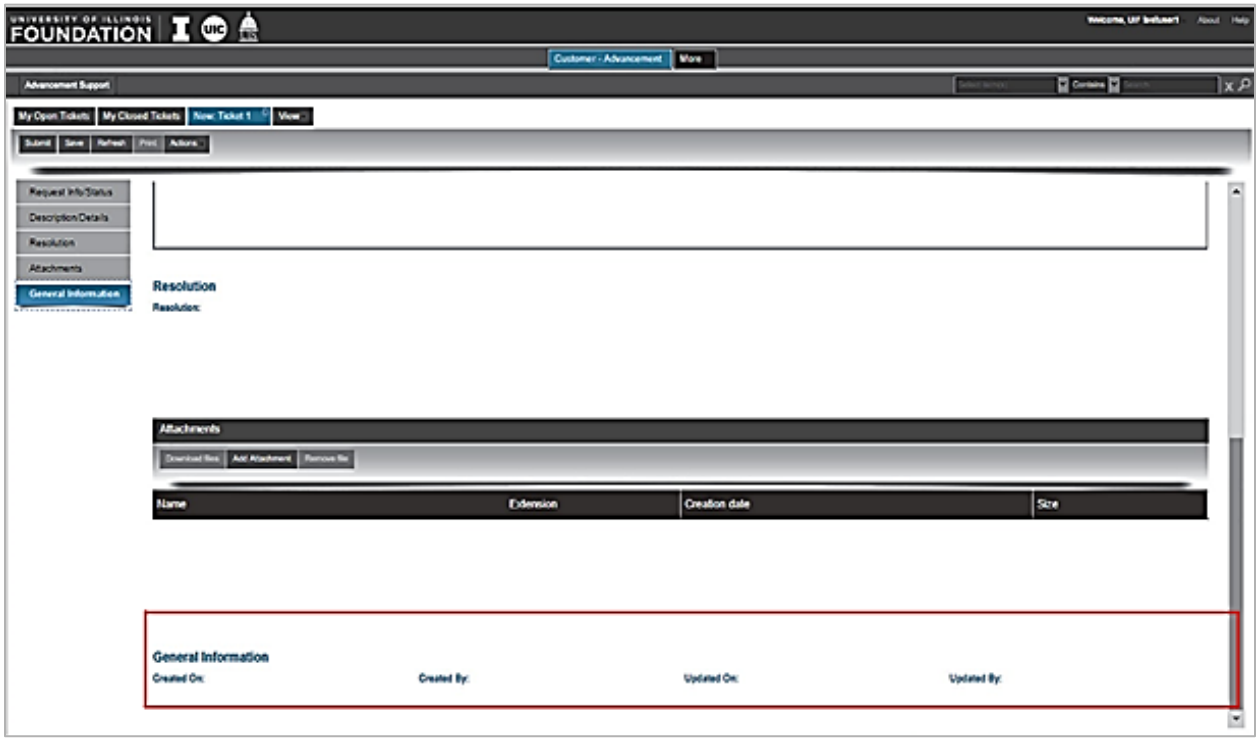


The **Attachments** section contains any attachments pertinent to the completion of a ticket (e.g., mail, document files, image capture).



The **General Information** section contains the view-only Created On, Created By, Updated On, and Updated by Information for the ticket.

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Understanding Ticket Fields

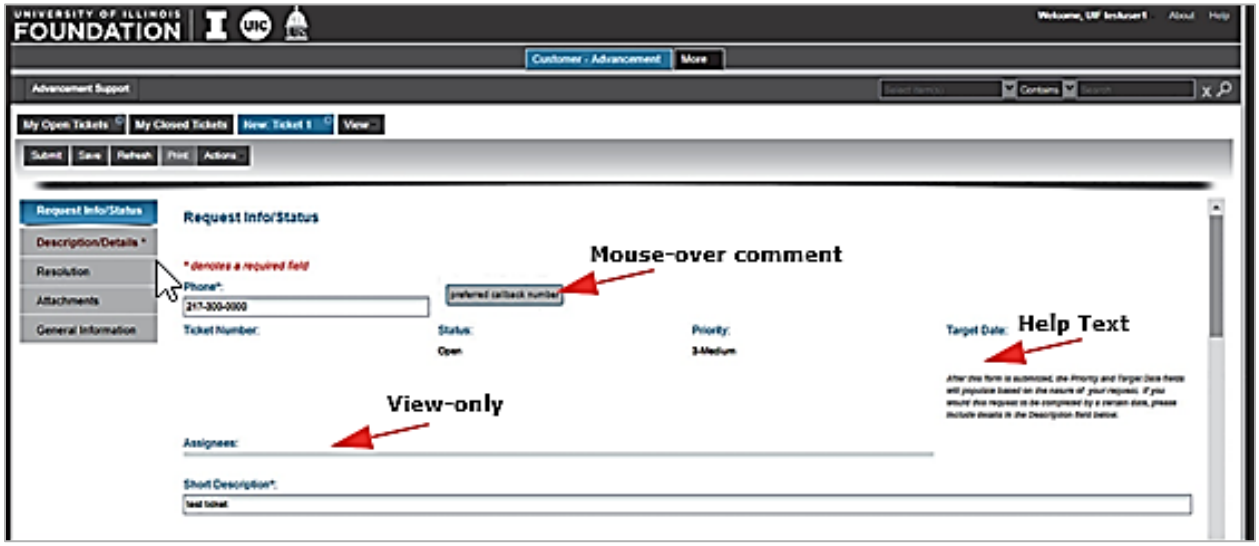
A ticket includes pre-defined, required, view-only, single-select, multi-select, search, and text fields as well as mouse-over comments and help text. Only fields that allow for text entry and drop-down selection may be completed.

Field Types

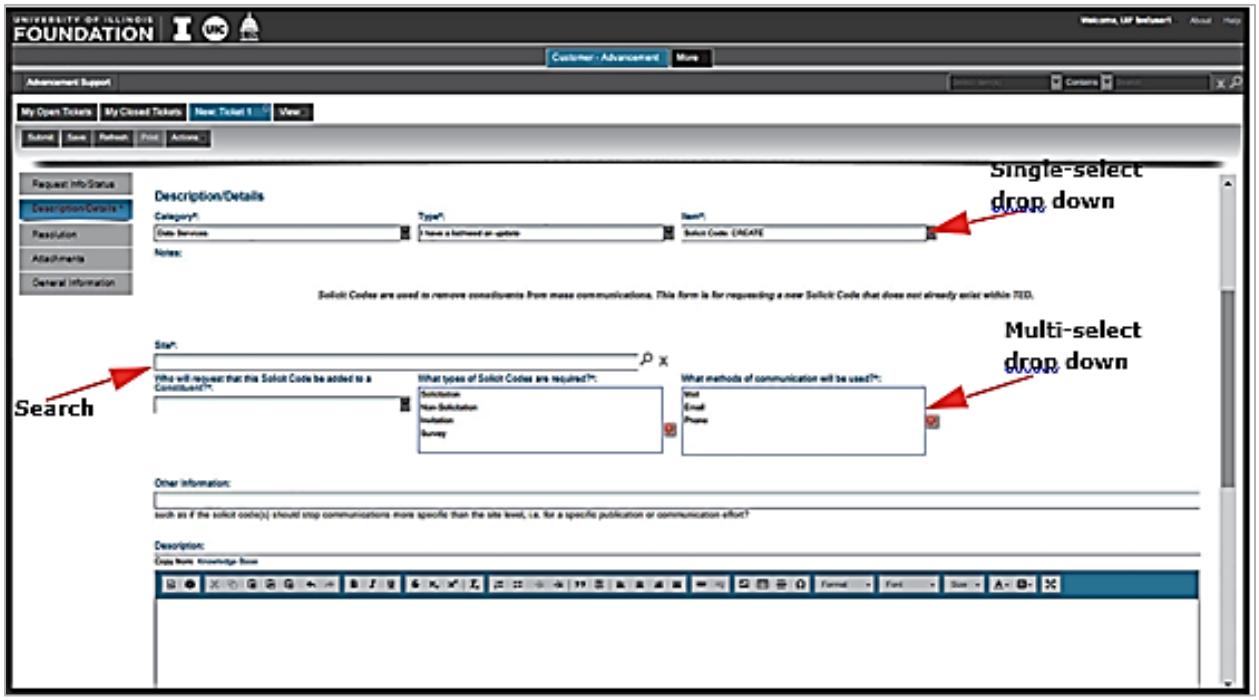
NOTE: Required fields are marked with an asterisk (*).

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Some fields include help text content displayed on the screen (e.g., Target Date) while other fields have additional information and field value definitions available when you hover your mouse over the field (e.g., Phone and Priority).



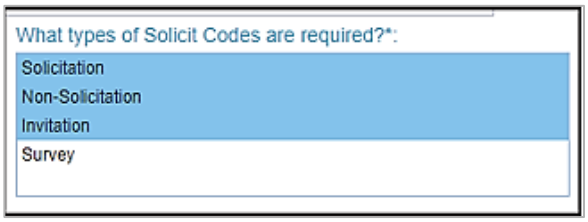
Fields may be single- or multi-selection, may provide additional links, be view only, or have searching capabilities.



Single – selection – If a field allows for single- selection, only one item from the list can be selected.

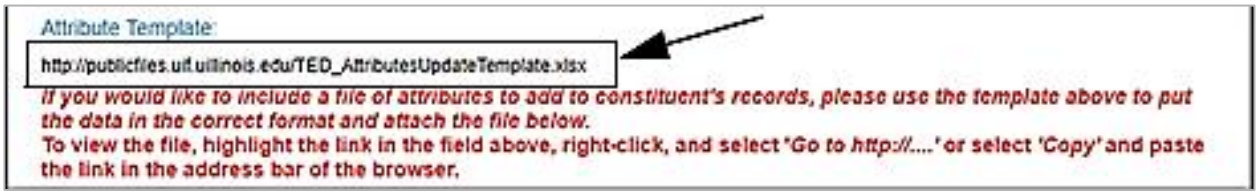
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Multi – selection – If a field allows for multi- selection, press **Ctrl,** and select each item from the list. All selected items will be highlighted as shown below.



*NOTE: Pressing **CTRL** to de-select any selected item from the list will remove the highlight on that item.*

Links- Some fields contain links for selection (e.g., templates), with instructions on what the link contains and how to use the link, as shown on the screen below.



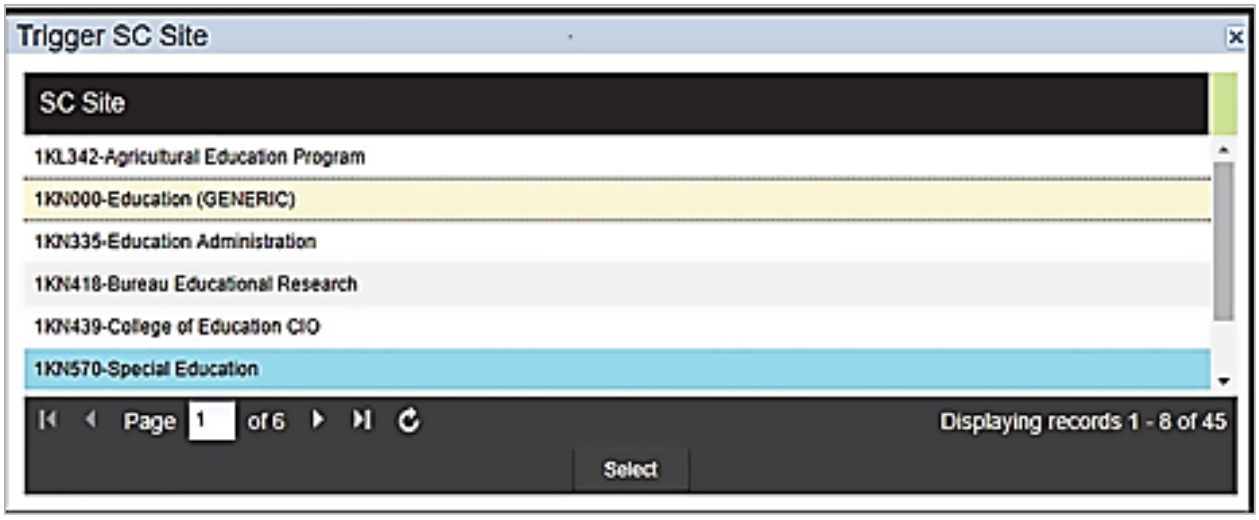
Search – Fields that contain a magnifying glass allow you to filter the search.



You may start to type in the field (like edu for education) and click on the magnifying glass to filter the search results for edu, or you can click on the magnifying glass to search the entire table. Some tables have numerous options listed, so you may have to page down through the list to find the option you want to select; therefore, it is recommended to use the filter option.

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Select an item from the list and then click **Select**. The selected item appears in the field as shown below:



Creating a Ticket

Tickets are created by adding all the necessary information required for the request to be completed efficiently by UIF staff. Tickets are classified by a three-tiered approach to define the type of request you want to submit. This information is vital to ensure your request is assigned to the appropriate person or department so the request can be completed in a timely manner. These three tiers are Category, Type, and Item. What is chosen for the Category determines your options for Type, what is chosen for Category and Type determines your options for choosing the item. Then the rest of the form is filled out according to those choices.

NOTE: For an Advancement Support request, the Type field is only available if the Category selection is Data Services. Some Item drop-down options are associated with the Category selected and not with the Type selected.

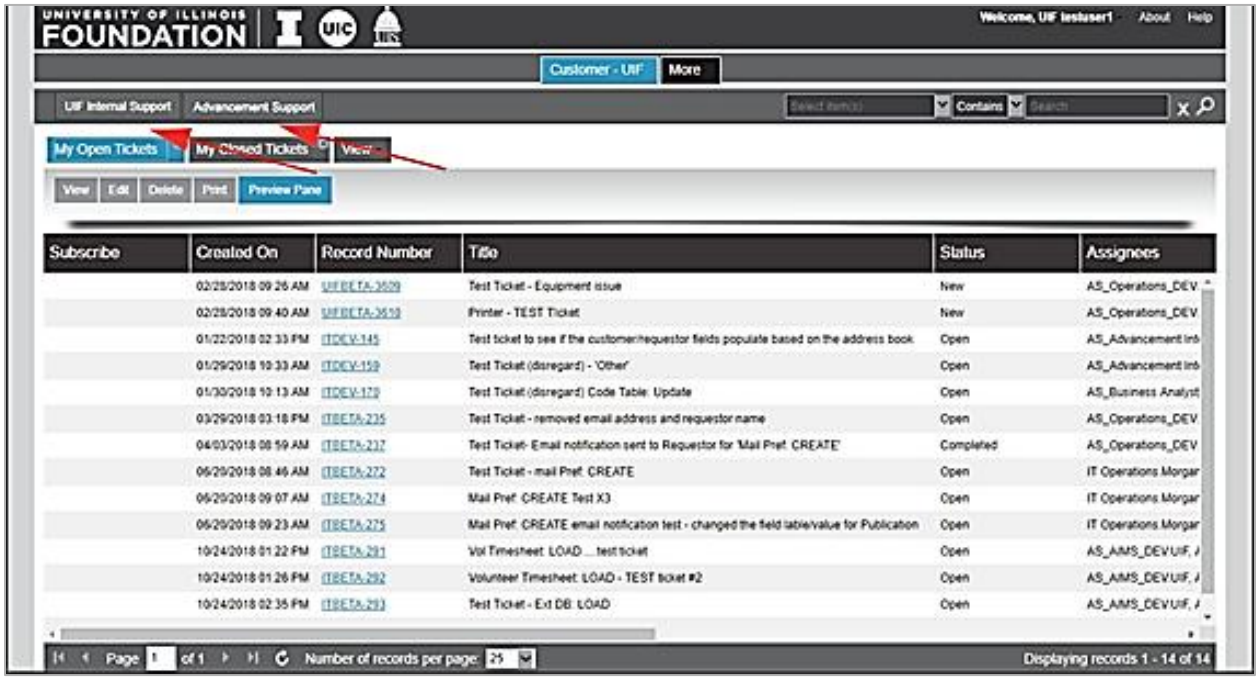
Choose one of the following options:

- For UIF staff only - Click **UIF Internal Support** to submit a request for UIF Applications, Printers, Equipment, etc. These options replace the options available on the services site. Continue to "How to Use UIF Internal Support (UIF Staff Only)" on page 15.

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- For UIF and Advancement Support staff - Click the **Advancement Support** link to submit a request for Data Services and Enterprise Applications support. This option should be chosen to submit requests for BBIS, Cvent, UIF Support, Hyland OnBase, TED, or UIF Online. Continue to "How to Use Advancement Support" below.



How to Use Advancement Support

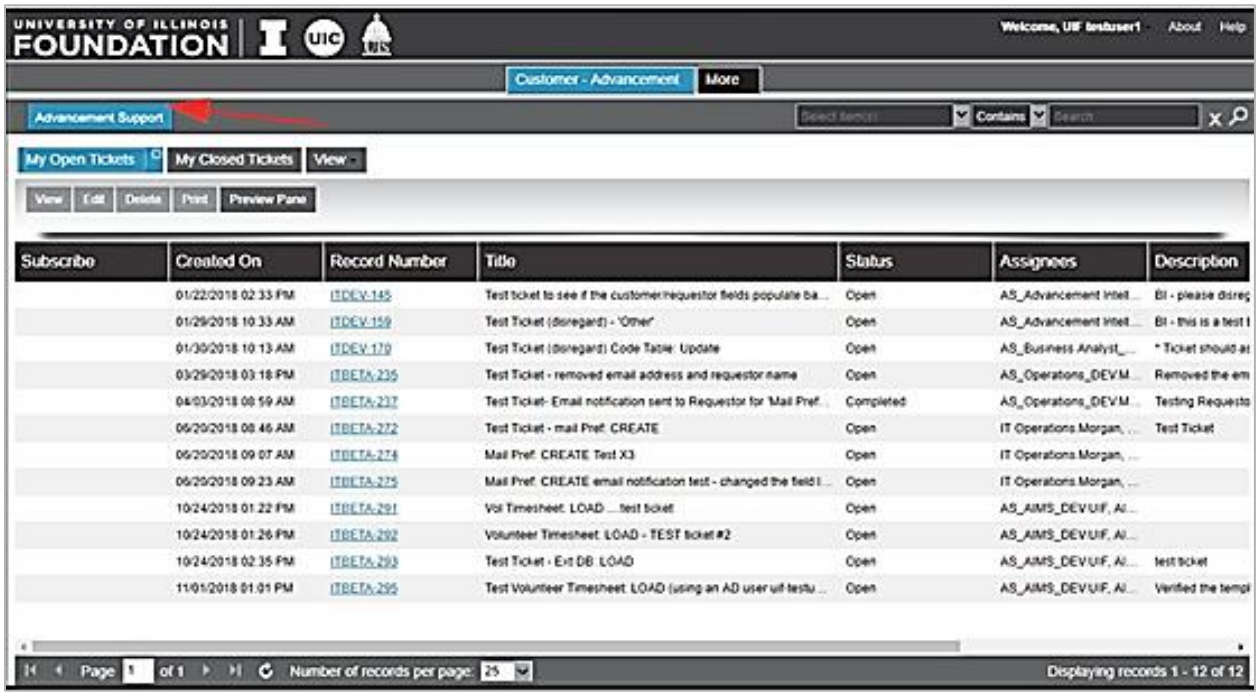
Advancement Support is used to submit a request for Enterprise applications supported by UIF. This includes reports, updates, access, issues, etc. regarding TED, BBIS, UIF Support, Cvent, Hyland OnBase, and UIF Online.

NOTE: Contact UIF Advancement Information Management & Support with any questions about this Data Services form at aims@uif.uillinois.edu or (217) 300-3907. This form replaces forms available on the UIF Help Tab in TED and FootPrints (uillinois.edu) **(https://support.uif.uillinois.edu/footprints/servicedesk/login.html).**

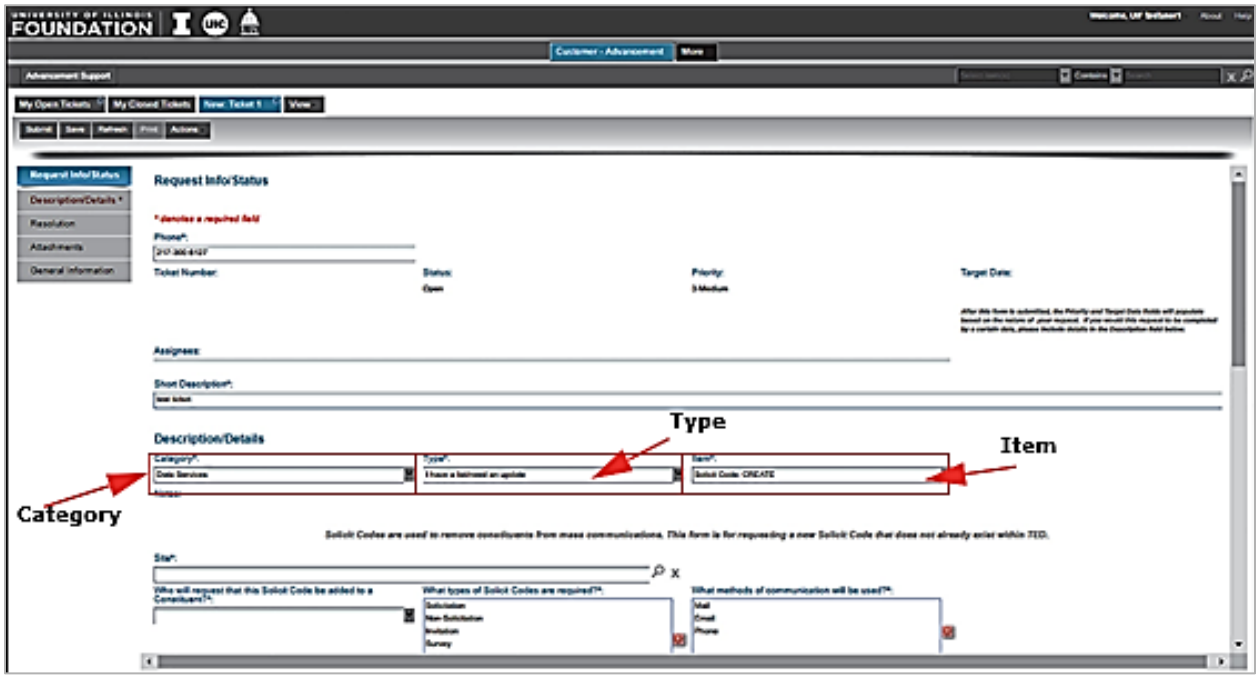
website.

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1. Click the **Advancement Support** link.



The following screen will appear after clicking on the Advancement Support link.



NOTE: Required fields are marked with an asterisk (*)

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2. Type your ten-digit preferred callback number at the Phone field in Request Info/Status section.

3. Type a Short Description for the ticket in the Description/Details section. Tickets are classified based on the Category/Type/Item fields.

4. Select an option from the Category field drop- down list:
   - **Data Services** - Request lists, updates, data loads, and obtain sums/totals, and data analysis for TED. This option is used to add/update TED information or request a report.
   - Enterprise Applications allows you to submit requests for BBIS (Portal), Cvent, Hyland OnBase, TED, UIF Online, or the UIF Support/ FootPrints ticket system. This option is used for access, enhancements, errors, or questions for any UIF application.
   - **Access** - Request access to Enterprise Applications (Cvent, **UIF Support/ FootPrints ticket system**, Hyland OnBase, TED, or UIF Online).
   - Online Giving Services allows you to request Crowdfunding-related services.

   ***Example:**

   If you want to request a donor list, select the following:

   - Category = Data Services
   - Type = I need a list
   - Item = Donor List

   If you want to have a new Mail Preference Code created, select the following:

   - Category = Data Services
   - Type = I have a list/need an update
   - Item = Mail Preference Code: CREATE

5. Select an option from the Type field drop-down list if you have chosen Data Services for the Category field above.

   For the Category selection of Data Services, the following Type fields values are available:

   - Use **I need a list** to create a new list/report. *
   - *Exception: For Prospecting Lists, log into TED and submit a Research Request.
   - Use **I have a list/need an update** for an upload of data, update or create data in TED, etc.
   - Use **Other** to obtain Sums/Totals/Data Analysis.

   For the Category selection of Enterprise Application, the following Type fields values are available:

   - Use **BBIS (Portal)** to submit a BBIS request.
   - Use **Cvent** to submit an error or a general or report request.

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- Use **Hyland OnBase** to submit an error or a general request.
- Use **TED** to submit an error, a general request, or a training request.
- Use **UIF Online** to submit an error, files and reports, or general request.
- Use **UIF Support / FootPrints ticket system** to submit an error or an enhancement, general, or report request for the UIF ticketing system.

For the Category selection of Online Giving Services, the only type is Crowdfunding.

6. Select an option from the Item field drop-down list. The options available are common lists/reports or common update tasks in TED. Other drop-down options are based on the Category selected, which include requesting access, submitting an error, or requesting general information about a product or service. If you are unsure of what option to select, contact AIMS (aims.uif.uillinois.edu*).*

***Example**:

If you would like to request specific access to OnBase, select the following:

- Category = Hyland OnBase
- Item = Access

If you would like to ask for additional information about UIF Online, select the following:

- Category = UIF Online
- Item = User Question

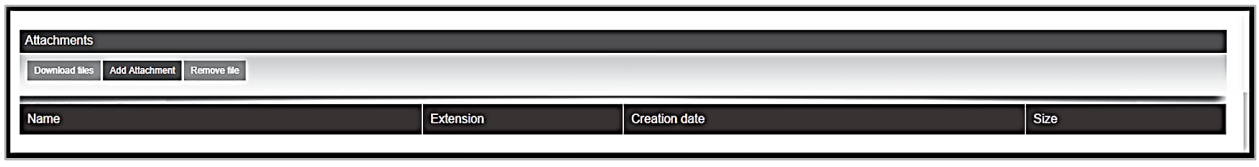
7. The remaining fields displayed are dependent on the options selected in the key fields above. Fill in the appropriate details in the remaining fields on the form, as needed.

8. Any required field not completed displays as red and must be completed before a ticket may be saved or submitted.

Adding Attachments to a Ticket

Attachments may be added to a ticket to provide additional information.

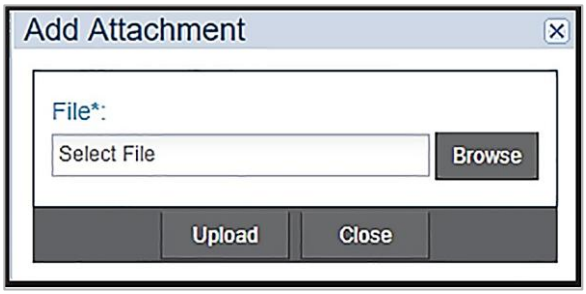
1. In the Attachments section, click the **Add Attachment** button.



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- This dialog box will display



NOTE: The maximum files size for each attachment is 20MB.

2. Click the **Browse** button. Select the file you want to attach and click **Open**. The file name will appear in the File field.
3. Click **Upload**. The information appears in the Attachments list.

   NOTE: You may attach several files to your ticket. However, you may only attach/browse one file at a time.

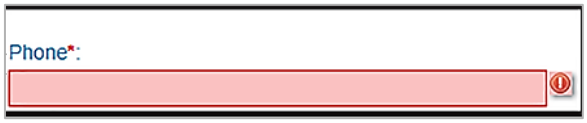
Saving and Submitting a Request

Once all the required information has been entered into the ticket form, submit the request. This creates the ticket and assigns it to the appropriate UIF staff. Submitted tickets are available to be viewed and edited from the View tab.

1. Save AND/OR Submit
   - Clicking on the **Save** button will save the request and leave the edit tab open. You will want to do this if you have to leave the request and come back later to finish. You will be logged out after 45 minutes of inactivity and will lose any unsaved changes. The ticket is locked until it is submitted, preventing UIF staff from opening or editing the ticket.

   - Clicking on the **Submit** button will submit the request to UIF staff and *close* the edit tab.

2. Any required field not completed displays as red and must be completed before a ticket may be saved or submitted as shown below:

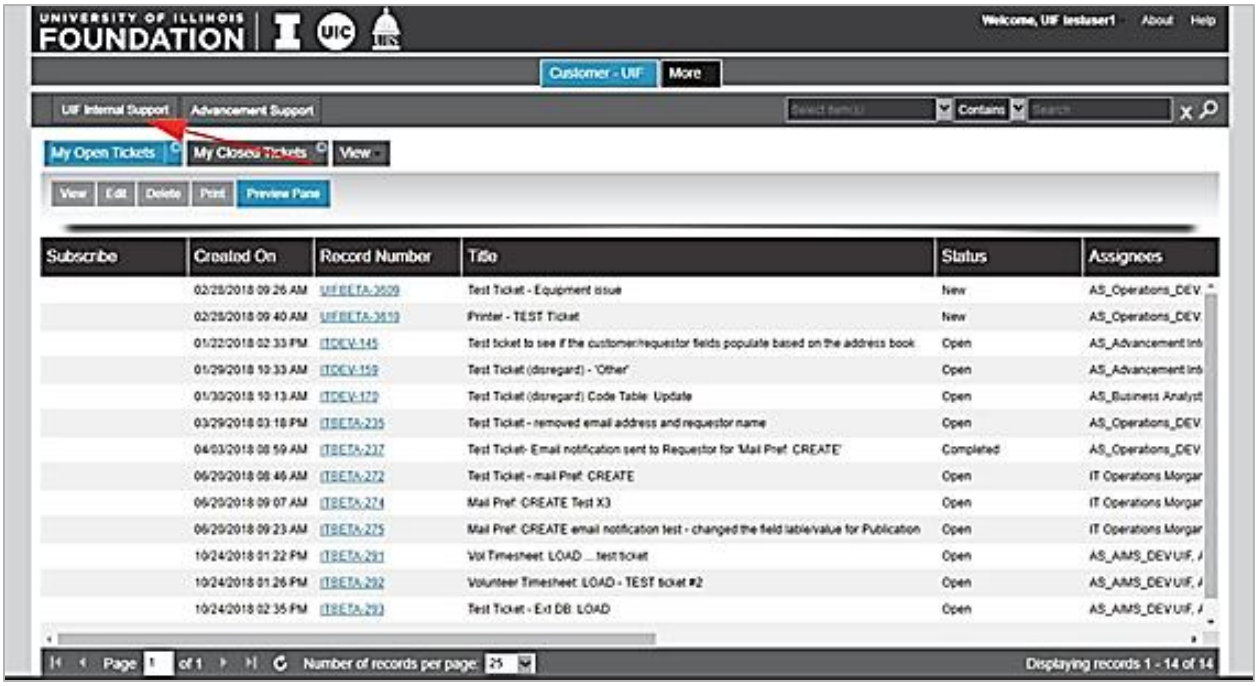


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3. Once a ticket is submitted, you and the assignee(s) will receive an email notification containing the basic details provided in the ticket.

How to Use UIF Internal Support (UIF Staff Only)

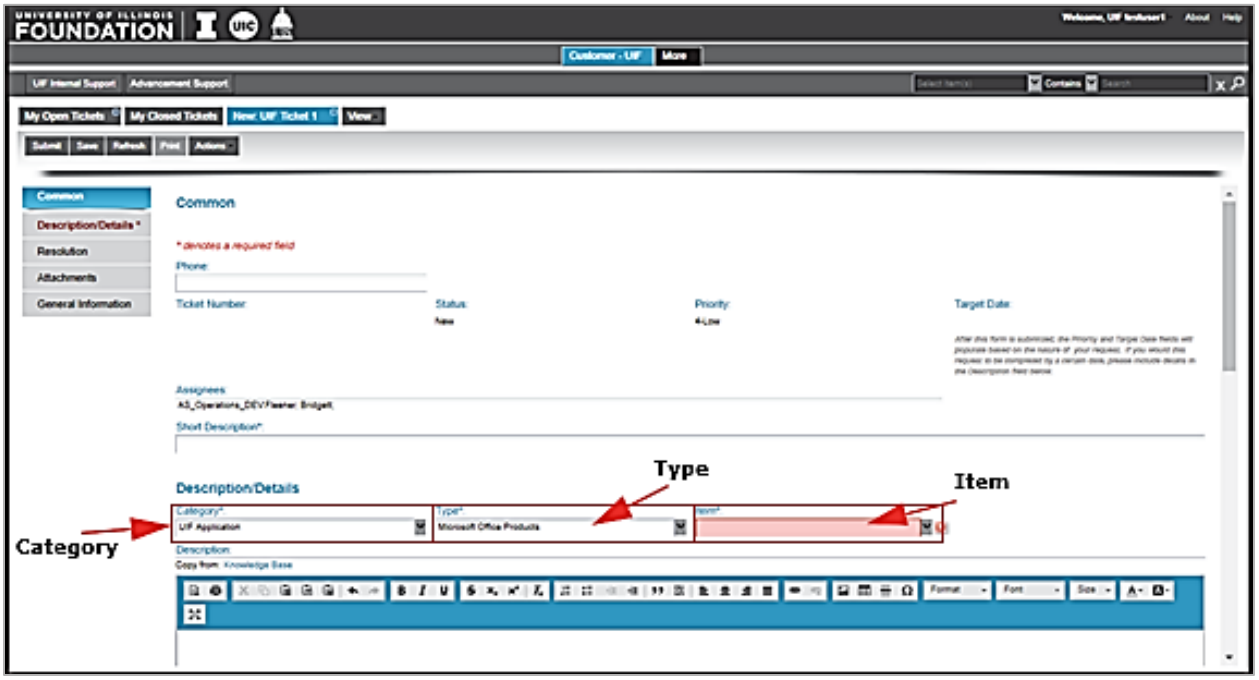
UIF IT Support is used to submit a request for UIF applications, computer/phone/laptop, equipment, conference room A/V issues, printer, or other issues. This includes access to files/folders, remote access, computer/phone/equipment issues, meeting room walk-through or issue, printer issues, and restoring files.



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1. Click the **UIF Internal Support** link to submit a request for UIF Applications, Printers, Equipment, etc. These options replace the options available on the services site.



NOTE: Required fields are marked with an asterisk (*).

2. Type your ten-digit preferred callback number in the Phone field in the Request Info/Status section.

3. Type a Short Description for the ticket in the Description/Details section. Tickets are classified based on the Category/Type/Item fields.

4. Select an option from the Category field drop- down list:
   - **Access** - Submit a file folder/drive, Banner, can't login, remote access, or other access request not in this list.
   - **UIF Applications** - Submit a Microsoft Office Product, Email/Outlook, Financial Edge, Skype, HRMS/ESS, Adobe Products, or other request not in this list.
   - **Computer/Phone/Equipment** - Submit a purchase, office move, loaner, computer/laptop, accessories, or other request not in this list.
   - **Conference Room A/V** - Submit a walk – through, meeting room, or other request not in this list.
   - **Printer** - Submit a jamming, print quality, maintenance, or other request not in this list.
   - **Other** - Submit a file restore or other request not in this list.

5. Select an option from the Type field drop-down list. The drop-down selection list is based on the option selected in the Category, which include folder/drive access, UIF application, Computer/Phone/Equipment, conference room A/V printer, and file restore requests.

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6. Select an option from the Item field drop-down list. The options available are error, install, update, connection, accessories, and printer issues. The drop-down selection list is based on the options selected in the Type field.

   ***Example:**

   To report an issue with email, select the following:

   - Category = UIF Application
   - Type = Email/Outlook
   - Item = Error

   To request a new keyboard, select the following:

   - *Category = Computer/Phone/Equipment*
   - *Type = Accessories*
   - *Item = Keyboard*

7. Any required field not completed displays as red and must be completed before a ticket may be saved or submitted.

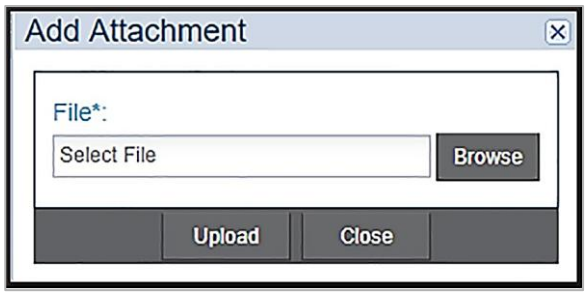
Adding Attachments to a Ticket

Attachments may be added to a ticket to provide additional information.

1. In the Attachments section, click the **Add Attachment** button.



This dialog box will display



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2. Click the **Browse** button. Select the file you want to attach and click **Open**. The file name appears in the File field.
3. Click **Upload**. The information appears in the Attachments list.

NOTE: You may attach several files to your ticket. However, you may only attach/browse one file *at a time.*

Saving and Submitting a Request

Once all the required information has been entered into the ticket form, submit the request. This creates the ticket and assigns it to the appropriate UIF staff. Submitted tickets are available to be viewed and edited from the View tab.

1. Save AND/OR Submit
   - Clicking on the **Save** button will save the request and leave the edit tab open. You will want to do this if you have to leave the request and come back later to finish. You will be logged out after 45 minutes of inactivity and will lose any unsaved changes. The ticket is locked until it is submitted, preventing UIF staff from opening or editing the ticket.

   - Clicking on the **Submit** button will submit the request to UIF staff and *close* the edit tab.

2. Any required field not completed displays as red and must be completed before a ticket may be saved or submitted, as shown below:



3. Once a ticket is submitted, you and the assignee(s) will receive an email notification containing the basic details provided in the ticket.

Email Notifications

The following triggers email notifications to be sent, containing specific details, as defined in the table below.

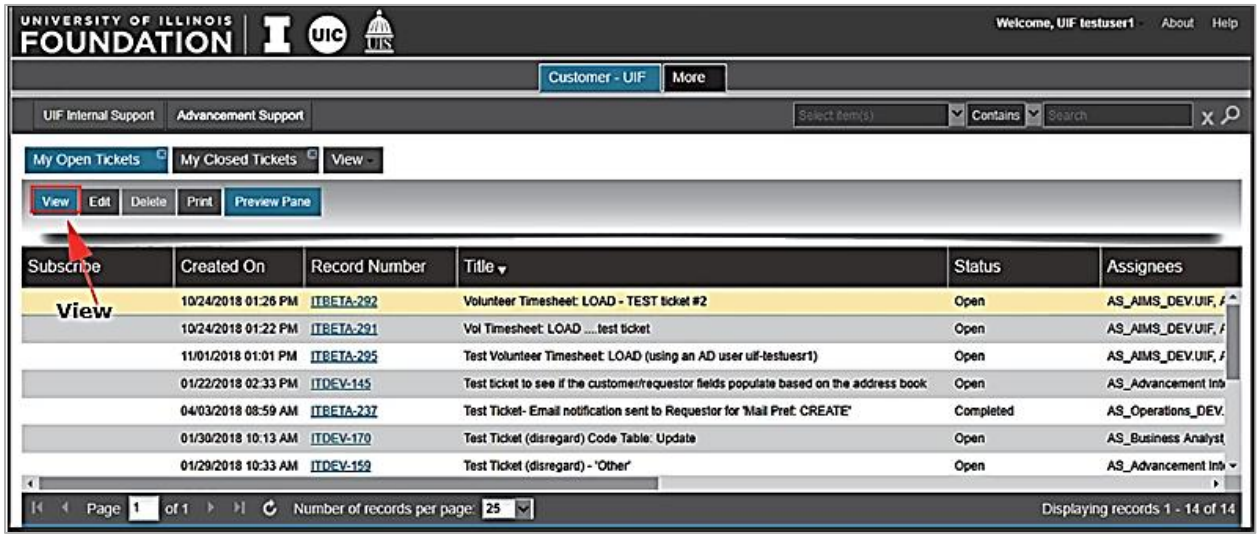
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Notification Trigger	Individual(s) Notified
Newly created tickets	Requestor & Assignees
Ticket Description field is updated by Requestor	Assignees
Ticket Description field is updated by Assignee	Requestor & any additional Assignees that were not the one to update the description.
The Status of the ticket is changed to Closed	Requestor

Viewing and Editing a Ticket

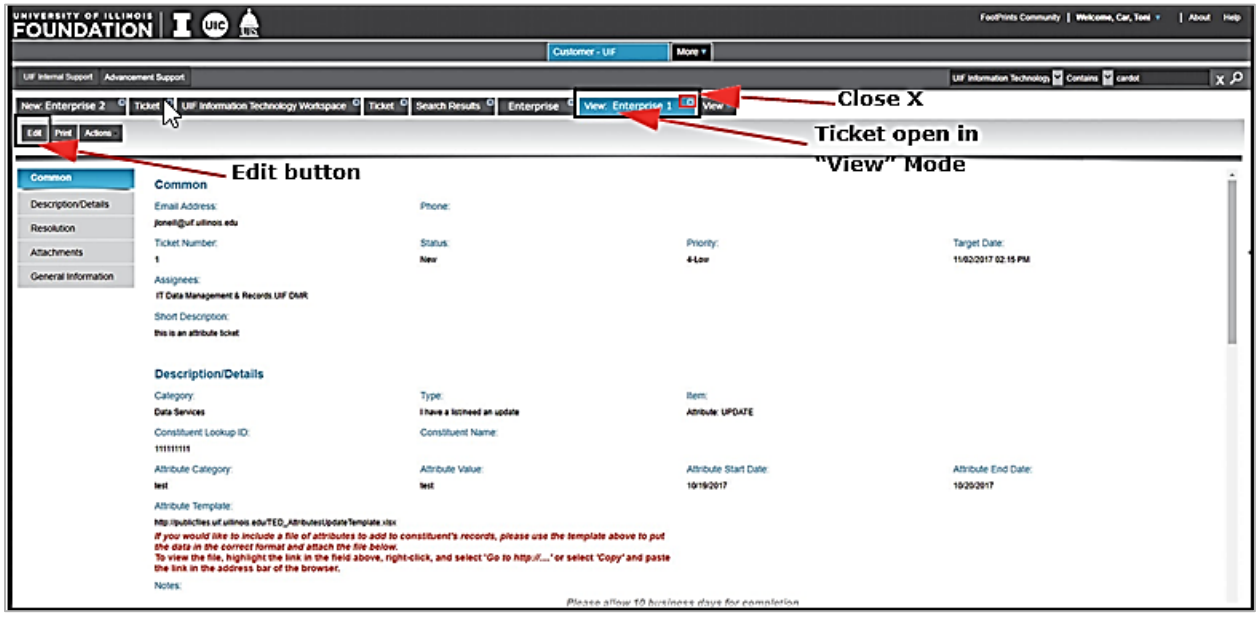
A submitted ticket may be edited or viewed as needed.



1. From either the 'My Open Tickets' or 'My Closed Tickets' tabs, highlight the ticket you want to view or edit, and click the **View** or **Edit** button depending on what action you'd like to take. This opens the ticket in a new tab within the window.

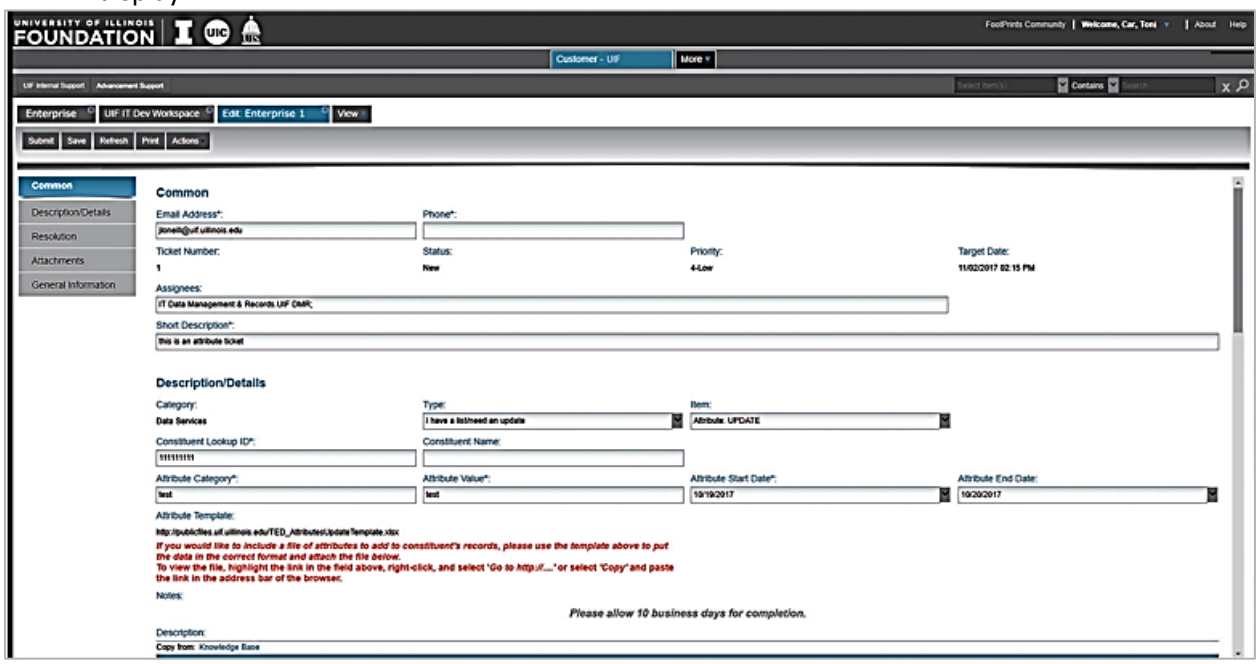
NOTE: If you open in "View" mode and decide you want to Edit the ticket, there is an Edit button available in "View" mode as shown in the screen below.

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2. Review the comments in the Description field to get the updates for the ticket.

3. View Attachments if necessary:
   To download a file:
   a. Select the attachment in the list and click **Download files.**
   b. Select whether to open or save the file.
      - If opening the file, click **OK**. The file opens if an application is available for that file type.
      - If saving the file, click **Browse** to select a save location and then click Open. The file is saved.
4. If you need to update the ticket details, click the **Edit** button and the following screen will display:



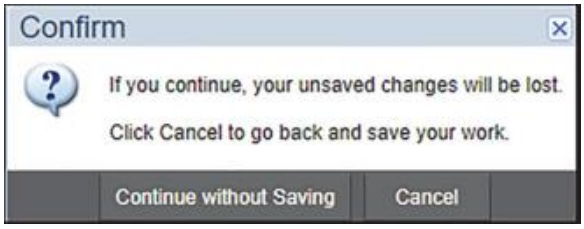
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NOTE: To alert the assignees of a change to the ticket, the Description field must be edited.

- To add an entry, type information in the text area field.
- If you were the last one to update the Description, you can edit the previous entry. In the Description History section, click **Edit Last Entry**, make the necessary changes, and then click **OK**.
- Add any additional attachments in the "Attachments" section.

5. If you edited the ticket, click **Submit** to save and close the ticket and this will send an email notification to the assignees that a change was made.

- If no changes were made to the ticket, you can click the X in the upper right-hand corner of the ticket tab to exit it. If you were in "Edit" mode and click the X to close the ticket, you will receive the following message:



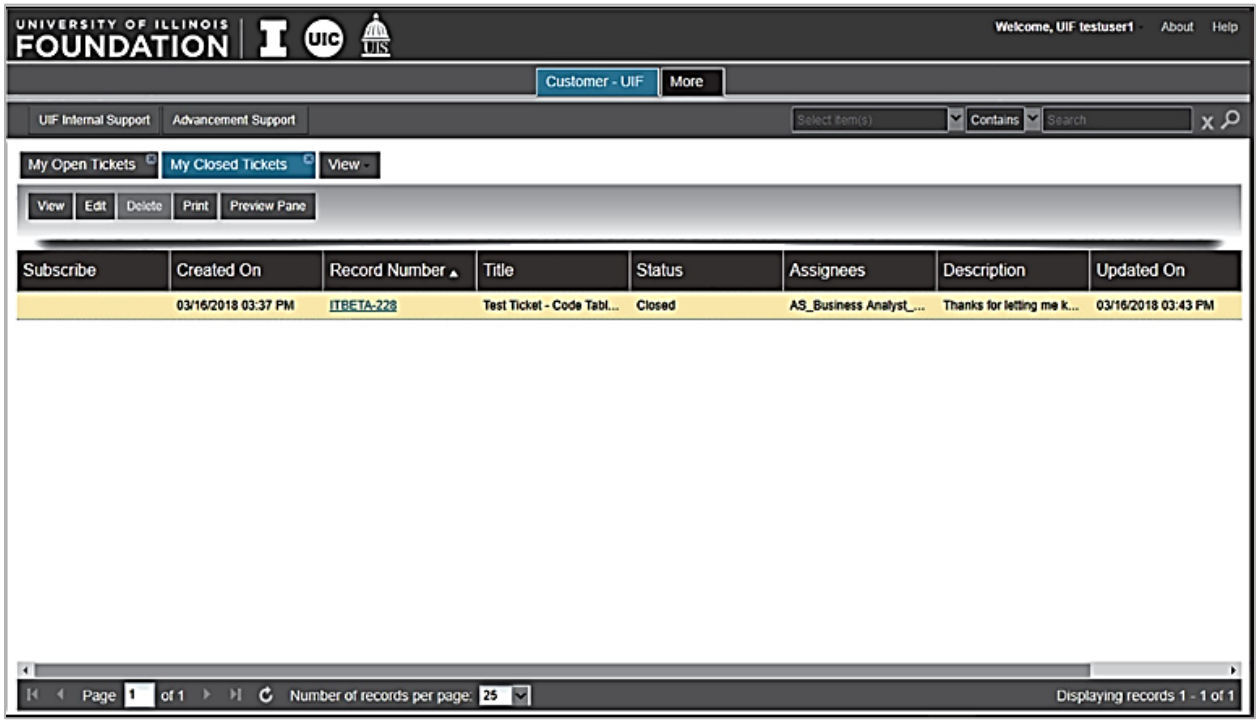
Do one of the following:

- Click **Continue without Saving** to exit the ticket without saving it.
- Click **Cancel** to return to the ticket.

Viewing Closed Tickets

You may view a list of your closed tickets from the My Closed Tickets tab.

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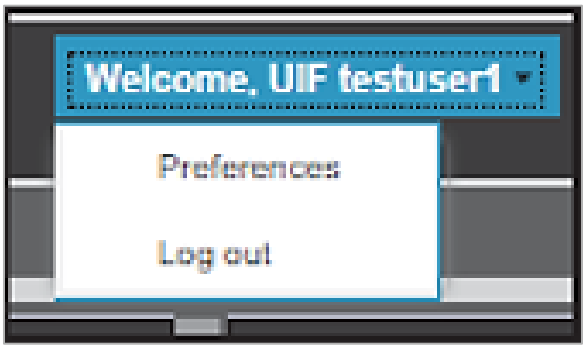


NOTE: Closed tickets may be viewed but should not be updated. If you must update a closed ticket, the Description field must be updated in order to send *a notification to the assignees.*

Logging Out

Once you have completed all your work within your tickets and have closed all tabs, you may log out of your UIF Support session.

1. At the Log Out area of the UIF Support Console screen, click the **Welcome, XXX** drop down arrow as shown below:



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2. Click **Log Out**. Your session is closed and you return to the login screen and see the following message:



Troubleshooting

This section is a guide to help resolve common problems and messages.

1. All inactive users will be logged out after 45 minutes of inactivity, and you will lose any unsaved changes. Editing/creating a new ticket is not considered as being "Active" in the session, so you will need to save the ticket details often and then edit the ticket to add additional information, as needed.
2. If a newly created ticket does not display in your view/list, click the refresh button to update the page. You may also need to remove any filters that have been set.
3. If you attempt to edit a ticket that is already being edited by another user, you will receive this message.



- Wait to edit the ticket and try again later, or contact the person editing the ticket and ask him/her to close the ticket so you may open it in edit mode.

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4. If you attempt to edit a ticket, and the ticket is updated via email by someone else while you have it open in "Edit" mode, you will receive this message.

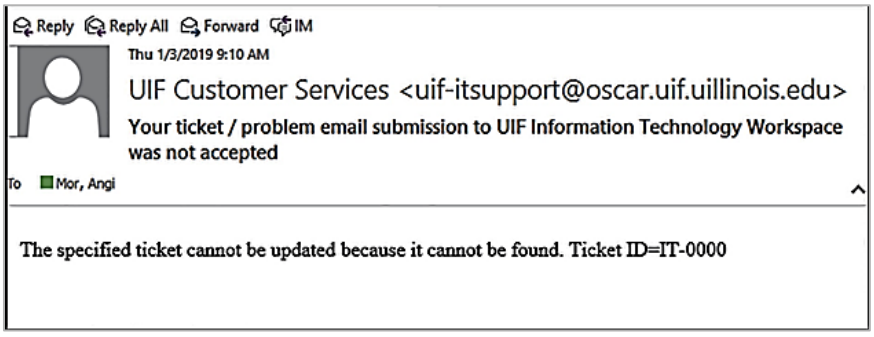


- You may click **Close** to close the ticket without saving your changes.

- If you click **Cancel** to return to the draft, you will not be able to save any updates you made to the ticket, but the ticket will remain in "Edit "mode.

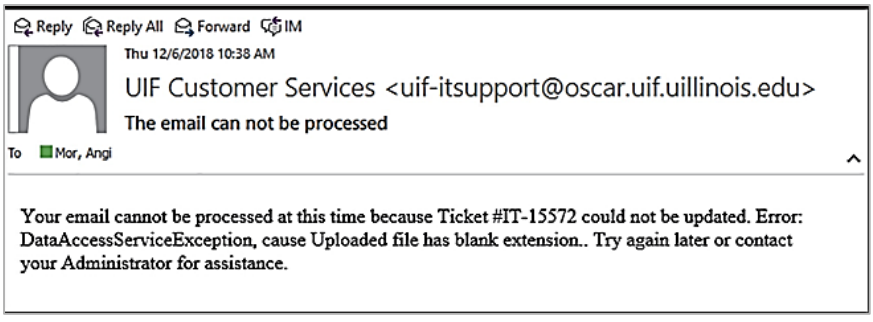
- You may copy any updates you added to the Description field of the ticket, and then click **Close**. Re-open the ticket in "Edit" mode, paste (**Ctrl+V**) the content you previously copied from in the Description field, and then Submit the changes.

5. If you attempt to update the ticket by replying to an email and the ticket cannot be found, check the subject line of the email. Did you change the subject line? You may receive this message.



- Find the original email and reply back to the email and do not change the subject line. Specific information is required in the subject line to update the correct ticket.

6. If you attempt to update a ticket by replying to an email, but there is an attachment in the email that does not have an extension, sometimes this is caused by the signature that is configured and automatically added to your email. You will receive this message.



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- Please remove any attachments from the email in your sent folder and re-send the message to update the ticket.

Glossary

Console- Contain the majority of the working space for a user. It is comprised of the following components:

View- provide customized lists of records

Actions- provide the ability to create new records

Knowledge Base- A container that is used to store information like troubleshooting and how to, which can help users resolve their tickets. The Knowledge Base is not available at this time but will be available with future enhancements to UIF Support.

UPDATED 7/26/24

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CONSTITUENT RECORDS

The following section provides details about constituent records in TED.

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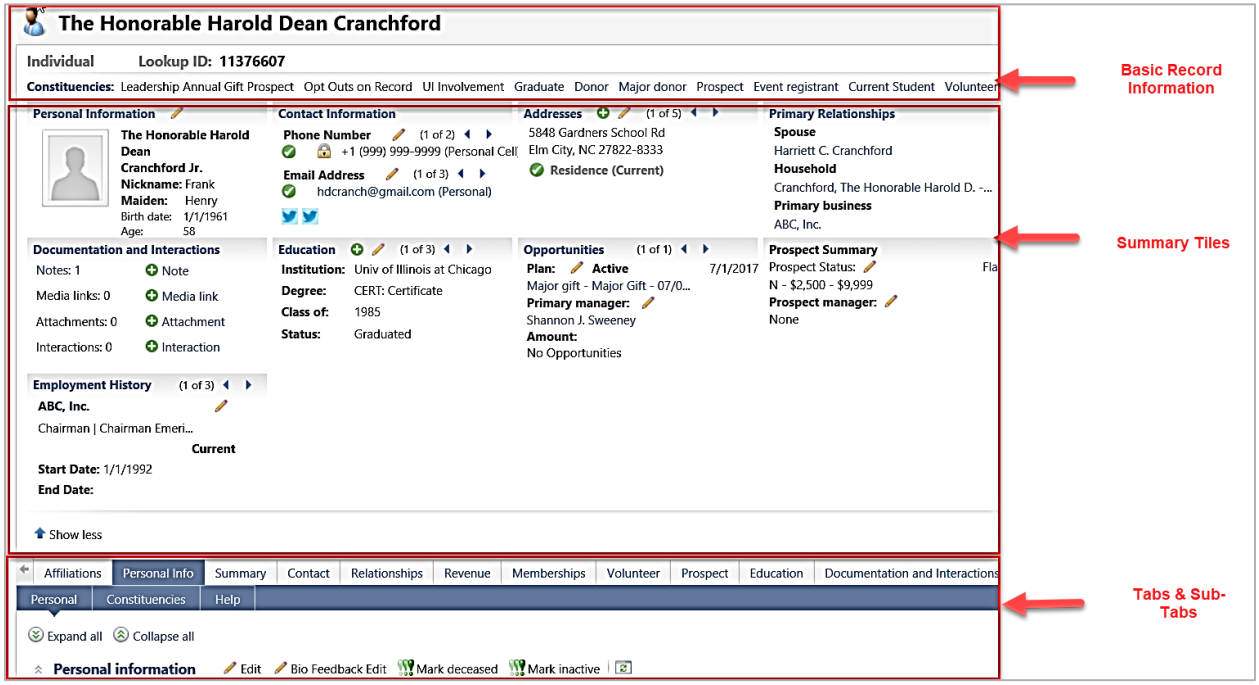
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CONSTITUENT RECORD FUNDAMENTALS

EACH AREA EXPLAINED

Constituent records are at the core of TED and will be your starting place for most inquiries or transactions.

Below is a view of a constituent record with each section outlined. Based on your access and how you have customized your screens, your view may differ from those shown.



Basic Record Information



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1. The **Icon** changes depending on the record type and can help you tell at a glance what type of record you are on. Icons include:

    a. Individual 
    b. Household 
    c. Organization 
    d. Group/Committee 



2. The **Name** of the record is based on the information stored in the following location and fields:

    a. Individual – Personal Info tab, Name format = Preferred
    b. Household – The standard name includes the preferred name for each household member, with the primary member listed first. A custom name option is available.
    c. Organization – Organization Info tab, Organization details = Name field
    d. Group/Committee – Stored as part of the record as it was originally created (or modified) the Name field is not shown in any other field.

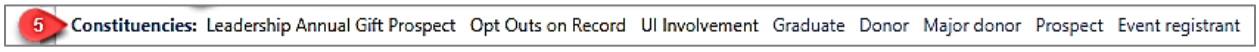
3. **Record types** correspond with the icon shown on the record and include:



    a. Individual
    b. Household
    c. Organization
    d. Group/Committee

4. A **Lookup ID** is a unique id number assigned to each record as they are created in TED. This number is displayed on many reports and is a time-saver when looking for a specific record.





5. **Constituencies** show at a glance the involvement with the University of Illinois and varies by each record. Constituencies that display in blue text are clickable shortcuts to related detail information. Constituencies that display in black text are options that we have customized and are not clickable.

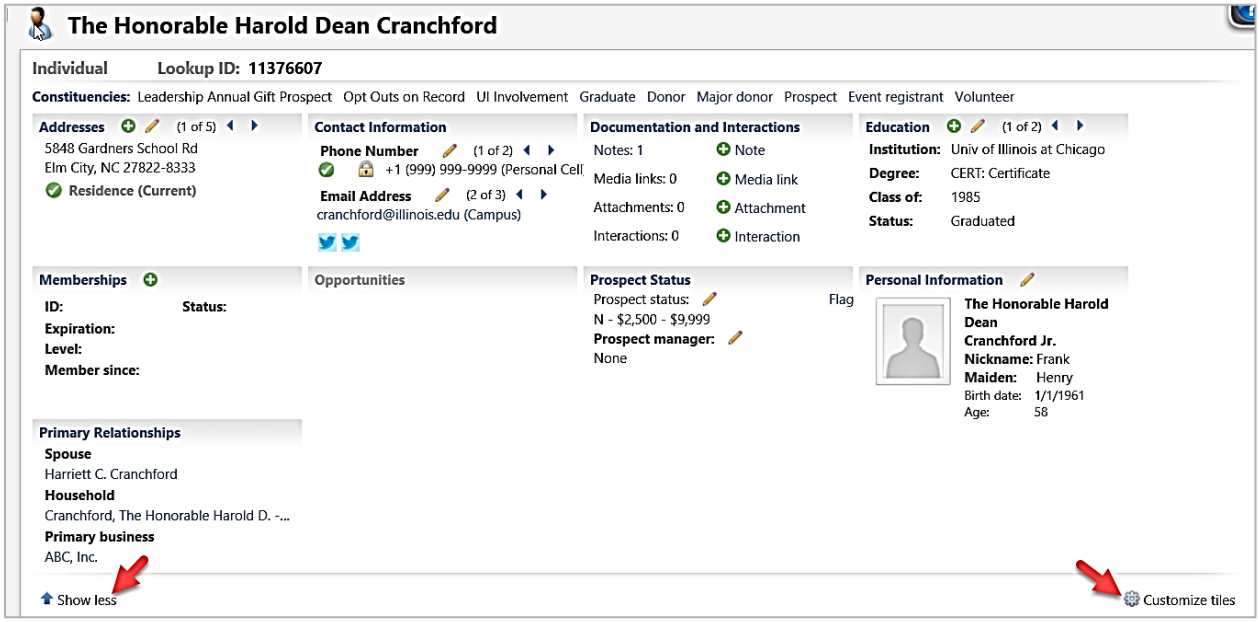
In addition to the basic data, some records may contain special notifications you may need to be aware of; when these are on a record they display below the name and can be opened for more details.



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Summary Tiles

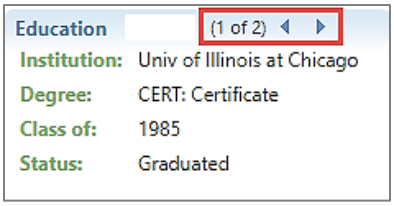


The summary tiles display at-a-glance information for a record. You can choose the tiles to display using the customize tiles option. See the *Customize Ted* document for complete instructions.

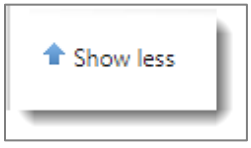
There are summary tiles for the following:

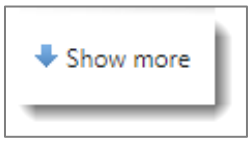
- Addresses
- Contact Information
- Documentation and interactions
- Education
- Memberships
- Opportunities
- Prospect Summary
- Personal Information
- Primary Relationships

The blue text in summary tiles are links to corresponding details in the tab below. A summary tile containing more than one record can be accessed by clicking the side arrows as shown here.



The summary tile area can be hidden using the Show less option and displayed by using the Show more option. Hiding the summary tile area allows more viewing room when you are looking at details on a tab in the bottom section of the record.



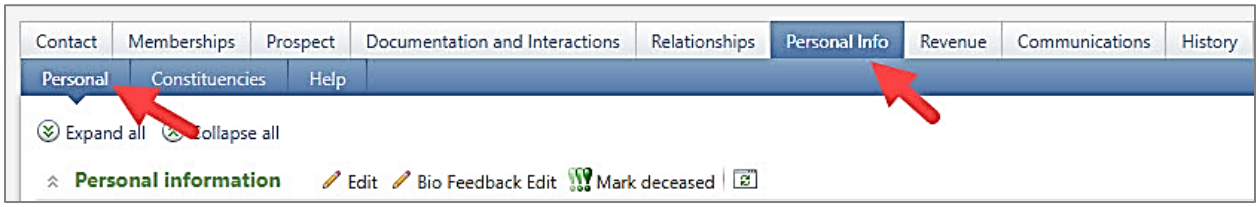


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Tabs and Sub-Tabs

Below the summary tiles are tabs and sub-tabs that contain additional details about the record.



Click a tab to open it, and then click on the appropriate sub-tab. When you open a constituent record, the information displayed in the tab area is dependent on which tab is in the far-left tab position. Tabs and sub-tabs can easily be arranged by dragging them. Some people find alphabetizing the tabs to be helpful or moving the tabs they use most often to the far-left positions.

A tab may not show on a constituent record if it doesn't apply – for instance, if a constituent has never registered or attended an event, the event tab doesn't apply and won't be displayed.

REVIEWED 7/11/25

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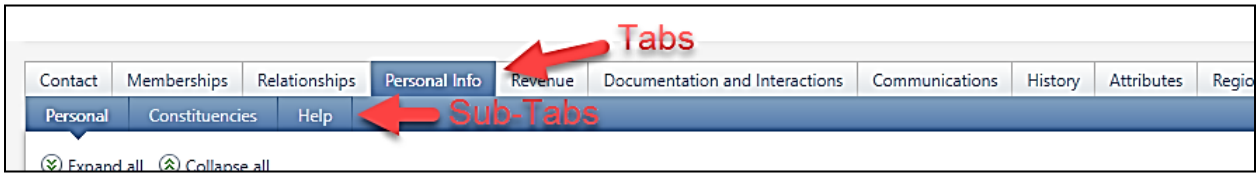
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CONSTITUENT TABS

COMPLETE LIST OF TABS FOR INDIVIDUALS, HOUSEHOLDS AND COMMITTEES/GROUPS

Detail information is stored in tabs and sub tabs in the bottom part of a constituent's record.

Some tabs will not display if they do not apply to a constituent. Examples are the events and volunteer tabs - a constituent that has never registered for an event, or had volunteer data entered on their record, will not have the Event Registrant or the Volunteer constituency and will not have the tabs in their record. If the constituency is added the tabs will appear.



Tabs and sub-tabs can be reordered by dragging them to the left or the right. They will display in the same order for each constituent record.

When there are more tabs to display, an arrow will appear so you can scroll to the right or left.



Tab Descriptions

The following table lists each tab and a brief description of what is displayed there.

Tab/Sub-Tab Name	**Description**
Affiliations Sub- Tabs: Individual Household Help	Affiliation scores for an individual are found on this tab. Affiliation scores are a means to efficiently create pools of prospects for gift officers. Based on the highest affiliation ranking by unit, a gift officer is free to begin a qualification plan consistent with UI Development Program prospect management guidelines. This information is updated by a process that runs nightly based on involvement with the University of Illinois. **The help section on the Affiliation tab outlines the calculations used.** The Individual sub-tab was designed to display the Affiliations for individual members of a household. The Household sub-tab displays the total aggregated affiliation points for both members of the household. The Individual Detail sub-tab displays a Subcategory breakdown of all Affiliation categories at the individual level.

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	The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Attributes Sub-Tabs: Attributes Help	If a constituent is a member of a Recognition Society, this information is stored on the Attributes tab. Recognition Societies are public acknowledgement of a University of Illinois constituent's gift. Examples include the Presidents Council and Chancellor's Circle. Attributes are manually entered on a constituent's record. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Comments Sub-Tabs: Comments Help	The Comments tab is a means to submit a Bio Feedback Comment on a constituent's record. Bio Feedback Comments can include information to update on the constituent's record that you were not able to update by another means. Bio Feedback Comments are processed by Advancement Information Management and Support (AIMS). The Comments Sub-Tab is used for adding a comment via the Bio Feedback Add. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Communications Sub-Tabs: Appeals Communications Emails Preferences Help	A history of appeals, emails and communications for the constituent can be found on the corresponding sub-tabs under the Communications tab and is updated by the UIF Engagement. Mail Preferences and Solicit Codes are on the Preferences sub-tab. Mail Preferences are used to add constituents to a unit's mass communication mailing list. Solicit codes prevent people from receiving certain kinds of mass communications. Mail Preferences and Solicit Codes are updated manually. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Contact Sub-Tab: Contact Help	The Contact tab stores current and historical addresses, phone numbers, email addresses and social media information on a constituent. This important information is used to contact our constituents. The Contact sub-tab allows for entering additional addresses, phone numbers, email addresses and social media. If you have a new address, phone number or email address, this information should be added using the Bio Feedback Add or using the Add option (depending on your access).

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	The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Documentation and Interactions Sub-Tabs: Constituent Documentation Documentation Summary Interactions and Surveys Help	The Documentation and Interactions tab is the core of our fund-raising efforts and houses the details of visits, calls, and contacts with donors and potential donors. This tab shows a summary, as well as detailed information. The units manually maintain this valuable information. Interactions are entered on household records and are linked to individual constituent records. Surveys house a list of what the constituent has completed as well as the answers. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Documents Sub-Tabs: Documents Help	OnBase is the University of Illinois Foundation document management system used for the advancement community. Many of the constituent documents that are stored in OnBase will surface on the Documents tab for easy access. These include documents relating to Advancement, gift documentation, and constituent correspondence. Some revenue related documents like pledge cards and scanned gift images are found on the Revenue tab. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Education Sub-Tabs: Education Help	Summary and detailed information about current and previous student's education record from the University of Illinois is stored on the Education Tab. These records are updated at regular intervals from the Banner system. Degree information from other institutions can also be stored here and are entered manually. The Educational Involvement area allows additional options for units to store education information that is not stored on the education record, such as study abroad programs or specific courses you'd like to track. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Events Sub-Tabs: Registrations Help	The Events tab contains dates, attendance information, registration options, and other details related to events that a constituent has registered for. Units manually maintain event information. The Event registrant constituency must exist on a constituent's record for the Event tab to display on a record. Registrations show all the events that the constituent has registered for. The Help sub-tab houses job aids that are conveniently

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	located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Funds Received Sub-Tab: Help	The Funds Received tab displays constituent records who have been entered as a recipient of a scholarship (on the Fundraising, Purpose record), and will have the constituency of Financial Award Recipient. The fund name is a link to the purpose record and the date the fund was awarded is from the purpose record. The amount received will always be $0, since FERPA prohibits the amount from being entered. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Fundraiser Sub-Tabs: Pending Activity Fundraiser Summary Closed Opportunities Portfolio Active Opportunities Pending Step Summary Completed Step Summary Prospect Summary Research Requests Attention|Opportunities Attention|Plans Help	Advancement staff who are in a fundraiser role will have the Fundraiser tab displayed on their constituent record and the Advancement Staff constituency. The Fundraiser tab contains the same information that is found on the My Fundraiser page. The Pending Activity sub- tab shows a list of any plan steps that have been marked as Pending. The Fundraiser Summary sub-tab shows the fundraiser's job title, start date and advancement site. The Closed Opportunities sub-tab displays information detailing and segmenting the opportunities the fundraiser has closed. The Portfolio sub-tab displays a list of plans and prospect assignments for the fundraiser. The Active Opportunities sub-tab displays information detailing and segmenting different types of active opportunities the fundraiser is working. The Pending Step Summary sub-tab shows a summary of all plan steps with a status of pending. The Completed Step Summary sub-tab shows a summary of all plan steps with a status of completed. The Prospect Summary sub-tab shows a summary of all prospect plans for the fundraiser. The Research Requests sub –tab displays all Research Requests made by or for the fundraiser. The Attention|Opportunities sub-tab contains information on any errors or incomplete fields in the opportunities associated with the advancement officer. The Attention| Plans sub-tab contains information on any errors or incomplete fields in the plans associated with the advancement officer. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
History Sub-Tabs:	Various edits, adds and deletes that have occurred on a constituent's record are tracked on the History tab. The

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History Origin Help	transactions displayed on the history tab is maintained automatically in TED and may not include all edits. The Origin sub-tab shows the constituent source and details of the transaction. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
MatchMaker Sub-Tab: Help	This tab is not currently in use. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Memberships Sub-Tab: Help	Current and previous University of Illinois Alumni Association memberships are tracked on the Memberships tab. This tab is manually maintained by UIAA. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Personal Info Sub-Tabs: Constituencies Personal Help	The Personal Info tab contains general biological data and the different classifications of affiliation the constituent has with the university. The Constituencies sub-tab is used to classify and organize the affiliation/s that a constituent has within a unit. Prospect, graduate, and donor are just a few examples. The Personal sub-tab stores the constituent's name, title, suffix, marital status, and birth date. Nine different name formats using the name data stored here are used for both formal and informal correspondence. Units can contact their university's Annual Giving office to make changes to these name formats or add custom name formats. Additional items on the Personal tab include Aliases (useful for locating constituents), Demographics, Occupational Classifications (as needed by units), Alternate lookup IDs, Interests and Event Restrictions. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Prospect & Plans Sub-Tabs: Planned Gifts Plans Prospect Manager History Prospect Team Prospect Strategy Prospect Research History Help	The Prospect & Plans tab contains the current and historical prospect information for the constituent. Prospecting information includes the prospect summary, prospect team, prospect manager history, prospect strategy and the active plans currently on the constituent. The Planned Gifts sub-tab displays any gifts the constituent has agreed to give at a later date. The Plans sub-tab shows only the active plans for a constituent. The Prospect Manager History and Prospect Team sub-tabs display information on both current and prior advancement staff associated with the constituent Prospect summary

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	information includes prospect status or the wealth and ratings for the constituent as well as any historical research requests. The Prospect Team sub-tab allows for editing the advancement staff currently working with the constituent. And both the prospect team and the prospect manager history sub-tabs show the history of the advancement team. The Prospect Strategy sub-tab documents the overall strategy for a particular prospect. The Prospect Strategy sub-tab consists of three different areas: Prospect Strategy, Active Prospect Plans, and Household Active Prospect Plans. The Prospect Research History sub-tab displays any Research Requests made on the constituent. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Region Codes Sub-Tab: Help	Region Codes are geographical areas, updated by the TED system based on the constituent's contact information. Region codes are used for segmentation purposes in both mass communications and prospecting. Region codes include Alumni club region, Intercollegiate Athletics, U.S. and International Metro Regions and Urbana Regions. Constituents can have multiple region codes for each of the subsets based on residential and business addresses. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Relationships Sub-Tabs: Committees Relationships Fund Purpose Stewardship Relationship Tree Group Member Help	The Relationships tab contains the connections a constituent has, including family, friends and employer/employee relationships and are manually maintained by units. University appointments are housed on the Relationships sub-tab and are loaded at regular intervals by a process that imports the data from Banner. The Committees sub-tab is used to track a constituent's involvement and role in clubs or groups. These can be related to the University of Illinois or external clubs or groups. Units manually maintain this information. The Fund Purpose Stewardship sub-tab includes Stewardship Recipients and is manually maintained by units. The Relationship Tree sub-tab shows how each relationship with the constituent has links to another relationship in the TED system. The Group Member sub-tab identifies different groups the constituent is a member of in the TED system. This includes both current and previous group memberships. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.

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Revenue Sub-Tabs: Gifts Grants and Contracts Recognition Recognition History Revenue History Revenue Summary Tributes UI Household Giving Accounts Help	The Revenue tab contains information on the constituents current and historical giving, including gifts in kind, company matched gifts, revenue the constituent is receiving recognition for, and direct giving. The UI Household Giving sub-tab gives a comprehensive breakdown of the constituent's total giving by university, campus, department, and fund. The Revenue Summary and Revenue History sub-tabs show detailed information on any direct giving from the constituent. The Recognition and Recognition History sub-tabs show any revenue the constituent is receiving credit for. This can include gifts in kind, matching contributions, or soft credit. The Gifts, Tributes, and Grants and Contracts sub-tabs identify those specific types of giving into separate areas for easy view. The Accounts sub-tab allows for providing financial account information such as Financial Institution, Routing Number, Account Number/Type and EFT status. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Summary Sub-Tab: Help	The Summary tab gives general information on the constituents giving, activities, and communications. The revenue summary gives revenue information specific to the constituent and does not include any matching gifts, soft credit, or recognition credit. The recent revenue sections show the most current revenue activity on the record, again it does not show matching gifts, soft credit, or recognition credit for the constituent. The recent and upcoming activities section shows the most recent activity on the record including planned or pending plan steps, interactions, or event information. The recent and upcoming communications show the most recent, scheduled, and pending mass communications being sent to the constituent. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Updates Sub-Tab: Help	Contains updates that have been submitted using the Bio Feedback Add or Edits. This only includes updates since November 2015, when we went live with TED. The Help sub-tab houses job aids that are conveniently located right on the help tab itself or on the section that corresponds to each task of the constituent record.
Volunteer Sub-Tabs: Availability General Timesheets Schedule	The Volunteer tab appears on a constituent's record if they have the volunteer constituency. This tab can be used to track potential volunteers, and dates/times that a constituent has volunteered. Units manually maintain this information to track their volunteers.

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Awards Documentation Help	

Additional Tab on Household records (not on Individual Records):

Members	Contains current and previous household members and their link to the primary member.

Additional Tab on Committees/Group records (not on Individual Records):

Members	Contains current and previous committee members, start/end dates, and the constituent's role on the committee.

Note - When reviewing different tabs in TED it is important to know you may see both the individual and household records associated with the tab. Being able to quickly differentiate between the two can be helpful when reviewing these tabs.

REVIEWED 7/26/24

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NEW RECORD REQUEST

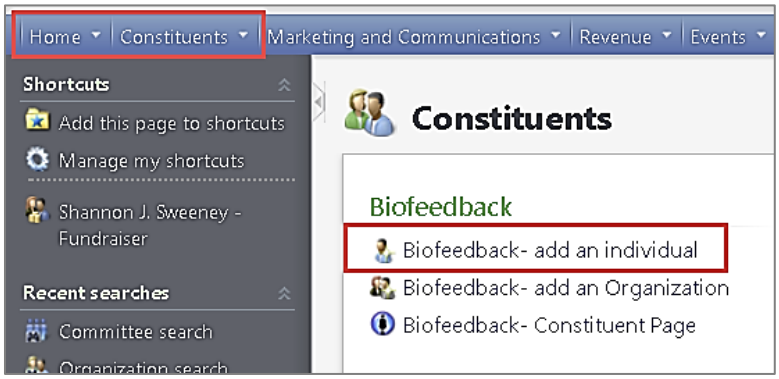
REQUESTING NEW INDIVIDUAL OR ORGANIZATION RECORD CREATION

It is important to keep a record of all donors, volunteers, affiliates, and supporters of the University of Illinois System. A record in the TED system allows University of Illinois users to share knowledge about communication and contact with the constituent. Unfortunately, there are times when a constituent does not have a record in the TED system. If there is no record for a constituent one must be created.

Requesting a New Individual Record

Every individual or organization has a unique record in TED. To request a new individual record be created use the Biofeedback – add an individual option found on the Home menu or the Constituents menu. It is important to fill in as much information as possible on the form. The minimum amount of information required for a new record to be created is the individual's **first and last name** and at least **one piece of contact information**.

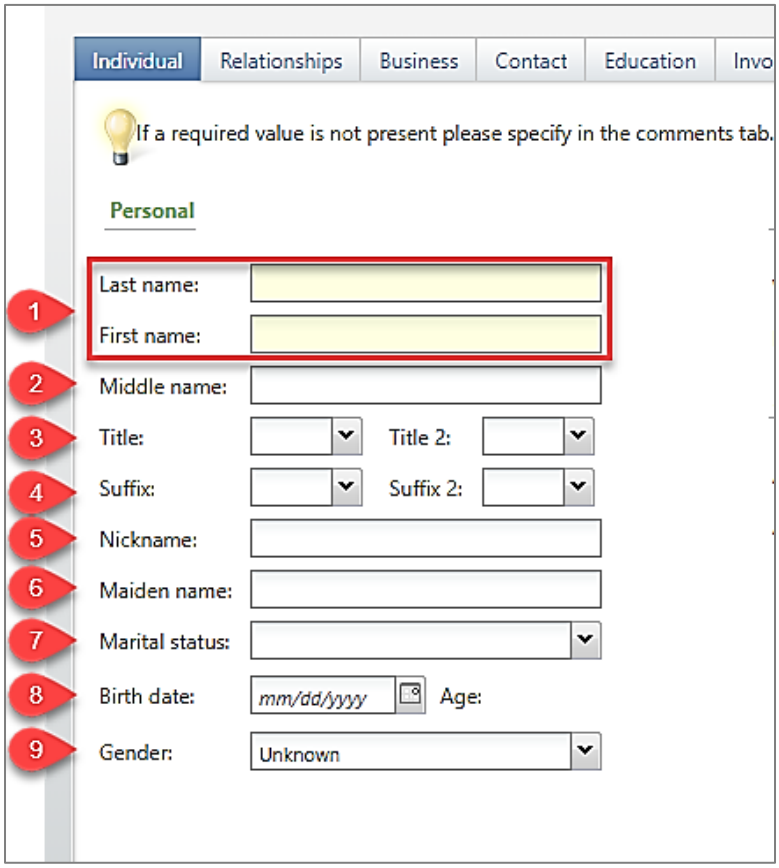
1. Begin on either the Home or the Constituents menu.
2. Select the **Biofeedback – add an individual option**. This will open the Biofeedback – add an individual window.



Individual Tab

This tab contains all the name and demographic information for the new individual record. This is a required tab.

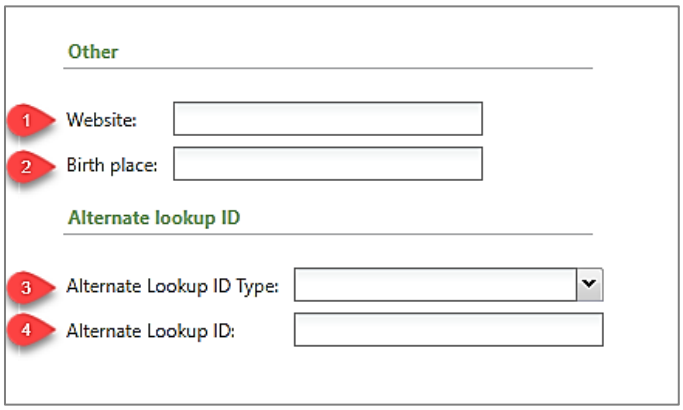
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1. The **First and Last name** fields are required. The first and last name fields are populated with the individual's full legal name. Abbreviated or nicknames should be added into the Nickname field.
2. The **Middle name** field contains the individual's middle name if known.
3. Complete the **Title & Title 2** field with the individual's title if known. While this is not a required field if the gender of the individual can be assumed by his/her name, and the individual has no other known title, completing the field with either Mr., Mrs., or Ms. is recommended.
4. The **Suffix & Suffix 2** should be completed with the individual's suffixes. This can include suffixes like roman numerals (ex: III) or degree-specific suffixes (ex: MBA) or government and military suffixes.
5. If the individual goes by a **Nickname** add the name to the nickname field.
6. If the individual is married and has a **Maiden name** add it to the maiden name field.
7. Complete the **Marital status** field from the drop-down menu.
    a. **Divorced** – Use when the individual is divorced.
    b. **Life Partner** – Use when an individual is not married but has a long-term significant other.
    c. **Married** – Use when the individual is married.
    d. **Separated** – Use when the individual is currently separated from his/her spouse.
    e. **Single** – Use when the individual is unmarried and does not have a life partner.
    f. **Unknown** – Use when the individual's marital status is unknown.
    g. **Widow/er** – User when the individual's spouse or life partner has passed away.
8. Once the individual's **Birth date** is added the **Age** field will auto-populate with the individual's age based on the date entered.
9. If it is possible to assume the individual's **Gender** based on his/her name or any other available information add his/her gender to the record from the drop-down menu.
    a. **Unknown** – Use if the individual's gender is unknown
    b. **Male** – Use if the individual is male.
    c. **Female** – Use if the individual is female.

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1. Add the individual's personal **Website.** This should not be confused with Social Media pages and accounts contained on the **Contacts** tab of the individual constituent record.
2. Add the individual's **Birth place** if known.
3. The **Alternate Lookup Type** can be added to the record to assist in finding the individual from the Constituent search. Available Alternate Lookup Types include:
    a. **Char MasterID** - System assigned number that is useful for IT development only.
    b. **EDW** - ID number from constituent records in the University Electronic Data Warehouse.
    c. **FACTSID** - ID Number from the advancement database known as FACTS, active from the early 1990s until retirement Nov. 2015.
    d. **FACTSLogon** - User Logon to the FACTS advancement system.
    e. **Grants and Contracts** - ID number assigned to constituent records in the University Grants and Contracts System.
    f. **Merged TED ID** - TED Lookup ID of a deleted record whose data contents were merged into the active TED record. Records with a duplicate in the system are merged.
    g. **Paciolan – DIA** - ID Number assigned to records in the Pacioloan Database used by Urbana Athletics for ticketing and other purposes.
    h. **Paciolan – Krannert** - ID Number assigned to records in the Pacioloan Database used by Urbana Krannert Center for the Performing Arts
    i. **Ticker** - ID number assigned to Corporate Stock Ticker.
    j. **UIAN** - ID Number Assigned to University of Illinois Alumni Magnet System.
    k. **UIF Security ID** - ID Number assigned to University of Illinois staff with access to any UIF Advancement related systems.
    l. **UIN** - University ID Number assigned to all University of Illinois System employees and students.
    m. **Vet Med ID – Chicago** - ID Number assigned to Urbana Veterinary Medicine Database (Chicago Based) clients.
    n. **Vet Med ID – Urbana** - ID Number assigned to Urbana Veterinary Medicine Database (Urbana Based) clients.
4. Add the **Alternate Lookup ID** or the identification number associated with the Alternate Lookup ID Type that has been selected.

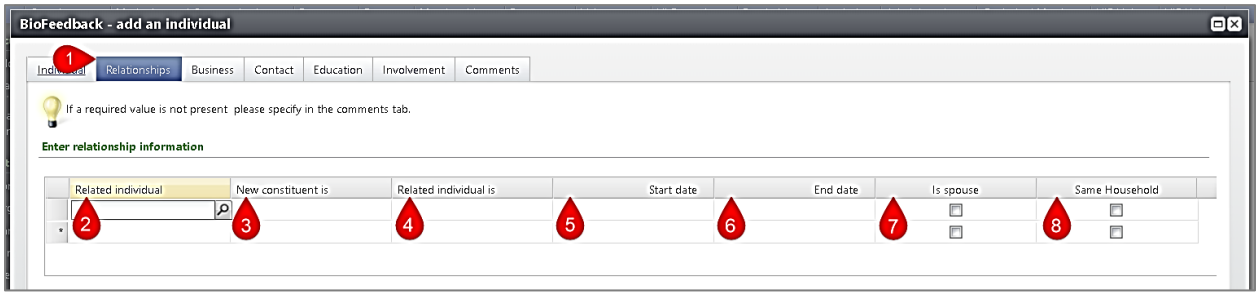
Once the required fields have been added move through the rest of the window adding what information is possible. Before the request for the new record can be made add at least one piece of contact information to the Contact tab of the window.

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Relationships Tab

Complete the Relationships tab if the individual that is being added has a significant relationship with another individual constituent already in the system. **This does not include spousal relationships.** Spousal relationships are added after both individual constituents have records in the TED system. This is not a required tab.



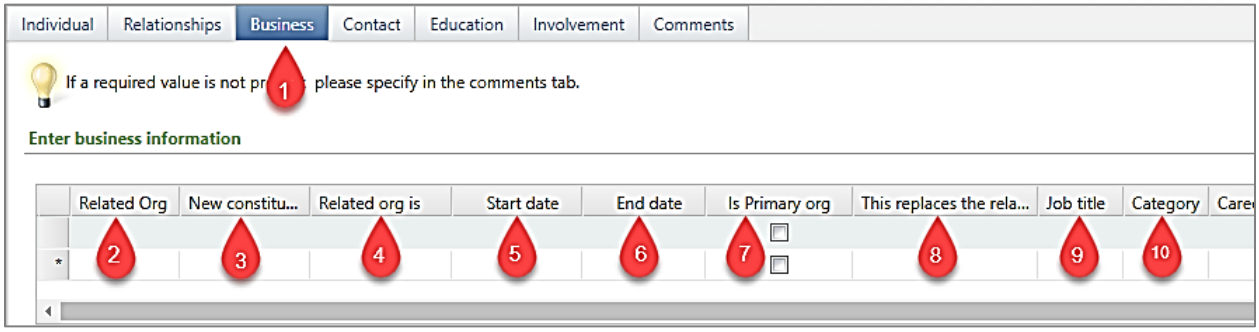
1. Begin on the **Relationships tab** of the Biofeedback – add an individual window.
2. Use the magnifying glass to open a search window to find the **Related individual** to whom the new individual has a relationship. The related individual must be in the TED database in order to be added to this part of the form.
3. Select the type of relationship the two individuals have using the drop-down in the **New constituent is** field. This will not auto-populate the **Related individual** field. Use the values in the Relationships Table Value and Definitions documentation to identify the associated relationship.
4. Select the type of relationship the two individuals have using the drop-down in the **Related individual Is** field. This will not auto-populate from the **New constituent is** field. Use the values in the Relationships Table Value and Definitions documentation to identify the associated relationship.
5. Add the **Start date** that most closely identifies when the relationship began, if known.
6. Add the **End date** that most closely identifies when the relationship ended, if known. This field may be left blank if the relationship is currently active.
7. DO NOT select the **Is Spouse** check box. Selecting this option will not complete the necessary tasks to create a spousal relationship between the two individuals in TED.
8. DO NOT select the **Same Household** check box. Household records are limited to either a single individual or the individual and his/her spouse. Adding the individual constituent to the same household will not complete the necessary tasks to create the spousal relationship between the two individuals in TED.

Business Tab

Complete the Business tab if the individual has an employment or non-employment relationship with an organization. This is not a required tab.

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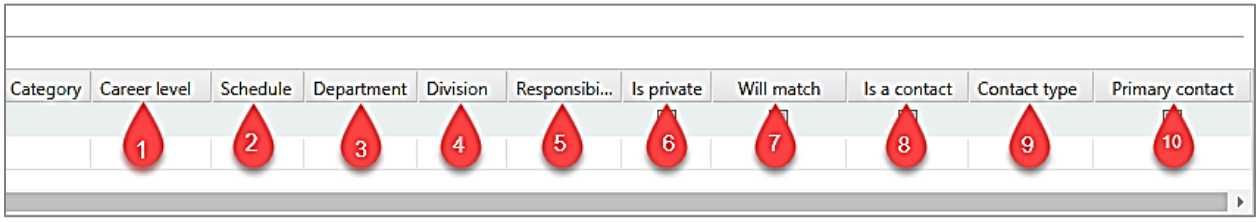
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1. Begin on the **Business** tab of the Biofeedback – add an individual window.
2. Use the magnifying glass in the **Related Org** field to open a new search window. Add the name of the organization to which the new individual constituent has a relationship. The related organization must be in the TED database in order to be added to this part of the form.
3. Select the relationship type from the drop-down in the **New constituent is** column to indicate the type of relationship between the individual and the organization. See the Relationships Table Values and Definitions section for additional information.
4. Select the relationship type from the drop-down in the **Related org is** column to indicate the type of relationship between the individual and the organization. See the Relationships Table Values and Definitions section for additional information.
5. Add the **Start date** that most closely identifies when the relationship began, if known.
6. Add the **End date** that most closely identifies when the relationship ended, if known. This field should be left blank if the relationship is currently active.
7. If the **Is Primary org** checkbox is selected the organization will be marked at the Primary business for the individual. An individual constituent can only have one Primary organization relationship.
8. Thi**replaces the relationship with** drop-down replaces one business relationship with another. Selecting this option will end date the relationship with the organization being replaced.
9. Add the individual's **Job title.** This should be the complete job title, not an abbreviation.
10. Choose a job **Category** from the choices based on the Bureau of Labor Statics job categories. The Standard Occupational Classification (SOC) system is a product of the US Department of Labor's Bureau of Labor Statistics and classifies workers by occupational category. The last code revision occurred in 2018. When used effectively in TED, the SOC codes provide additional options for identifying and prioritizing prospects. For example, filling out the Job category field with the appropriate SOC code makes it easier to identify pools of possible high net-worth individuals and other prospects who may not be accurately rated. For more information about SOC codes visit the official SOC website at https://www.bls.gov/soc/2018/major_groups.htm or the O*NET Online website at https://www.onetonline.org/.

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1. Add the individual's **Career level** from the drop-down menu.
    a. **Executive** – Use if the individual has an executive level position with the organization.
    b. **Unknown** - Use if the individual's career level is unknown.
2. If the individual is anything other than a full-time employee, add his/her **Schedule** from the drop-down menu.
    a. **Part-Time** – Use if the individual is a part-time employee of the organization.
    b. **Retired** – Use if the individual is retired.
    c. **Temporary** – Use if the individual's position with the organization is temporary.
3. You may choose to enter a **Department** name for the employee if known. The Department and Division fields often work hand in hand. For instance, the division and department fields may be used for employees of colleges and universities. For example, Prof. Brian Dolber (10673522) is a professor of communication at California State University, San Marcos. Prof. Dolber's college (Humanities, Arts, Behavioral and Social Sciences) can be entered in the division field, while his department (Communication) goes in the department field.
4. You may choose to enter a **Division** name for the employee if known. Another example: Mr. Stuart "Stu" Levenick (11449222) retired from Caterpillar, Inc. in 2014. Mr. Levenick held several positions during his long career with Caterpillar, including executive positions with a variety of Caterpillar divisions. His last position was as the Group President of the Customer and Dealer Support Division. All these facets of Mr. Levenick's employment history – his executive status, job category, career level, schedule, and division – can be tracked accordingly in this field. Again, it is not necessary to create a new organization record for the Caterpillar Customer and Dealer Support Division. In Mr. Levenick's case, his employment is tied to the primary organization record, with the division noted in the corresponding field.
5. You may choose to enter job **Responsibilities** for the employee if known. The responsibilities field is only used in exceptional circumstances when the nature of the prospect's employment is not sufficiently captured in the other fields of the employment history section. For example, Mr. Mark Steinberg (11326127) is a Partner with Excel Sports Management in its Professional Golf Division. None of these fields reflect a significant aspect of Mr. Steinberg's employment: that he is Tiger Woods' manager. The responsibilities field can be used to enter important information like this. While it is also possible to use the comments box in the employer relationship field, this information will only surface by clicking the double arrows. Information entered in the responsibilities field will surface clearly alongside other fields entered in the employment history.

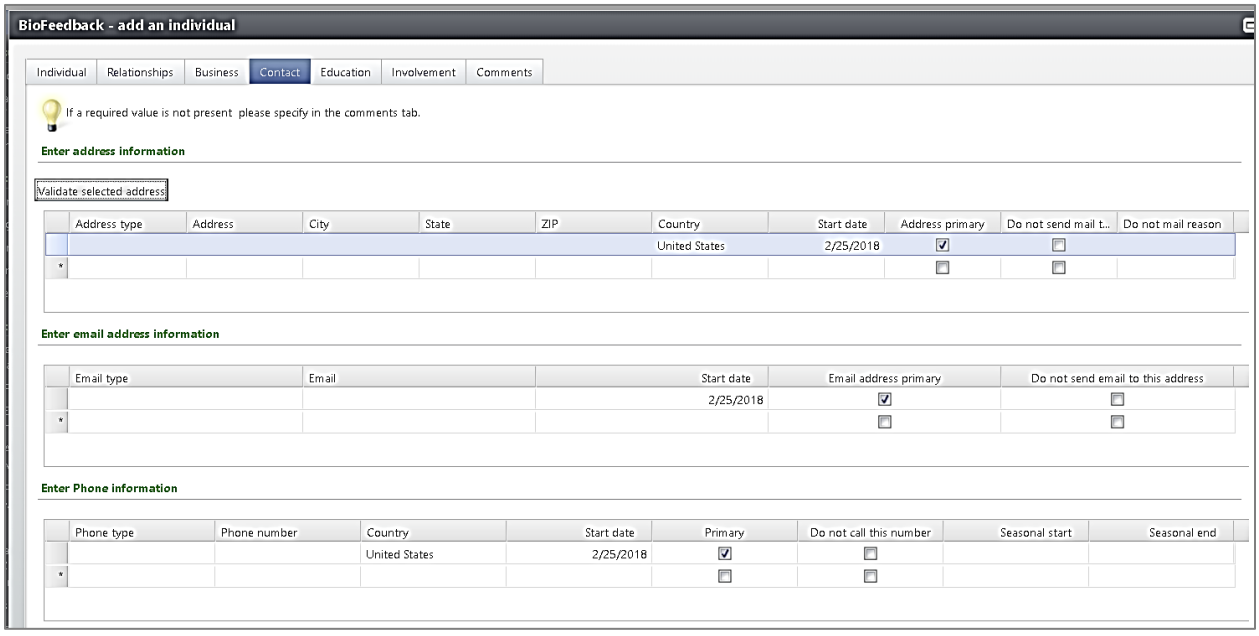
An individual's current area of focus, specialty, or residency should not be added to the Responsibilities field. This information is added to the Specialties section of the Personal Information tab after the individual constituent record has been created.

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6. While all information in TED is confidential, marking a relationship as **Is private** checkbox further indicates the information should be kept confidential. Selecting this option does not keep the information from surfacing in ad-hoc list requests, mass communications, or segmentation.
7. The **Will match** checkbox should not be selected. If the organization will match a constituent's donations the UIF Gift Processing department will add this information.
8. The **Is a contact** checkbox works in conjunction with the **Contact type** field in two ways. First, when the individual is marked as a contact, all contact information from the organization record is automatically added to the Individual constituent's Contact tab as a Business contact type. Secondly, it automates the updating of this employee's contact data in the future if the organization changes contact data.
9. Select the **Contact type** from the available drop down. This will indicate the type of contact the individual is for the related organization. Choose **Employee** if he/she works at this organization location. If the physical location of where he/she works is unknown, mark the contact type as **Unknown Location**.
10. Marking an individual as a **Primary contact** will replace any other individual constituent that was previously marked as the main contact, or Primary contact, for that organization. The Primary contact displays in the Contacts Summary tile with a green checkmark next to that person's name. It also displays on the **Relationship** tab in the **Type** column indicating the individual as the Primary contact. There can only be one Primary contact per organization record.

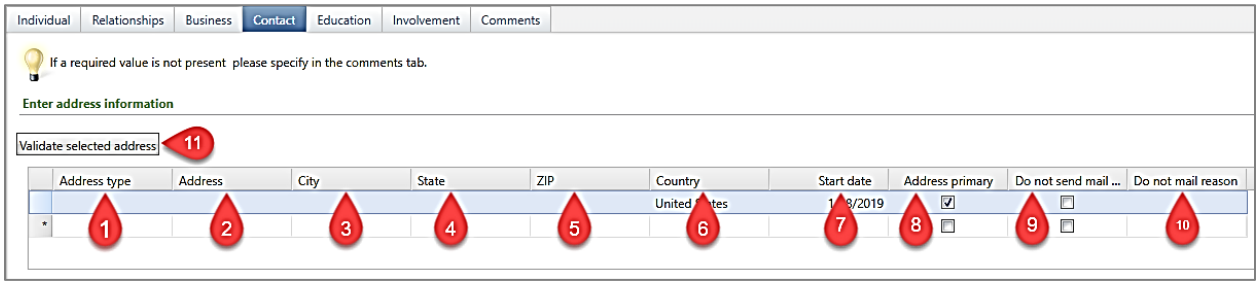
Contact Tab



For a new individual record to be created it must contain at least one piece of contact information. This can be address, email, or phone contact data. Fill in what you know and leave any unknown fields blank. This is a required tab.

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Address Type



1. The **Address type** is a required field when entering address contact information. Address types include:
    a. **Residence** – The individual's physical street home address.
    b. **Business** – The individual's physical street business address.
    c. **Residential Mailing** - Another home address where the individual wants to receive mail - like a PO Box.
    d. **Business Mailing** - Another business address where the constituent wants to receive mail - like a PO Box.
    e. **Partial Business** - Only a partial business address is available (i.e. works somewhere in Louisiana but that's all we know).
    f. **Matching Gift Program** - Street address of the department or division of an organization that focuses on the organization's matching gift program.
    g. **Receipt Address** - Only Gift Processing or Gift Admin should add this Address type. It is added when the receipt address is different than the residence or business or when the actual Address type is not known. The actual receipt process looks at what address is marked as primary, so if there is a receipt address on the system but it is not marked primary then the receipt will not go there.
    h. **Relative** - These entries come from Student and Grad loads and signify an address of a relative of the student/grad (typically the guardian listed in Banner).
    i. **Human Resources** - This type would only be used on a business and signifies the Human Resources Department.
    j. **Partial Resident** - Only a partial home address is available (i.e. lives somewhere in Louisiana but that's all we know)
2. Add the street **Address** associated with the Address type.
3. Add the **City** associated with the street address for this Address type.
4. Add the **State** associated with the street address for this Address type.
5. Add the **ZIP** associated with the street address for this Address type.
6. Add the **Country** associated with the street address for this Address type.
7. Add the **Start date** for when the individual began using the street address for this Address type.
8. Check the **Address primary** to mark this address as the individual's primary address. The primary address is added to communication lists for marketing and segmentation purposes.
9. Use the **Do not send mail to this address** to indicate that the specific address selected is not to

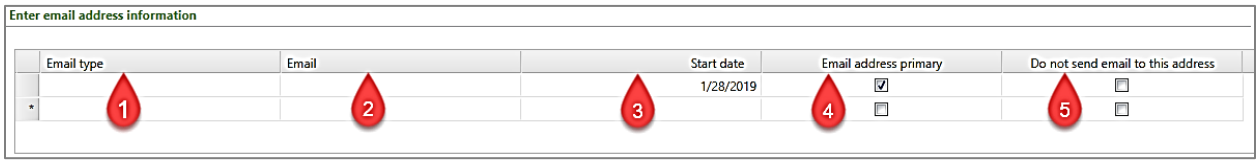
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be used for mailing purposes.

10. Add the **Do not mail reason** to explain why the address should not be used for mailing purposes. Select the reason from the drop-down menu.
    a. **Campus Address** – Campus Addresses should not receive promotional or solicitation materials.
    b. **Constituent Request** – An individual may request to not receive communications at a specific address for a variety of reasons. The address is still valid but should not be used.
    c. **Former** – All contact types are required to have a primary address. When an address is no longer in use, but there is no other address for the individual, the address cannot be end dated. It must be marked Do Not Mail with the Former reason code.
    d. **Incomplete Address** – When the Address type is Partial Business or Partial Resident, add a Do Not Mail Flag to the address using the Incomplete Address drop-down reason. This further indicates that the address is incomplete in some way.
    e. **Internal Request** – An address can be marked Do not mail by someone from the unit, foundation, or a gift officer.
    f. **Unknown** – If the communication was returned with no additional information mark the address with a Do Not Mail flag with the reason Unknown.
11. Use the **Validate selected address** option to validate the currently selected address in the "Enter Address Information" area. It is important to attempt to validate the address for proper formatting. If an address does not validate, as long as the address is properly formatted, it is acceptable to leave the address unvalidated.

Email Type

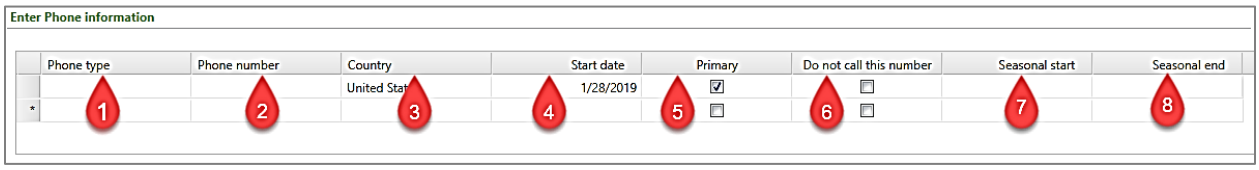


1. The **Email type** is a required field when entering email address contact information. Email types include:
    a. **Personal** - Any email address the individual is using for personal reasons.
    b. **Business** - Any email address the individual uses solely for business reasons. This address should be the address given to the individual by his/her place of employment.
    c. **Campus** – Any email address associated with the University of Illinois System.
    d. **Assistant** – An individual may request that any communication go to his/her assistant for review and response.
2. Add the **Email** address associated with this Email type.
3. Add the **Start date** associated with this Email type. If the start date is unknown add the date the email address information became available.
4. Select **Email address primary** if this is the individual's primary email address. The primary email address is added to communication lists for marketing and segmentation purposes.
5. Select the **Do not send email to this address** option to prevent the specific email address from

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being used for email communication purposes.

Phone Type



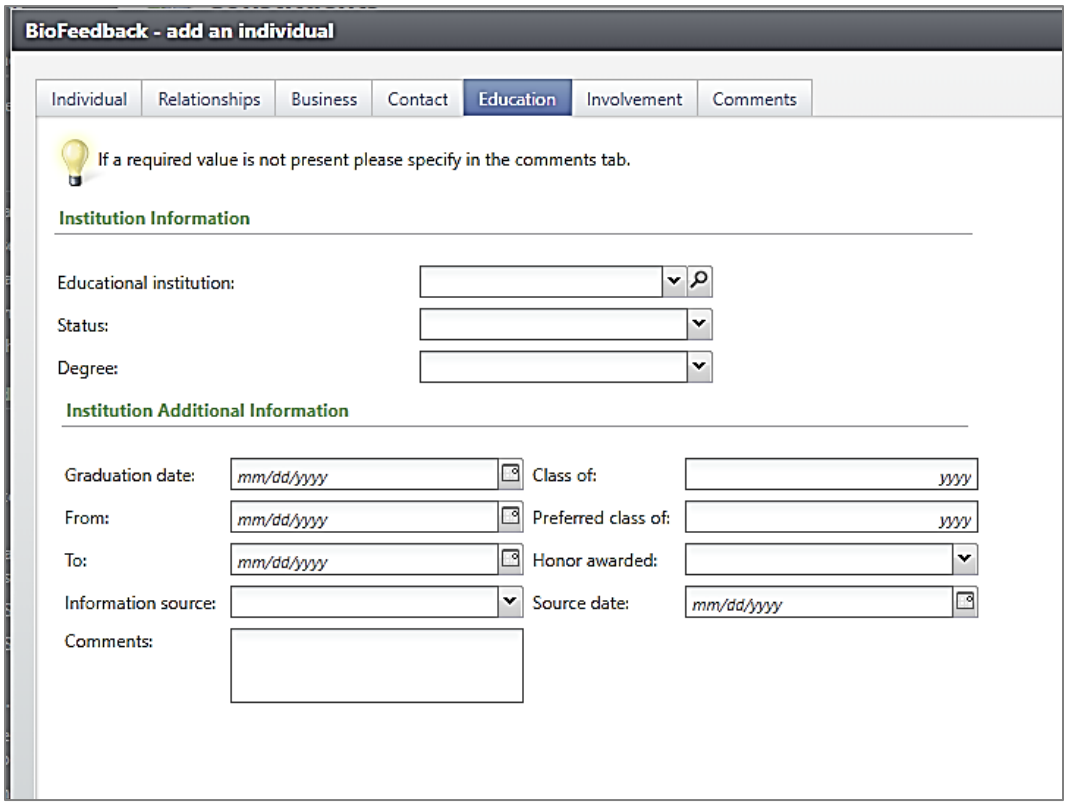
1. The **Phone type** is a required field when entering phone contact information. Phone types include:
    a. **Home –** The phone number to the individual's residence.
    b. **Personal Cell** – The individual's personal cell phone number.
    c. **Home Fax** – The individual's personal fax number.
    d. **Business –** The number to the individual's direct line at his/her place of business.
    e. **Business Cell –** The number to the individual's business cell phone. Business cell phones can be added or updated directly on the individual constituent's record.
    f. **Business Fax -** The number to the individual's business Fax machine. Business fax numbers can be added or updated directly on the individual constituent's record.
    g. **Assistant** – An individual may request that any communication go to his/her assistant for review and response.
    h. **Relative** – The individual may choose to receive communications at a relative's residence**.**
    i. **Campus** – Any phone number associated with the campus.
2. Add the **Phone number** associated with this Phone type. Include the area or country code as necessary.
3. Add the **Country** associated with the Phone type.
4. Add the **Start date** associated with this Phone type. If the start date is unknown add the date the phone number became available.
5. Select **Primary** if this is the individual's Primary phone number. The Primary phone number is added to communication lists for marketing and segmentation purposes.
6. Select the **Do not call this number** option to prevent the specific phone number from being used for contacting the individual.
7. If the phone number is only used during part of the year add the **Seasonal start** date. This is the month of the year this phone number begins to be used.
8. If a Seasonal start date has been added a **Seasonal end** date must be added. If a seasonal date is added to the phone number, there must be a corresponding date on another phone number in the system. Also, seasonal dates are never 1/1 – 12/31.

Note: Each month, a list of phone numbers will be sent to RealPhoneValidation, a vendor we use to identify if phone numbers are cellular lines, landlines, or are no longer active. The information we get back will be used to keep phone types accurate in TED.

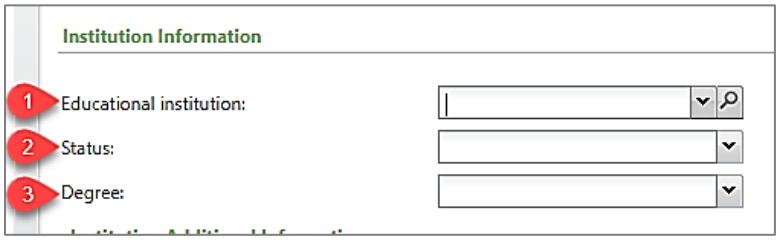
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Education Tab



This tab allows you to add degree or education information. This is not a required tab. Begin by adding the Institutional Information.

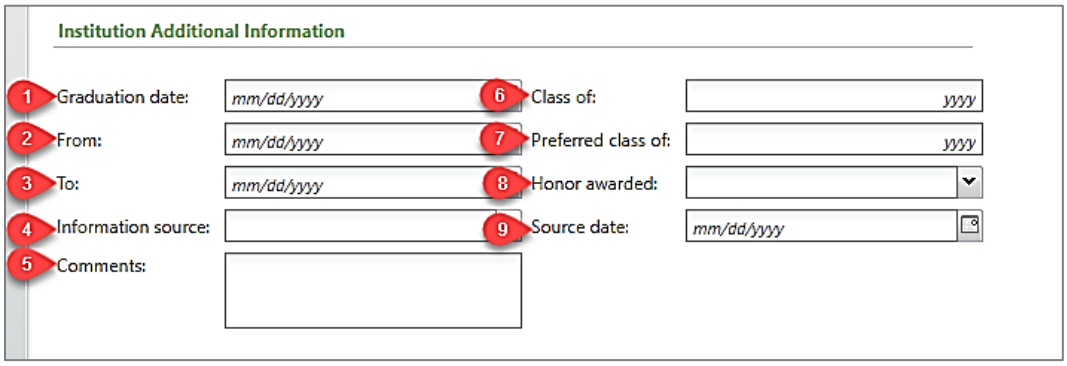


1. Search for the **Educational institution** the individual attended using either the drop-down menu for a University of Illinois campus or the magnifying glass for a non-University of Illinois institution. When searching search by city and state or by name using the % wildcard (Ex: Searching for **%Wisconsin%** would result in locating "Univ of Wisconsin-Madison").
2. Add the individual's current educational **Status** from the dropdown. Possible values include:
    a. **Unknown** – Use if the individual's status with the institution is not certain.
    b. **Currently attending** – Use if the individual is actively attending the institution.
    c. **Incomplete** – Use if the individual is not currently enrolled and did not complete graduation with the institution.
    d. **Graduated** – Use if the individual has graduated from the institution.
3. Add the type of **Degree** for this educational data. The drop-down menu is specific to University of Illinois degree types. If it is not a UI degree, select the most closely related degree type and

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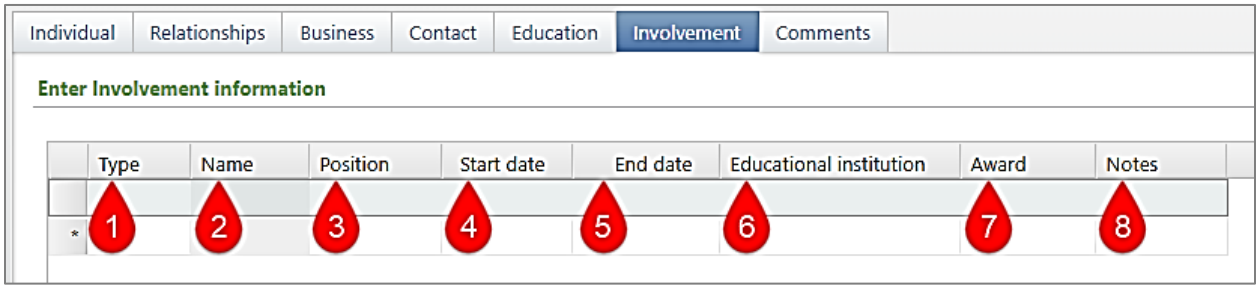
add the degree name to the **Comments** field below.

Any request to add or edit University of Illinois degrees will be confirmed with registrar's office at the appropriate campus.



1. Add the individual's **Graduation date** if applicable and known.
2. Add the starting date of this educational data in the **From** field.
3. Add the ending date of this educational data in the **To** field.
4. The **Information source** should include the where and how this information was found. While the Information source is not required it should be added whenever available.
5. Add any additional comments, such as the degree name in the **Comments** field.
6. The **Class of** field is the most recent class year of this individual's educational data for this institution.
7. The **Preferred class of** field should be populated with the individual's preferred class year with this educational institution. For example, a person completing a doctoral degree may prefer to be associated with the class of his/her undergraduate degree.
8. Add any additional honors associated with this educational data to the **Honor awarded** field.
9. The **Source date** works with the Information source and should include the date the information was found.

Involvement Tab



The Involvement tab is completed with information on the individual's educational involvement at the University of Illinois that is not contained in the degree information. This is not a required tab.

1. Select the educational involvement **Type** from the drop-down menu. Possible values include:

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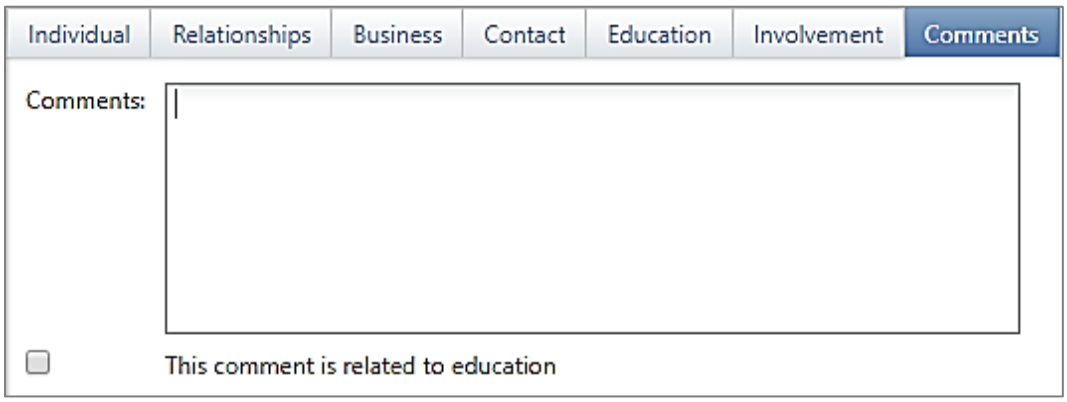
a. **Alternative Study** - Educational Involvement “Alternative Study” data entries may or may not be associated with the student’s/graduate’s UI academic program of record.
b. **Course** - Educational Involvement “Course” data entries refer to courses the individual completed that may or may not be associated with the student’s UI academic program of record.
c. **Emphasis** - Educational Involvement data entries under “Emphasis” can be associated with any higher education institution the individual attended.
d. **Exchange Student** - Educational Involvement “Exchange Student” data entries are used to identify individuals who took part in a student exchange program at any university.
e. **Other Certificate** - Educational Involvement “Other Certificate” identifies certificates that do not come through the Banner Grad Transfer import process.
f. **Student Type** - Educational Involvement data entries under “Student Type” can be associated with any higher education institution.
g. **Studies Program** - Educational Involvement “Studies Program” data entries can be associated with any university, and in some cases track UI academic information that is currently built into the Banner degree program code, but pre-banner was tracked separately.
h. **Study Abroad** - Educational Involvement “Study Abroad” data entries can be used to identify individuals who were part of a study abroad program.
i. **Thesis/Dissertation Topic** - Educational Involvement “Thesis/Dissertation Topic” can be used to identify master’s and Ph.D. thesis and dissertation projects.

2. The **Name** field drop-down menu updates depending on the involvement type selected.
3. The **Position** field is not being used.
4. In the **Start date** field add the date the involvement began.
5. In the **End date** field add the date the involvement ended.
6. Any college or university in the table can be added as the **educational institution** where the involvement took place.
7. The **Award** field is not being used.
8. The **Notes** field should be used to further identify information not included under the involvement type. Examples could be the dissertation or thesis title, or the specialty or concentration not listed in the degree code.

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Comments Tab



This tab is for you to enter any information that does not have a proper place on the form. This section will be reviewed by UIF Advancement Information Management & Support and entered on the individual record in the proper location. This is not a required tab.

1. The **Comments** box allows you to enter free-form comments about the record you are requesting be created. You may also add any information that does not have an appropriate place on the other tabs on this form.
2. Include the constituent's affiliation with the university to provide a reason for creating the record, as well as aid in coding the record to appear in your unit's reports and communications. Also include any special circumstances or notes, such as marriage, etc.
3. The **This comment is related to education** check box is not currently being used and does not influence the data submitted.

***Note*: Any information submitted in the Comments tab that has a field elsewhere on the form WILL NOT be processed.**

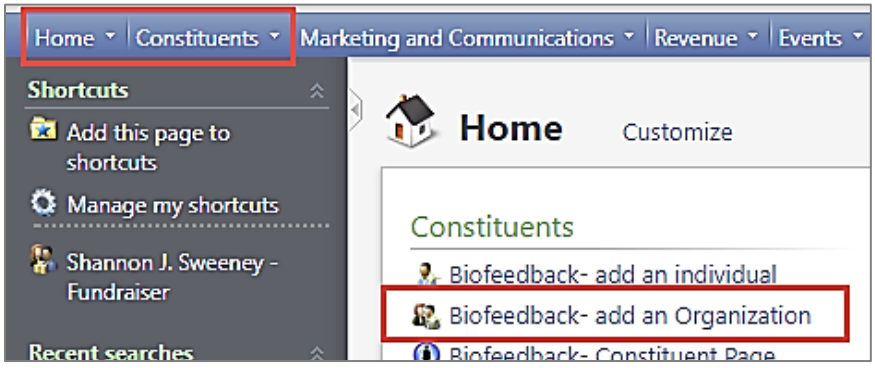
Requesting a New Organization Record

Every individual or organization has a unique record in TED. To request a new organization record be created use Biofeedback – add an organization option found on the Home menu or the Constituents menu. It is important to fill in as much information as possible on the form. The minimum amount of information required for a new record to be created is the organization's legal name, or the doing business as (DBA) name, and a piece of contact information.

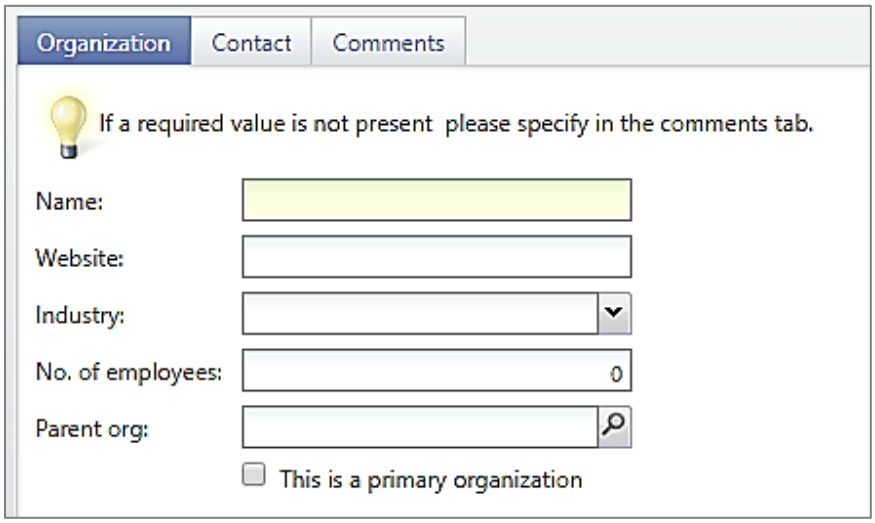
Begin on either the **Home** or the **Constituents menu**.

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Select the **Biofeedback – add an Organization option**. This will open the Biofeedback – add an Organization window.

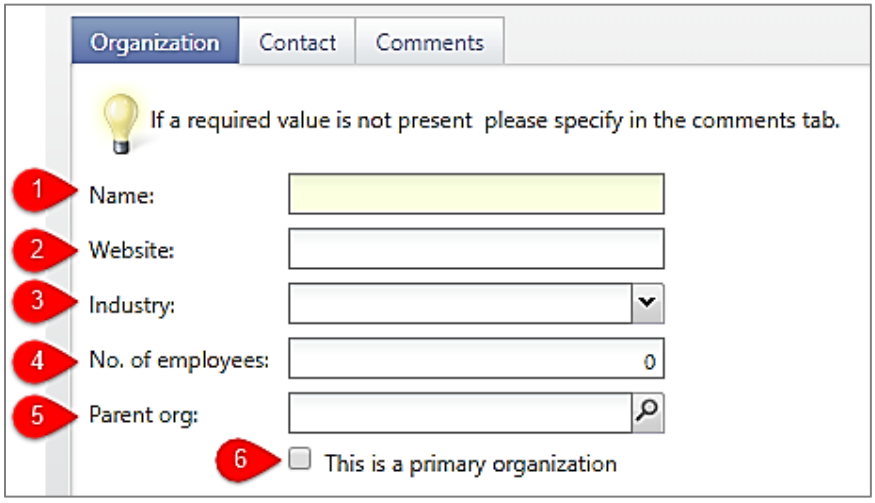


Organization Tab

This tab contains all the name & demographic information for the new organization record. Fill in all the fields you know and leave the rest blank.

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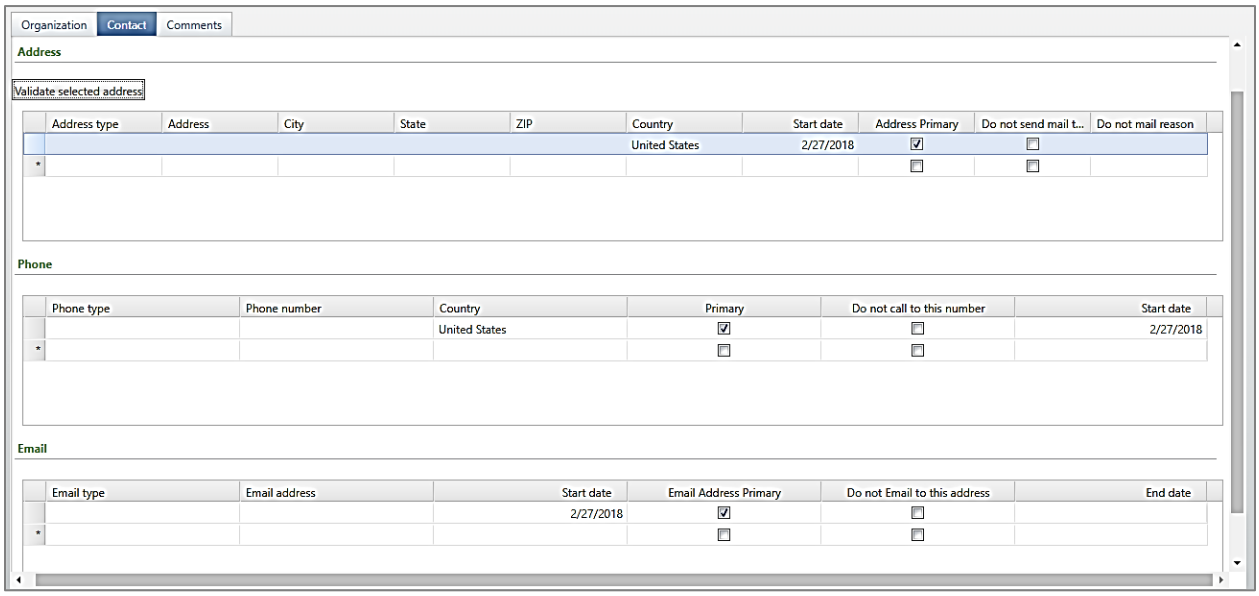


1. Enter the legal or the DBA (Doing Business As) **Name** of the organization for which a record should be created. This is a required field.
2. Enter the organization's official **website.**
3. Use the drop-down menu to add the organization's **Industry** code. The drop-down list is populated by the North American Industry Classification System code. The UIF Research and Portfolio Management team refers to D&B Business Browser (formerly One Source) to obtain current codes (from 2012). NAICS made a recent update in 2017, so there may be differences in actual NAICS codes versus those on some TED records. Questions regarding Industry codes on Organization records should be directed to UIF Research and Portfolio Management.
4. The **No. of employees** field is left blank.
5. If the organization is a subsidiary add the name of the parent organization to the **Parent org** field to connect the two organizations.
6. Select the **This is a primary organization** check box if the organization is the primary organization, meaning the top of the organizational hierarchy, for this organization.

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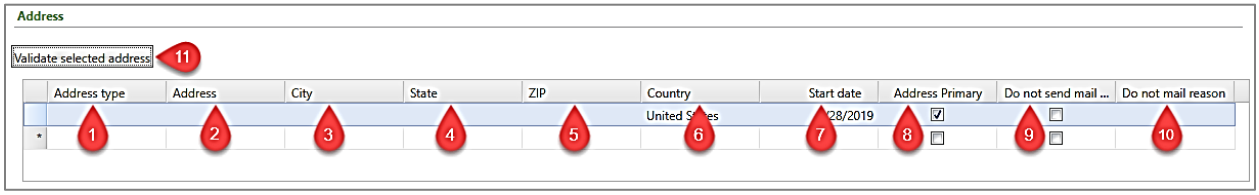
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Contact Tab



For a new organization record to be created it must contain at least one piece of contact information. This can be address, email, or phone contact data. Fill in what you know and leave any unknown fields blank.

Address Type



1. The **Address type** is a required field when entering address contact information. Address types include:
    a. **Residence** – An individual constituent's physical street home address. This option should not be used for an organization record.
    b. **Business** – The organization's physical street business address.
    c. **Residential Mailing** - Another home address where an individual wants to receive mail - like a PO Box. This option should not be used for an organization record.
    d. **Business Mailing** - Another business address where an organization has requested to receive mail - like a PO Box.
    e. **Partial Business** - Only a partial business address is available (i.e., works somewhere in Louisiana but that's all that is known).
    f. **Matching Gift Program** – Street address of the department or division of an organization that focuses on the organization's matching gift program.

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g. **Receipt Address** - These are no longer being used and will be phased out and removed from records.
h. **Relative** - These entries come from Student and Grad loads and signify an address of a relative of the student/grad (typically the guardian listed in Banner). This option should not be used for an organization record.
i. **Human Resources** - This type would only be used on a business and signifies the Human Resources Department.
j. **Partial Resident** - Only a partial home address is available of an individual constituent (i.e., works somewhere in Louisiana but that's all we know). This option should not be used for an organization record.

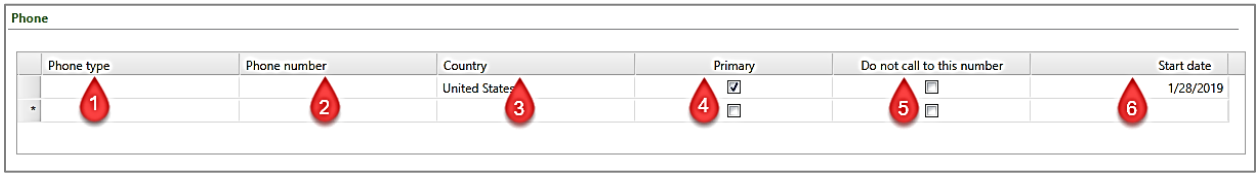
2. Add the street **Address** associated with the Address type.
3. Add the **City** associated with the street address for this Address type.
4. Add the **State** associated with the street address for this Address type.
5. Add the **ZIP** associated with the street address for this Address type.
6. Add the **Country** associated with the street address for this Address type.
7. Add the **Start date** for when the organization began using the street address for this Address type. If unknown, today's date can be used.
8. Check the **Address Primary** check box to mark this address as the organization's Primary address. The Primary address is added to communication lists for marketing and segmentation purposes.
9. Use the **Do not send mail to this address** check box to indicate that the specific address selected is not to be used for mailing purposes.
10. Add the **Do not mail reason** to explain why the address should not be used for mailing purposes. Select the reason from the drop-down menu.
    a. **Campus Address** – Campus Addresses should not receive promotional or solicitation materials.
    b. **Constituent Request** – An organization may request to not receive communications at a specific address for a variety of reasons. The address is still valid but should not be used.
    c. **Former** – All contact types are required to have a primary address. When an address is no longer in use, but there is no other address for the organization, the address cannot be end dated. It must be marked Do Not Mail with the Former reason code. If there is another address for the organization, add that one as primary and then end date the former address.
    d. **Incomplete Address** – When the Address type is Partial Business or Partial Resident, add a Do not mail flag to the address using the Incomplete Address drop-down reason. This further indicates that the address is incomplete in some way and should not be used.
    e. **Internal Request** – An address can be marked Do not mail by someone from the unit, foundation, or a gift officer.
    f. **Unknown** – If the communication was returned with no additional information mark the address with a Do not mail flag with the reason Unknown.
11. Use the **Validate selected address** option to validate the selected address in the address field. It is important to attempt to validate the address for proper formatting. If an address does not

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validate, as long as the address is properly formatted, it is acceptable to leave the address unvalidated.

Phone Type



Phone numbers added to an organization record must be a generic phone number for the entire organization, division, or department not an individual employee's phone number. This is the organization's primary phone number. If a generic phone number is unavailable this contact type should not be used and either the email address or the street address for the organization should be added as contact information.

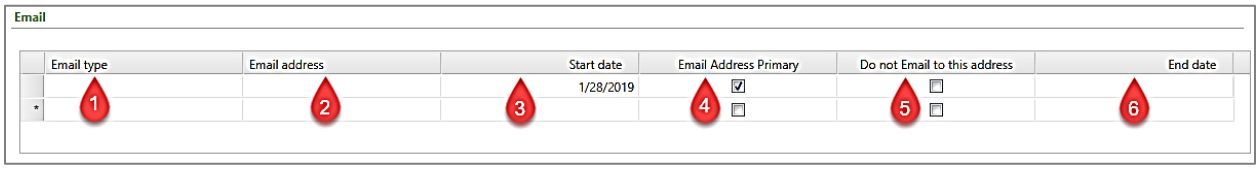
1. The **Phone type** is a required field when entering phone contact information. Phone types include:
    a. **Home –** The phone number to an individual constituent's residence. This option should not be used for an organization record.
    b. **Personal Cell** – The individual constituent's personal cell phone number. This option should not be used for an organization record.
    c. **Home Fax** – The individual constituent's personal fax number. This option should not be used for an organization record.
    d. **Business –** The number to the organization's main or subsidiary office. This should not be a specific individual's direct line.
    e. **Business Cell –** The number to an individual constituent's business cell phone. This should not be a specific individual's cell phone number. This option should not be used for an organization record.
    f. **Business Fax -** The number to an individual constituent's business fax machine. This should not be a specific individual's fax line. This option should not be used for an organization record.
    g. **Assistant** – The number to an individual constituent's assistant. This option should not be used for an organization record.
    h. **Relative** – The number to an individual constituent's relative**.** This option should not be used for an organization record.
    i. **Campus** – Any phone number associated with the campus. This option should not be used for an organization record.
2. Add the **Phone Number** associated with this Phone type. Include the area or country code as necessary.
3. Add the **Country** associated with the Phone type.
4. Select the **Primary** check box if this is the organization's Primary phone number. The Primary phone number is added to communication lists for marketing and segmentation purposes.
5. Select the **Do not call to this number** check box to prevent this specific phone number from being used for contacting the organization.

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6. Add the **Start date** associated with this Phone type. If the start date is unknown add the date the phone number became available.

   Note: Each month, a list of phone numbers will be sent to RealPhoneValidation, a vendor we use to identify if phone numbers are cellular lines, landlines, or are no longer active. The information we get back will be used to keep phone types accurate in TED.

Email Type



Email addresses added to an organization record must be a generic email address for the entire organization, division, or department not an individual employee's email address. This is the organization's primary email address. If a generic email address is unavailable this contact type should not be used and either the phone number or the street address for the organization should be added as contact information.

1. The **Email type** is a required field when entering email address contact information. Email types include:
   a. **Personal** - Any email address an individual constituent is using for personal reasons. This option should not be used for an organization record.
   b. **Business** – An email address to the general organization not to a specific individual in the business. If there is no general email address do not use this Contact type.
   c. **Campus** – Any email address associated with the University of Illinois system. This option should not be used for an organization record.
   d. **Assistant** – An individual constituent may request that any communication goes to his/her assistant for review and response. This option should not be used for an organization record.
2. Add the **Email** address associated with this Email type.
3. Add the **Start date** associated with this Email type. If the start date is unknown add the date the email address information became available.
4. Select the **Email Address Primary** check box if this is the organization's Primary email address. The Primary email address is added to communication lists for marketing and segmentation purposes.
5. Select the **Do not Email to this address** check box to prevent this specific email address from being used for email communication purposes.
6. Add the **End date** associated with this Email type if appropriate. When requesting a new organization record using the email address contact type, the email address should be active.

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Comments Tab



1. Enter any information that does not have a proper place in the other tabs within this form. This tab is reviewed and entered on the constituent record in the proper location.
2. Include the constituent's affiliation with the university to provide a reason for creating the record, as well as aid in coding the record to appear in your unit's reports and communications. Also include any special circumstances or notes, such as marriage, etc.

***Note*: Any information submitted in the Comments tab that has a field elsewhere on the form WILL NOT be processed.**

Bulk Record Creation Request

Bulk record creation is possible. Bulk requests can be made for either individual or organization records, but not both at the same time. Spreadsheets formatted according to the templates below can be submitted via ticket through UIF Support, UIF's ticketing system by selecting 'Data Services' for the Category, 'I have a list/need an update' for the Type, and 'External Database: LOAD' for the Item drop downs.

Individual Records

Template: http://publicfiles.uif.uillinois.edu/TED_ExternalDatabaseTemplate.xlsx

Each data point must be in a separate column in the spreadsheet. The following information is required. Fill in any other fields for which you have information for. The more information, the better.

- Title
- First name
- Last name
- Contact Type (ie. Residence, Business)
- Contact Information

Organization Records

Each data point must be in a separate column in the spreadsheet.

- Organization Name

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- Contact Type
- Contact Information
- Indicate Parent or Child if necessary. If indicating, it is a child organization include the name of the Parent organization.

Time Frame

The time frame for record creation is based on the number of records requested and if the required information is included.

- 100 or less 3 weeks
- 100-499 6 weeks
- 500-999 2 months
- 1,000-4,999 3 months
- 5,000+ 5 months

REVIEWED 7/30/24

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CONSTITUENCIES OVERVIEW

DEFINITION AND USES

This document serves as an aid for the various processes involved in assigning constituencies. Constituencies are used to classify and organize the affiliation(s) that a constituent has with your unit. Depending on their specific affiliation, a constituent could potentially be associated with several constituencies; for example, a University of Illinois graduate who has given a gift will be classified under **Prospect**, **Graduate**, and **Donor.**

Constituencies are listed in the summary of a constituent record (in the upper left-hand corner) and appear in either blue or black. Constituencies that appear in blue serve as links to additional pages, those in black do not link to additional screens. Constituencies are assigned to individual constituents in one of two ways. Some constituencies are automatically assigned by the system based on previously entered information, while others are updated through overnight processing. The latter is accomplished through the dual use of a selection and the Ad Hoc Query Tool.

Note – Refer to the Affiliation Guide for information about the calculation of affiliation scores.

Advancement Purpose

Constituencies are used to classify and organize the affiliation(s) that a prospect has.

Query Nodes

Constituents Source View|Constituencies
Constituents Source View|Constituencies (Stored Values)
Constituents BBDW Source View|Constituencies

Constituency Hierarchy for UI Reporting

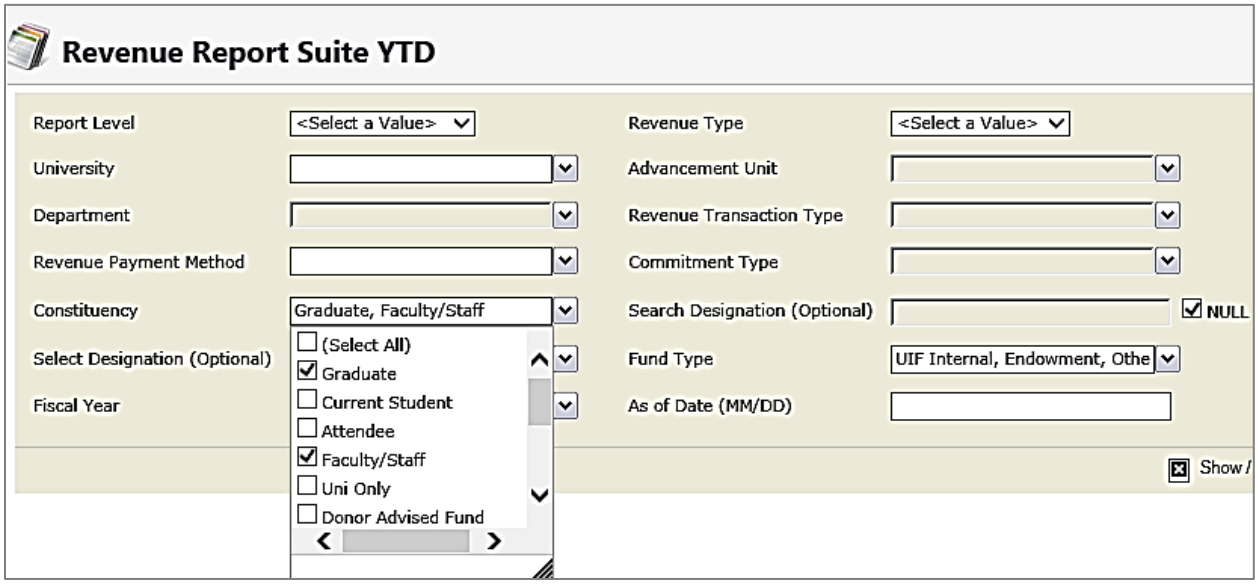
Many constituents have several different constituencies. For UI reporting purposes, if a constituent falls into more than one, this is the order in which they will be included in reports.

Graduate
Current Student
Attendee
Faculty/Staff
Uni Only
Donor Advised Fund
Matching Gift Organization
Corp / Business
Family Foundation
Foundation
Government Entity
Other Organization
Committee
Non-Alumnus

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An example of this is a constituent that has both the graduate and facility staff constituencies. If the report is run for both types, this person will be included in the Graduate constituencies because it is highest in the hierarchy. They can't be included in both segments or the figures would be duplicated.



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Advancement Staff Constituencies

This section details the processes for documenting **Advancement Staff** constituencies.

Advancement Staff

1. New Advancement employee record is added to TED.
2. The **Advancement Staff** constituency is manually added to the TED record when access is set up and appears under **Constituencies** as a link to the "Fundraiser" tab.
3. This is an immediate process and is termed as a standard "out of the box" Blackbaud feature.

Users with the Advancement staff constituency will:

- Appear as a choice in the Organizational Hierarchy
- Appear as a choice on the fundraiser search
- Adds the fundraiser tab to their record
- Gives the user access to the my fundraiser page and prospect page (provided the user account is linked to their constituent record)

Note: The Blackbaud out of the box name for the Advancement Staff constituency is *Fundraiser*. This was a customization UIF made during implementation.

Attendee Constituencies

The **Attendee** constituencies are added by global change processes scheduled to run nightly.

Attendee

1. Constituent has an educational status of "Incomplete" or "Unknown," *not* including UI honorary degrees.
2. Constituent is from one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign).
3. The **Attendee** constituency is added and appears under **Constituencies**.

Committee Constituencies

This section details the processes for documenting **Committee** constituencies.

Committee

1. New Committee is created with the type "UI Involvement" or "External Involvement."
2. The **Committee** constituency is automatically added and appears under **Constituencies.**
3. This is an immediate process and is termed as a standard "out of the box" Blackbaud feature.

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Corp/Business Constituencies

When a new organization constituent record is added, that is a corporation or a Business, UIF Research will manually add the Company constituency. Company will then appear under Constituencies.
This section details the processes for documenting **Corp/Business** constituencies.

Corp/Business

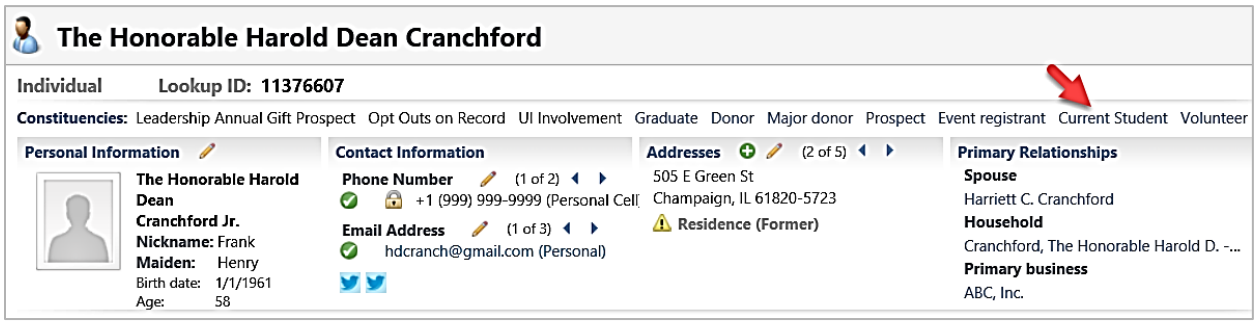
1. A corporation is defined by UIF as a legal entity that is used in a for-profit nature. This designation includes corporations, partnerships, and cooperatives that have been organized for profit-making purposes, including corporations owned by individuals, families, and other closely held companies. A corporation serves as a legal entity created separately from those who own and operate it. This also includes company-sponsored foundations: those created by business corporations and funded exclusively by their companies.

2. **Corp/Business** constituency is manually added by the UIF Research Department – there is no global change that will automatically add this constituency.

Current Student Constituencies

The **Current Student** constituencies are added immediately as degree information with a status of "Currently Attending" on the education history record from one of our three affiliated education institutions, Chicago, Springfield, and Urbana-Champaign, is entered.

This is a standard "out of the box" Blackbaud feature and the Current Student constituency links to the "Education" tab. (Do SS)



Current Student

1. Constituent has an educational status of "Currently Attending" one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign).

2. The **Current Student** constituency is automatically added and appears under **Constituencies** as a link to the "Education" tab.

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Donor Advised Fund Constituencies

When an organization constituent's first recognition credit for a gift with recognition credit type of "Self/Donor Advised" is processed, the Donor Advised Fund constituency is automatically added and appears under Constituencies on the organization's constituent record.

This section details the processes for documenting **Donor Advised Fund** constituencies.

Donor Advised Fund

1. First instance of Donor Advised recognition credit is assigned as a gift from the organization constituent.
2. The **Donor Advised Fund** constituency is automatically added and appears under **Constituencies** on the organization's constituent record.
3. This is a global change process and is scheduled to run nightly.

Event Registrant Constituencies

The **Event Registrant** constituencies are added immediately, and the process is termed as a standard "out of the box" Blackbaud feature.

Event Registrant

1. A constituent is added as an event registrant.
2. The **Event Registrant** constituency is automatically added and appears under **Constituencies** as a link to the "Events" tab.
    a. **Event Registrant** will remain on the constituencies list even after the event takes place.

Event Staff Constituencies

This section details the processes for documenting **Event Staff** constituencies.

Event Staff

1. New Advancement Staff constituency is added.
2. The **Event Staff** constituency is manually added by User Support and appears under **Constituencies** as a link to the "Constituencies" tab.
    a. This only occurs if the employee has TED event related responsibilities, such as adding an event or attending registrants.
3. Should the employee terminate, User Support end dates the constituency.

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External Involvement Constituencies

This section details the processes for documenting **External Involvement** constituencies. The process of adding **External Involvement** constituencies is immediate and is termed as a standard "out of the box" Blackbaud feature.

External Involvement

1. A constituent is added as an active member of a committee with a group type of "External Involvement."
2. The **External Involvement** constituency is automatically added and appears under **Constituencies.**

Faculty/Staff Constituencies

This section details the processes for documenting **Faculty/Staff** constituencies. The following is a global change process and is scheduled to run nightly.

Faculty/Staff

1. New employee added through the University Appointments import process.
2. The **Faculty/Staff** constituency is automatically added and appears under **Constituencies.**

Family Foundation Constituencies

This section details the processes for documenting **Family Foundation** constituencies.

Family Foundation

1. New Family Foundation record is added.
2. The **Family Foundation** constituency is manually added by UIF Research and will appear under **Constituencies.**

Financial Award Recipient Constituencies

The **Financial Award Recipient** constituencies is added by a global change processes scheduled to run nightly.

Financial Award Recipient

1. A constituent is a recipient for any designation purpose.
2. The **Financial Award Recipient** constituency is automatically added and appears under **Constituencies.**

Former Advancement Staff Constituencies

This section details the process for documenting **Former Advancement Staff** constituencies.

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Former Advancement Staff

The **Advancement Staff** constituency is *not* removed from employees that leave employment; **Former Advancement Staff** constituency is added by UIF User Support. The **Former Advancement Staff** constituency is not a clickable link.

Former Faculty/Staff

This section details the process for documenting **Former Faculty/Staff** constituencies. The following process is a global change process and is scheduled to run nightly.

Former Faculty/Staff

1. Terminating employee is removed.
2. The **Faculty/Staff** constituency is automatically removed; the **Former Faculty/Staff** constituency appears under **Constituencies**.

Former Resident/Fellow/Intern Constituencies

The **Former Resident/Fellow/Intern** constituencies are added by global change processes scheduled to run nightly.

Former Resident/Fellow/Intern

1. Active employee's Job Category code is "Fellow, Postdoctoral," "Fellow, Predoctoral," "Postdoctoral Intern," or "House Staff (medical Residents and Interns)."
2. The **Former Resident/Fellow/Intern** constituency is automatically added and appears under **Constituencies**.

Former Student Faculty/Staff Constituencies

This section details the process for documenting **Former Student Faculty/Staff** constituencies. This process is a global change process and is scheduled to run nightly.

Former Student Faculty/Staff

1. Terminating student employee is processed.
2. The **Student Faculty/Staff** constituency is automatically removed; the **Former Student Faculty/Staff** constituency appears under **Constituencies.**

Foundation Constituencies

This section details the processes for documenting **Foundation** constituencies.

Foundation

1. New Foundation constituent record is added.
2. The **Foundation** constituency is manually added by UIF Research and will appear under **Constituencies.**

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Government Entity Constituencies

This section details the processes for documenting **Government Entity** constituencies.

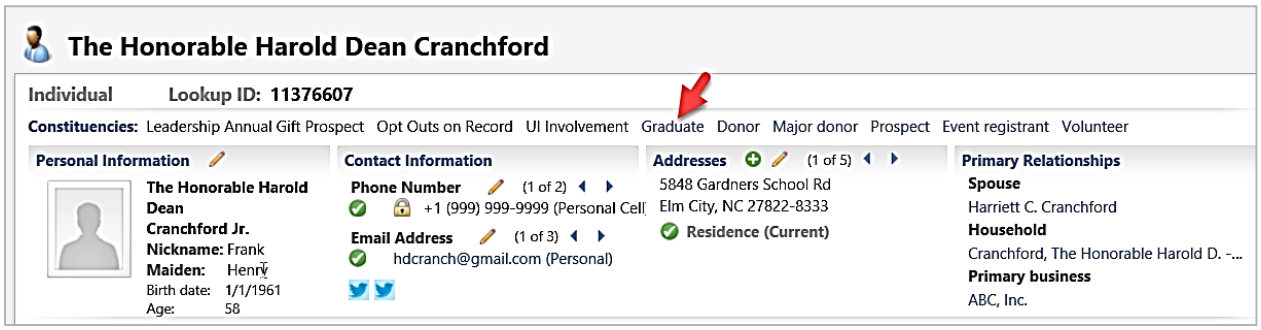
Government Entity

1. New federal, state, or local government entity record is added.
2. The **Government Entity** constituency is manually added by UIF Research and will appear under **Constituencies.**

Graduate Constituencies

The **Graduate** constituencies are added immediately as degree information with a status of "Graduated" on the education history record from one of our three affiliated education institutions, Chicago, Springfield, and Urbana-Champaign, is entered.

This is a standard "out of the box" Blackbaud feature and the Graduate Constituency links to the "Education" tab.



Graduate

1. Constituent has an educational status of "Graduated" from one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign).
2. The **Graduate** constituency is automatically added and appears under **Constituencies** as a link to the "Education" tab.

Inactive Student Constituencies

The **Inactive Student** constituencies are added by global change processes scheduled to run nightly.

Inactive Student

1. Constituent has an education status of "Incomplete" or "Unknown," *not* including UI honorary degrees.
2. Constituent has *not* been enrolled in one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign) over the past two years.
3. The **Inactive Student** constituency is added and appears under **Constituencies**.

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Joint Planned Giver Constituencies

This section details the processes for documenting **Joint Planned Giver** constituencies.

Joint Planned Giver

1. A Planned Gift that has at least one designation and a status of “Accepted” or “Matured” is added to a constituent.
    a. Any other status removes the constituency.
2. When applicable, the “Joint Constituent” attribute (as well as the joint donor) will be manually added by the UIF Trust Services Department.
3. The **Joint Planned Giver** constituency is added and appears under **Constituencies**.
4. This is a global change process and is scheduled to run nightly.

Major Donor Constituencies

The **Major Donor** constituencies are added immediately as a gift is processed and is a standard “out of the box” Blackbaud feature.

Major Donor

1. Cumulative lifetime giving total of gifts, planned gifts, pledges, and recognition credit for a constituent exceeds $25,000.
2. The **Major Donor** constituency is added and appears under C**onstituencies** as a link to the “Revenue” tab.

Matching Gift Organization Constituencies

This section details the process for documenting **Matching Gift Organization** constituencies.

Matching Gift Organization

1. The Matching gift condition type on the “Organization Info” tab is marked “Active” OR a relationship type of “Matching Gift Program” or “Matching Organization” is added to the constituent.
2. The **Matching Gift Organization** constituency is added and appears under **Constituencies**.
    a. Should the organization’s Matching gift condition become inactive, or the relationship of Matching Gift Program or Matching Organization is end dated, the **Matching Gift Organization constituency** is automatically removed.
3. This is a global change process and is scheduled to run nightly.

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Member Constituencies

This section details the processes for documenting **Member** constituencies. This process is immediate and is termed as a standard "out of the box" Blackbaud feature.

Member

1. A constituent is a member of an active membership program.
2. The **Member** constituency is automatically added and appears under **Constituencies** as a link to the "Memberships" tab.
    a. The **Member** constituency will remain on the constituency list if the constituent is an active member.

Non-Alumnus Constituency Type (Only applies to UI Reporting)

The **Non-Alumnus** constituency type applies only to constituents within a report when they do not have one of the following constituencies:

Graduate
Current Student
Attendee
Faculty/Staff
Uni Only
Donor Advised Fund
Matching Gift Organization
Corp / Business
Family Foundation
Foundation
Government Entity
Other Organization
Committee

*See **Constituency Hierarchy for UI Reporting**.

Opt Outs on Record Constituencies

The **Opt Outs on Record** constituencies are added by a global change process scheduled to run nightly.

Opt Outs on Record

1. A constituent record is updated with any active solicit code under the "Preferences" tab of the "Communication" tab.
2. The **Opt Outs on Record** constituency is automatically added and appears under **Constituencies.**

Other Organization Constituencies

This section details the processes for documenting **Other Organization** constituencies.

Other Organization

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1. New organizations are added that is not a company, foundation, or family foundation.
2. The **Other Organization** constituency is manually added by UIF Research and will appear under **Constituencies.**

Parent of Current Student Constituencies

The **Parent of Current Student** constituencies are added by a global change process. This process is scheduled to run nightly.

Parent of Current Student

1. Parent/child relationships are created for two individual constituents.
2. Child constituent status is "Currently Attending" one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign).
3. The **Parent of Current Student** constituency is added to the parent individual constituent and appears under **Constituencies**.

Parent of Former Student Constituencies

The **Parent of Former Student** constituencies are added by a global change process. This process is scheduled to run nightly.

Parent of Former Student

1. Parent/child relationship is created for two individual constituents.
2. Child constituent status is "Graduated," "Incomplete," or "Unknown" at one of our three affiliated educational institutions (Chicago, Springfield, or Urbana-Champaign).
3. The **Parent of Former Student** constituency is added to the parent individual constituent and appears under **Constituencies.**

Planned Gift Prospect Constituencies

The **Planned Gift Prospect** constituencies are added by global change processes, and this process is scheduled to run nightly.

Planned Gift Prospect

1. Household or Individual constituent has a GG+A Planned Giving Code of P (Primary), S (Secondary), or T (Tertiary).
2. The **Planned Gift Prospect** constituency is automatically added and appears under **Constituencies.**
    a. Should a constituent no longer meet the Planned Gift Prospect criteria, the **Planned Gift Prospect** constituency is automatically removed.

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Planned Giver Constituencies

This section details the process for documenting **Planned Giver** constituencies.

Planned Giver

1. A Planned Gift that has at least one designation and a status of “Accepted” or “Matured” is added to a constituent.
    a. Any other status removes the constituency.
2. The **Planned Giver** constituency is automatically added and appears under **Constituencies** as a link to the “Revenue” tab.
3. This process is immediate and is termed as a standard “out of the box” Blackbaud feature.

Principal Gift Prospect Constituencies

This section details the processes for documenting **Principal Gift Prospect** constituencies.

Principal Gift Prospect

1. Household or Individual constituent has a composite rating of $5MM+, prior revenue of $5MM+, is an active UIF Board member, or is an active Board of Trustees member.
2. The **Principal Gift Prospect** constituency is automatically added and appears under **Constituencies.**
    a. Should a constituent no longer meet the Principal Gift criteria, the **Principal Gift Prospect** constituency is automatically removed.
3. This is a global change process and is scheduled to run nightly.

Prospect Constituencies

The **Prospect** constituencies are added automatically as a constituent record is created. This process runs hourly.

Prospect

1. A constituent record is added.
2. The **Prospect** constituency is automatically added and appears under **Constituencies** as a link to the “Prospect” tab.
    a. Once a constituent has the **Prospect** constituency, a Prospect Plan can be created.

Relation Only Constituencies

This section details the processes for the **Relation Only** constituencies. This process is immediate and is termed as a standard “out of the box” Blackbaud feature.

Relation Only

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1. A constituent is added as a relationship of another constituent.
2. If the sole assigned constituency is **Prospect**, the **Relation Only** constituency is automatically added and appears under **Constituencies** as a link to the "Relationships" tab for the related constituent.
    a. If another constituency is added to the constituent, the **Relation Only** constituency is automatically removed. **

** Relation Only is removed from the constituencies listed in the upper portion of the constituent record only. It is **not** removed from the constituencies list on the Personal Info Tab.

Resident/Fellow/Intern Constituencies

The **Resident/Fellow/Intern** constituencies are added by global change process and is scheduled to run nightly.

Resident/Fellow/Intern

1. Active employee's Job Category code is "Fellow, Postdoctoral," "Fellow, Predoctoral," "Postdoctoral Intern," or "House Staff (Medical Residents and Interns)."
2. The **Resident/Fellow/Intern** constituency is automatically added and appears under **Constituencies**.

Student Faculty/Staff Constituencies

This section details the process for documenting **Student Faculty/Staff** constituencies. The following is a global change process is scheduled to run nightly.

Student Faculty/Staff

1. New student employee is added.
2. The **Student Faculty/Staff** constituency is automatically added and appears under **Constituencies.**

UI Involvement Constituencies

The **UI Involvement** constituencies are added by a global change process scheduled to run nightly.

UI Involvement

1. A constituent is added as an active member of a committee with a group type of "UI Involvement."
2. The **UI Involvement** constituency is automatically added and appears under **Constituencies.**

Uni Attendee Constituencies

The **Uni Attendee** constituencies are added by a global change process scheduled to run nightly.

Uni Attendee

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1. Status of "Incomplete" is selected under the **Education History** record of a constituent from Uni High.
2. The **Uni Attendee** constituency is added and will appear under **Constituencies.**

Uni Current Student Constituencies

The **Uni Current Student** constituencies are added by a global change process scheduled to run nightly.

Uni Current Student

1. Status of "Currently Attending" is selected under the **Education History** record of a constituent from Uni High.
2. The **Uni Current Student** constituency is added and will appear under **Constituencies.**

Uni Graduate Constituencies

The **Uni Graduate** constituencies are added by a global change process scheduled to run nightly.

Uni Graduate

1. Status of "Graduated" is selected under the **Education History** record of a constituent from Uni High.
2. The **Uni Graduate** constituency is added and will appear under **Constituencies.**

Volunteer Constituencies

The **Volunteer** constituencies are added immediately, and this is termed as a standard "out of the box" Blackbaud feature.

Volunteer

1. A constituent is manually added as a volunteer in "Volunteers."
2. The **Volunteer** constituency is automatically added and appears under **Constituencies** as a link to the "Volunteer" tab.

New Constituencies

The **New** Constituencies are updated programmatically each day.

New

1. The **New** Constituencies are located at the top of certain records in TED.
2. Recently created new constituency types for certain donors and volunteers that have institutional leadership volunteer roles or top donor relationships that warrant special handling.

- **PG Prospect Credit Relation** – assigned to organizations that have a credit relationship with an individual who has either $5M+ in household giving OR a prospect status rating of $5M+, or

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both (in other words, a credit relationship with an individual who has the constituency designation of Principal Gift Prospect).

- **Current U of I Trustee** – assigned to individuals who currently serve as members of the University of Illinois System Board of Trustees.
- **Former U of I Trustee** – assigned to individuals who previously served as members of the University of Illinois System Board of Trustees.
- **UIF Board Director** – assigned to individuals who currently serve on the UIF Board of Directors, either as a Director or a Life Director.

Note: Additionally, organizations with $5M+ in total giving are now assigned the Principal Gift Prospect constituency, previously assigned to individuals only.

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BIO FEEDBACK VERSUS DIRECT

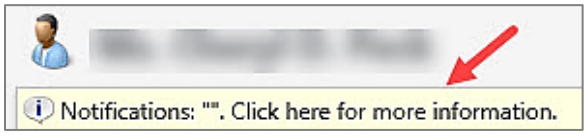
ADDING AND EDITING CONSTITUENT DATA

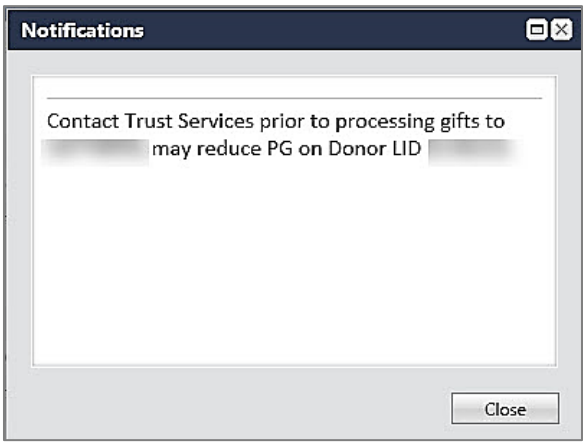
Most updates to constituent data in TED are done directly, which means the updates you've entered are visible on the constituent record immediately.

Some data in TED is updated using Bio Feedback options. Data updated using Bio Feedback Add/Edit is not visible on the constituent record until it has been processed by the UIF AIMS department. Allow up to 5 business days for this process. The AIMS department will contact you if they have questions about your submission.

Important Notifications

Some records have notifications attached that prohibit certain updates from being made. These important notifications should be reviewed before any changes are made to a constituent's record.





Information Source

Users should always choose an information source from the drop-down when adding or editing using direct or Bio Feedback options.



When editing, there may be an existing information source to replace (depending on the new source). Users should select the information source that applies to the current reason for editing the record. This will overwrite the previous information source. The history tab maintains the previous entry and source.

Direct Add or Edit

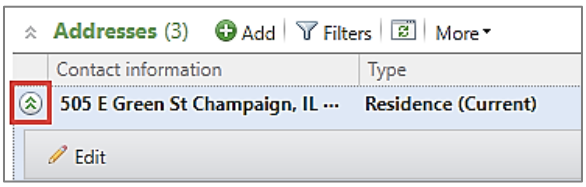
Constituent data submitted by users through direct Add or direct Edit in TED will display immediately on the record. There is no approval process for updates made using direct add/edit.



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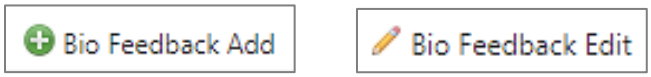
In some areas of TED, direct edits aren't visible until the chevron is opened, such as this one on the contact tab:

Various edits, adds, and deletes that have occurred on a constituent's record are tracked on the history tab. Data transactions (not financial transactions) displayed on the history tab are maintained automatically in TED and may not include all adds/edits.

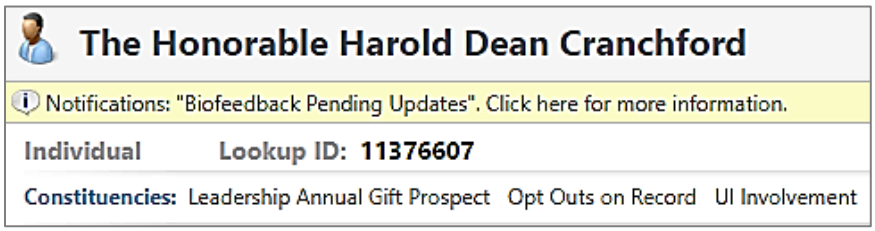


Bio Feedback Add or Edit

Constituent data submitted through Bio Feedback Add or Bio Feedback Edit in TED will be processed by the UIF AIMS department in batches.



Constituent records with updates submitted using Bio Feedback will display a notification:



After the data is processed by AIMS it will surface on the constituent's record and **users will receive an email when the update has been processed, usually within 5 business days.**

Various edits, adds, and deletes that have occurred on a constituent's record are tracked on the history tab. Data transactions displayed on the history tab are maintained automatically in TED and may not include all adds/edits.

Bio Feedback Comments

Use the Bio Feedback Add form in the Bio Feedback Comments section of the Comments tab to submit the following constituent information:

- When individual constituent records need to be merged (such as a duplicate record) – Submit from one of the duplicate individual records, and include both TED Lookup IDs.
- When household records need to be merged (such as marriage or a duplicate record) – Submit from one of the duplicate individual records. Be sure to include both TED Lookup IDs.
- When household records need to be dissolved (such as a divorce) – Submit from one of the individual records, and include both TED Lookup Ids. If there is a plan on the household, indicate with which constituent the plan will continue.

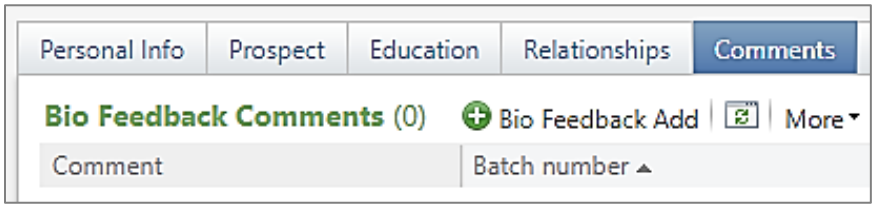
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- When you do not have access to update the information you need. *

*Very few TED users do not have access to update information. You will know if you don't have access if there is no add, edit, or Bio Feedback option for that specific information. If you are unsure about where to update information, please contact AIMS.

Users with base level access can submit all constituent updates using the Bio Feedback Add form in the Bio Feedback Comments section of the Comments tab.



IMPORTANT - Do not use the Bio Feedback Add button on the Comments Tab when you have access to update the information elsewhere – i.e. contact information, personal info, etc.
Requests to update information users have access to update will not be processed.

Other Do's and Don'ts when using the Comments Tab:

DO

- Use the Comments Tab only on the record that needs to be updated.
- Only include the information needed for the update.

DON'T

- Include the backstory, frustrations, and comments from the constituent. Please don't include a long text of information. Our Data Team receives hundreds of requests daily. Concise information will speed up the process.
- Use the Comments Tab to request more information about the constituent. This should instead be done via Research Request.

IMPORTANT – If your request cannot be processed for any reason, you will receive an email notification with additional details.

Direct or Bio Feedback Updates

Areas of TED updated by direct updates (add or edit) or Bio Feedback.

Tab	Field(s)	Direct	Bio Feedback
Comments	Bio Feedback Comments		X
Communications	General correspondence	X	
	Appeal mailing	X	
	Appeals	X	
Contact	Addresses	X	
	Phone numbers	X	

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	Email addresses	X	
	Social Media	X	
Education	Education		X
	Educational Involvement	X	
Personal	Mark deceased	X	
	Personal information		X
	Aliases	X	
	Demographics	X	
	Alternate lookup IDs		X
	Interests	X	
Prospect	Summary	X	
	Prospect team	X	
	Funding interests	X	
Relationships	Relationships	X	
	Employment history	X	
Volunteer	Volunteer types	X	
	General information	X	
	Traits	X	
	Availability	X	
	Locations	X	
	Additional information	X	
	Timesheets	X	

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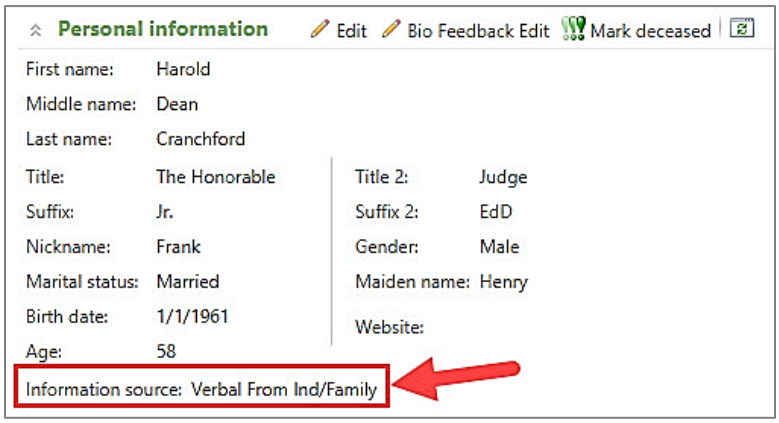
INFORMATION SOURCE

COMPLETE TABLE LIST AND DESCRIPTIONS

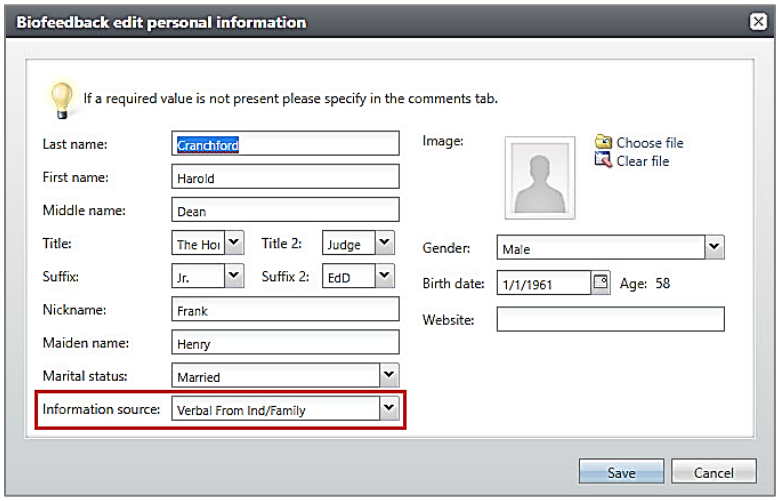
This important field is used for tracking the source of information in TED. This field is available in several areas of the system and should be used whenever information is updated. The drop down displays active information sources available for use.

When making an update to a constituent record, users should select an appropriate information source from the drop down. Some information sources surface on the record after the update is processed.

When editing, there may be an existing information source to replace (depending on the new source). Users should select the information source that applies to the current reason for editing the record and this will overwrite the previous information source. The history tab maintains the previous entry and source.



Users should always update the source when changing or adding to a record. If the source is not updated, AIMS will update the source with *Bio Feedback Forms*.



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Active Information Sources

Information Source	Active	Description
AA Illini Club Member	Yes	Information obtained through Alumni Association Alumni Club.
AA Membership Form	Yes	Information obtained from Alumni Association Membership Enrollment Form.
Address Finder	Yes	For more information contact AIMS@uif.uillinois.edu.
Admissions & Records	Yes	Information obtained from University of Illinois Admissions and Records Office (OAR).
Alumni Card	Yes	Information obtained from Alumni Biographical updates cards.
Alumni Directory	Yes	Information auto loaded or changed as a result from an Alumni Association (or college) directory. It may also be from census forms.
Alumni Magnet	Yes	Information obtained from UIAA Alumni Magnet.
Alumni Magnet Interface	Yes	For more information contact AIMS@uif.uillinois.edu.
Always Illinois	Yes	Information obtained from Always Illinois data.
Banner	Yes	Information obtained from University of Illinois Banner System.
Bio Feedback Forms	Yes	Information obtained from advancement user completing the TED biofeedback form.
Blackbaud Conversion	Yes	Information added from the AI Blackbaud Conversion Project 2015.
Blackbaud Email Service	Yes	To request additional information on where this information is pulled from contact Advancement Services.
Business Card	Yes	Information obtained from a business card.
Clipping--Newsp, Mag, Etc.	Yes	Information obtained from a news clipping (newspaper, magazine, etc.).
College Publications	Yes	Information obtained from University of Illinois Newsletters, Programs, Brochures, etc.
Committees Interface	Yes	For more information contact AIMS@uif.uillinois.edu.
Company Website	Yes	Information obtained from a company website.
Corporate Check	Yes	Information obtained from a corporate check.
Corporate Stationary	Yes	Information received on some form of printed corporate stationery.
Death Notice - Published	Yes	Notification of death has been received via a published source and the only information is the date of death. This should only be used when there is no official obituary available.
DIA Paciolan	Yes	Information obtained from Urbana Division of Intercollegiate Athletics (DIA) database.
Email Correspondence	Yes	Information received from the individual via email.
Email Third Party	Yes	Information received was an email to someone other than the data entry user.
Email Gift Proc/Imaging	Yes	Information received from UIF Gift Processing/Imaging.
Email +	Yes	Information obtained via WebTools email mass communications.
Information Source	**Active**	**Description**

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Faculty Interface	Yes	For more information contact AIMS@uif.uillinois.edu.
Faculty/Staff – Banner	Yes	Information obtained from Banner via the University Employment (faculty/staff) import process.
Forwarding Label/Post Ofc	Yes	Information obtained from a United States Postal Services (USPS) forwarding label/postal service.
Forwarding Third Party	Yes	Information received was forwarded to someone other than the data entry user.
Foundation Search	Yes	Information obtained from a foundation search.
Funeral Memoir	Yes	Information obtained from a funeral home memoir.
Gift Transmittal	Yes	Information obtained from the advancement department's gift transmittal form.
GM GRADUATE MEDICAL ED	Yes	Information obtained from University of Illinois at Chicago (UIC) Graduate Medical Education Office (GME).
Graduate - Banner	Yes	Information obtained from graduate import process from UI Banner System following end of Spring, Summer and Fall semesters.
Graduates Interface	Yes	Information obtained from University of Illinois Banner System following each semester final approval by each College Academic Affairs and forwarded to Registrars' Offices.
Hoovers	Yes	For more information contact AIMS@uif.uillinois.edu.
Individual Preference	Yes	Constituent provided information verbally or in writing of personal preference. Highest level source and information should not be changed unless supporting documentation is made available.
Instrumentl	Yes	Information obtained from instrumentl.
Internet Source	Yes	Information obtained from the Internet (excluding professionally published references on the web).
Krannert - Paciolan	Yes	Information obtained from University of Illinois Krannert Center for the Performing arts Paciolan database.
Letter-3rd Party Corrspd	Yes	Information obtained from a written notice from the individual or a member of the family to another individual.
Letter-Info from Ind./Fam	Yes	Information obtained from a written notice from the individual or a member of the family.
Lexis Nexis	Yes	For more information contact AIMS@uif.uillinois.edu.
LinkedIn	Yes	Information obtained from LinkedIn.
Manual Cleanup	Yes	Information was corrected for misspellings, formatting, etc.
Matching Gift Form	Yes	Information obtained from a matching gift form provided by and partially completed by the individual.

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Information Source	Active	Description
Obituary	Yes	Information obtained from an obituary. A link to the obituary may be added to database.
Online Directory (AA)	Yes	Information obtained from Alumni Association Online Directory.
Online Gift	Yes	Information provided by an individual when making an online gift.
Online Registration	Yes	Information entered by registrants when enrolling online for an event, function, meeting or conference.
Other Univ/Colleges	Yes	Information forwarded or obtained from other universities/colleges.
Payroll Deduction/EFT	Yes	Information obtained by UIF Gift Acknowledgment from the donor's payroll deduction or EFT authorization form.
Personal Check	Yes	Information obtained from a personal check obtained from the individual.
Phone Directory/Dir Asst	Yes	For more information contact AIMS@uif.uillinois.edu.
Pitchbook	Yes	Information obtained from pitchbook.
Press Release	Yes	Information obtained from a press release received from a company.
Questionnaire or Survey	Yes	Information obtained from a questionnaire or survey provided by the Individual/Family, not from census data.
Reference Material	Yes	Information obtained from a source of reference material (biographical sketches from Who's Who, CD Rom Products, other directories). Including professionally published references, both web and paper copies.
Resume	Yes	Information obtained from a personal resume.
SEC Document	Yes	Information obtained from Securities and Exchange Commission (SEC) documents.
Signed Change of Address	Yes	Information from a signed Change of Address Card.
Solicitation Card	Yes	Information obtained by UIF Gift Acknowledgement from the donor's written comments on a solicitation card (remit card, annual funds card).
SSDI - SS Death Index	Yes	Information obtained from the Social Security Death Index site.
Student - Banner	Yes	Information obtained from a source of student - banner (biographical sketches from Who's Who, CD Rom Products, other directories). Including professionally published students, both web and paper copies.

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Information Source	Active	Description
Telemarketing Call	Yes	Information obtained verbally by a student caller during a UIF Telemarketing phone solicitation.
Transcripts	Yes	Information provided by alumni when requesting transcripts from the Office of Admissions and Records (OAR).
University Gift Form	Yes	Information obtained by UIF Gift Acknowledgement from the University Gift Form.
Updated Manually	Yes	Information obtained from departmental databases and manually entered.
Uploaded Information	Yes	Information uploaded from a vendor or from another database system. 8/15/96
Uploaded Screening	Yes	Information received from a screening vendor. Data represents date information returned from vendor.
VanillaSoft	Yes	Information changed due to a contact result from VanillaSoft.
Verbal from Company	Yes	The individual's company provided this information verbally and/or information was obtained from a phone conversation with a representative of the individual's company.
Verbal From Ind/Family	Yes	Information provided by an individual or family member. Highest level source and data should not be updated without supporting documentation.
Verbal Third Party	Yes	Information is verbally given to someone other than the data entry user.
Vet Med Interface	Yes	Information obtained from n source of vet med interface (biographical sketches from Who's Who, CD Rom Products, other directories). Including professionally published vets, both web and paper copies.
Web Membership Form (AA)	Yes	Information obtained from source of web membership form (aa) (biographical sketches from Who's Who, CD Rom Products, other directories). Including professionally published webs, both web and paper copies.
Written Notice - Death	Yes	Information received in writing from family.
Xapien	Yes	Information obtained from xapien.

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As new sources are identified, new source codes are added to the drop-down values.

Inactive Information Sources

Information Source	Active	Description
AA Tracer Card	No	Information obtained from Alumni Association Tracer Card. A tracer Card is mailed to correct or acquire up-to-date information.
AA/TDT	No	For more information contact AIMS@uif.uillinois.edu.
Grad Transfer - Load	No	Information obtained from graduate transfer import process from UI Banner System following end of Spring, Summer and Fall semesters.
Grad Transfer - Manual	No	Information manually updated as a result of graduate transfer updated information.
OLLI Interface	No	For more information contact AIMS@uif.uillinois.edu.
Parents Interface	No	For more information contact AIMS@uif.uillinois.edu.
PerZip Update	No	For more information contact AIMS@uif.uillinois.edu.
Phone Address Update Only	No	For more information contact AIMS@uif.uillinois.edu.
Phone Detail Update Only	No	Phone information updated in legacy system.
QAS Address Cleanup	No	Information was obtained from vendor QAS.
QAS Email Append	No	Information appended as part of the QAS Email Append 10/2012.
Salutation Request	No	Information obtained from e source of salutation request (biographical sketches from Who's Who, CD Rom Products, other directories). Including professionally published salutations, both web and paper copies.
Student Load	No	Information imported from UI Banner Student system beginning of spring and fall semesters.
Students Interface	No	Information obtained from a source of students' interface (biographical sketch from Who's Who, CD Rom Products, other directories). Including professionally published students, both web and paper copies.
UIC Postcard: You Are UIC	No	Information received from a UIC Postcard Survey: You are UIC 11/2012.
Unit NCOA Load	No	National Change of Address information received by the units from the vendors processing mailings.
Updated Email - Auto	No	Information loaded or removed programmatically.
ZZ-INACTIVE A/FACTS Conv	No	Inactive Code - no longer in use.
ZZ-INACTIVE AA Const Grp	No	Inactive Code - no longer in use.

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ZZ-INACTIVE AA Oran/Addr	No	Inactive Code - no longer in use.
ZZ-INACTIVE AA Staff	No	Inactive Code- no longer in use.
Information Source	**Active**	**Description**
ZZ-INACTIVE College Dept	No	Inactive Code- no longer in use.
ZZ-INACTIVE College Membr	No	Inactive Code- no longer in use.
ZZ-INACTIVE Dept Info	No	Inactive Code- no longer in use.
ZZ-INACTIVE Dept Lists	No	Inactive Code- no longer in use.
ZZ-INACTIVE Faculty/Staff	No	Inactive Code- no longer in use.
ZZ-INACTIVE Gft Est Rec	No	Inactive Code - no longer in use.
ZZ-INACTIVE LIFETIME EMLS	No	Inactive Code- no longer in use.
ZZ-INACTIVE Marts/Lundy	No	Inactive Code- no longer in use.
ZZ-INACTIVE Mast Rec Con	No	Inactive Code - no longer in use.
ZZ-INACTIVE Parent	No	Inactive Code no longer in use.
ZZ-INACTIVE SS	No	Inactive Code no longer in use.
ZZ-INACTIVE UIF PC Memb	No	Inactive Code - no longer in use.
ZZ-INACTIVE UIF Staff	No	Inactive Code- no longer in use.
ZZ-INACTIVE Unit/Aff Uni	No	Inactive Code - no longer in use.
ZZ-INACTIVE White B/Rd	No	Inactive Code - no longer in use.
ZZ-INACTIVE Yellow B/Crd	No	Inactive Code - no longer in use.
ZZ-INACTIVE Zip+ 4 Pref	No	Inactive Code- no longer in use.

UPDATED 11/27/24

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UNDERSTANDING START AND END DATES

RETAINING HISTORICAL INFORMATION

Data with start and end date fields allow us to keep a historic record of previous data and when data is in effect. In areas in TED with start and end dates, existing data should not be edited but instead a new record should be added and the old record end dated.

Start and end dates fields are found throughout TED. Here a few examples of tabs that contain start and end date options:

- Attributes
- Communications
- Contact
- Education
- Events
- Relationships
- Volunteer

General Information

Records with end dates are considered “Former”, those with no end date are considered “Current”.

Filters, when available, allow you to toggle between viewing current data, or current **and** former data.

Choose the filter option in a section and check the box to Show former information or uncheck to hide former, then choose Apply. This filter setting will remain until you change it.

REVIEWED 7/31/24

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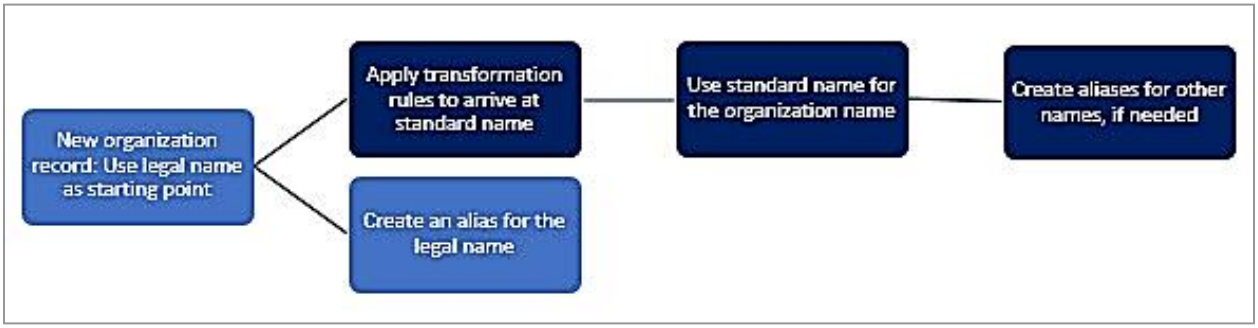
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ORGANIZATION NAMING STANDARDS

HIGH LEVEL OVERVIEW OF NAMING STANDARDS

An organization record has at least two forms of its name in TED. The organization's *legal* name, which is entered as an alias, and its *standard* name, displayed at the top of the organization's constituent record and in the search results window. When a new organization record is created, a series of rules is applied to transform the legal name into the standard name. This standardization process creates records that have a consistent appearance that helps minimize duplication, and ultimately makes it easier for you to find and work with the correct records.

Besides standard and legal names, organization records can have additional names in the form of aliases. These are helpful if an organization uses a different name or was referenced by one in the past (e.g., Apple Computer instead of Apple).



Transformation Rules

The table below illustrates a condensed and simplified list of rules to transform a Legal name into a Standard name:

Rule	Legal Name (before transformation)	Standard Name (after transformation)
Replace ampersands and plus signs with the word "and".	Dolce & Gabbana	Dolce and Gabanna
Remove hyphens and slashes; replace them with spaces if the symbols were between two letters.	Alcatel-Lucent	Alcatel Lucent
Remove the following stop words and their abbreviated forms:	Walgreens Boots Alliance Inc	Walgreen Boots Alliance

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Preserve the following domain names as part of the standard name: • .com, .org, .net, .ai, .io, .me	Amazon.com, Inc.	Amazon.com
Remove other punctuation not already discussed.	C^2 Consulting, Inc.	C2 Consulting
If removing punctuation creates a series of single letters separated by spaces, remove those separating spaces.	C. K. M. Multimedia	CKM Multimedia
Remove accent marks and other diacritical characters.	Estée Lauder	Estee Lauder
Spell out ordinal numbers.	5th Street Bank	Fifth Street Bank
For visual clarity, lowercase the following words: • and, at, for, of	Bernstein And Bank	Bernstein and Bank

Aliases

Aliases can be entered to provide users with alternative names for comparison when searching. **Each organization record should have a Legal Name alias to record the legitimate legal name.** Branding aliases can be entered to make it easier to locate the correct record when searching.

Standardized Form	Legal Name Alias	Branding Aliases
Apple	Apple Inc.	Apple Computer
Walgreens Boots Alliance	Walgreens Boots Alliance, Inc.	Walgreens Walgreen Company
3M	3M Company	Minnesota Mining and Manufacturing Company

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Matching Gift Organizations

Organization records solely used for matching-gift programs should continue to be created using the appropriate standard form and appending “Matching Gift Program” to the end. A Legal Name alias should also be entered.

Standardized Form	Matching Gift Record Name	Legal Name Alias for Matching Gift Record
Apple	Apple Matching Gift Program	Apple Inc.
3M	3M Matching Gift Program	3M Company

Searching for Organizations

Since these standards elude punctuation, you can use the TED wildcard character % any time you would have normally used a punctuation mark when typing a name. This is an easy-to-remember substitution that should help find the appropriate records when searching.

Looking for...	Use as search term	Results
H&R Block	H%R Block	H and R Block
C3.ai	C3%ai	C3ai
Avant! Marketing	Avant% Marketing	Avant Marketing

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SEARCHING FOR CONSTITUENT RECORDS

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CONSTITUENT SEARCH

LOCATING THE CORRECT RECORD IS KEY TO SUCCESS

Use the Constituent Search to locate and access constituent's records.

When searching for a constituent, you can make the search broad or specific, depending on the criteria you select. To get the best results, be selective in your search criteria and use as much information as you have available to narrow the search.

Following the steps outlined here will help you locate an Individual constituent record using a variety of options.

Additional Search Options

The Constituent Search allows you to search for 4 types of constituent records - individual, household, organization, and group/committee records.

For the best results, it is recommended that you use this search for individual or household records. For committee records please use the Committee Search and for organizations please use the Organization Search.

Quick Search Option

If you have the constituent lookup ID or full name, then the Quick Search Option at the top of the home page may be the fastest method for locating a record.



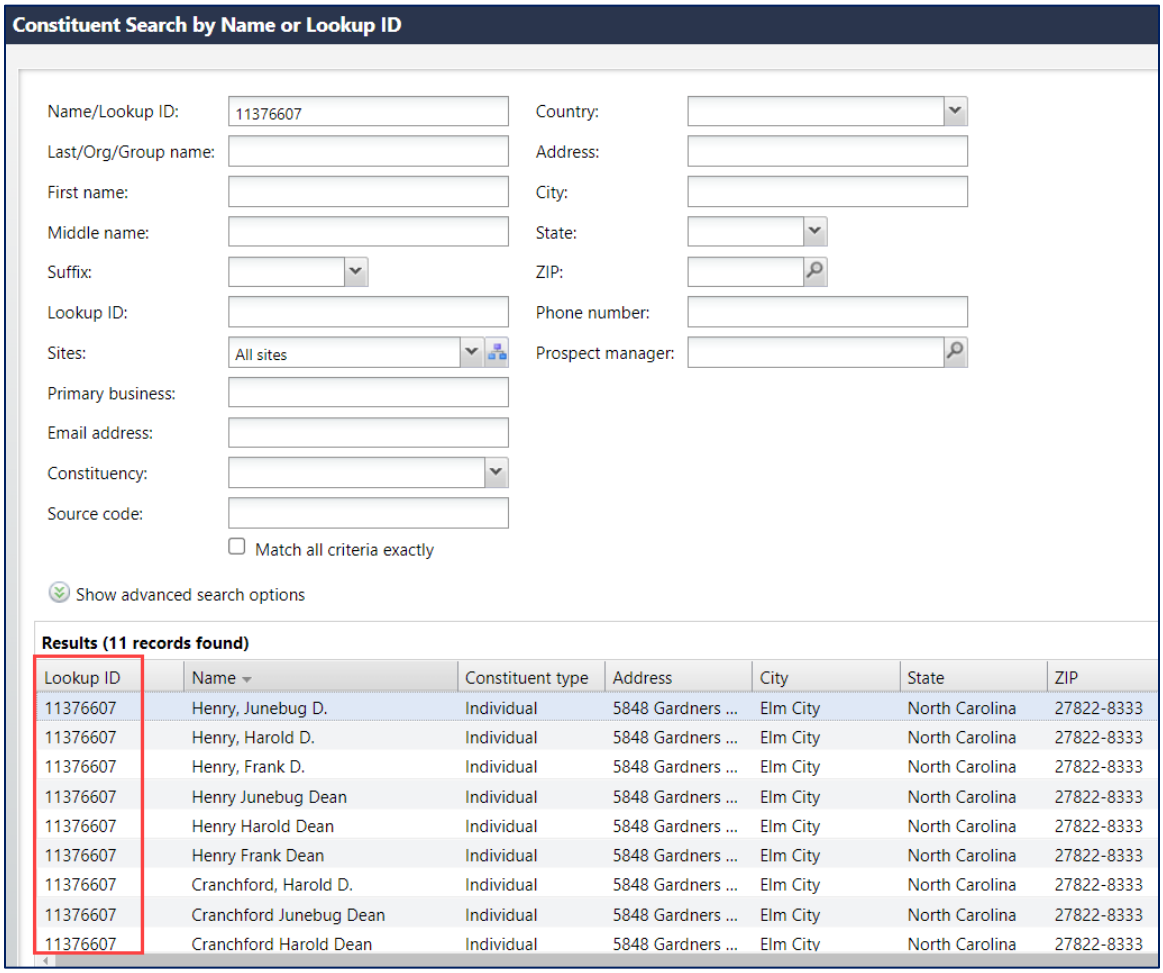
To search by lookup ID:

- Select Constituents in the drop down (after you've selected this drop down, TED retains it for future searches)
- Enter lookup ID in the field
- Press enter on your keyboard, or click the search icon.

Note that when you use the Quick Search option, it will not show up in the recent searches area on the left side of the screen.

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Depending on your advanced search options settings, your search may return multiple records as shown in this example. All 11 listed have the same Lookup ID and are the same record. Display of multiple records with the same Lookup ID is common and can be caused by nicknames and alias on a record if those options have been selected on your advanced search options. Clicking any of these will navigate you to the same record.



To search by name:

- Select Constituents in the drop down
- Enter the name using a format of
    - Last name, First name
    - First name Last name
    - You can also use wildcards (% or *)
- Press enter on your keyboard, or click the search icon.

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If only one record is found, you are taken directly to the constituent's record.

If there are multiple records with the same name then you will need to provide additional criteria or do further research to determine which is the correct record.

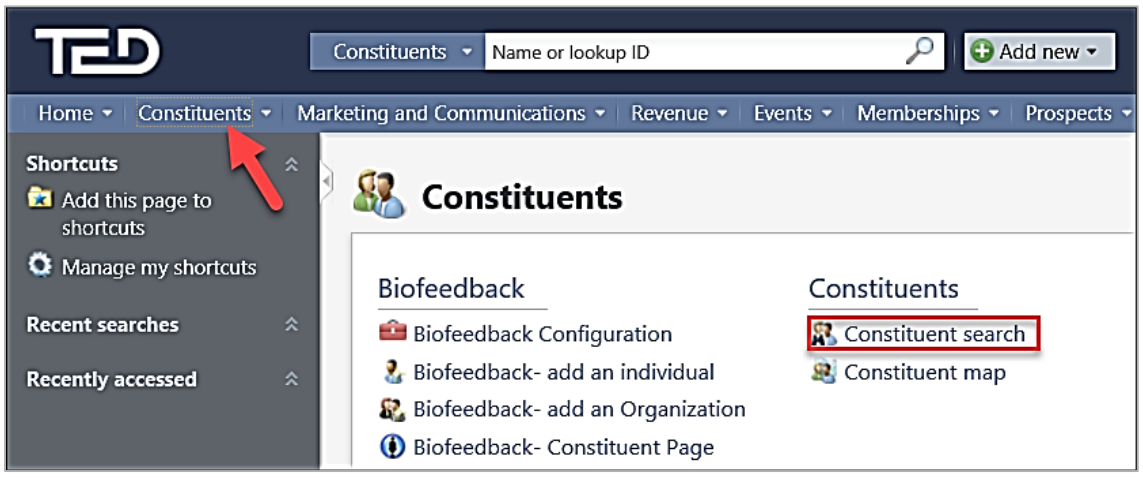
Constituent Search Window

The Constituent Search window offers additional options for locating the correct record. You can get to this window several different ways:

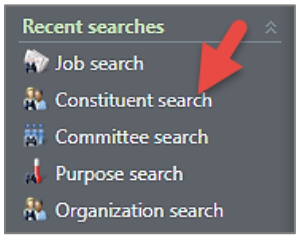


- Select Constituents in the drop down
- Leave the field empty
- Click the search icon

Another way to access the Constituent Search window is:



- Select Constituents in the blue navigation bar
- Choose the Constituent search option



You also may have the Constituent search in your Recent searches on the left if you have used the Constituent Search recently.

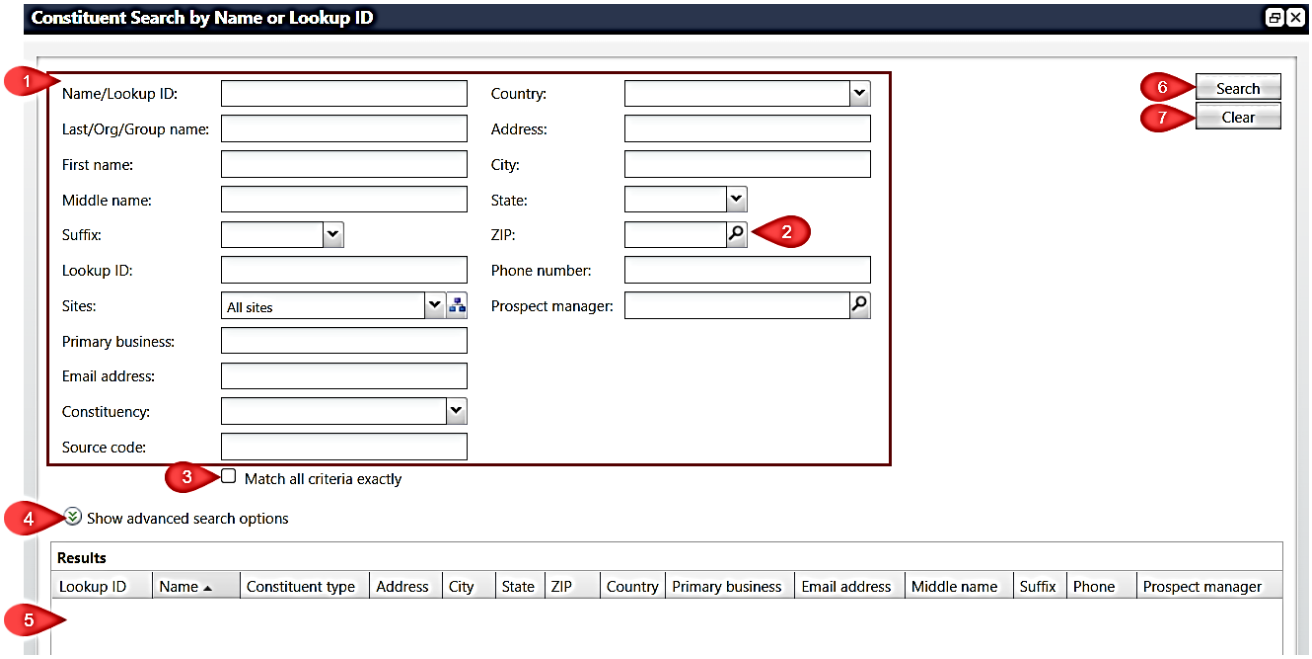
Any of these options will open the Constituent Search window and allow you to enter criteria that helps locate the record you need.

Note – Opening the constituent search from the constituents drop down, and opening the constituent search from the constituents main display area will open two different windows. Advanced search options you set in one, will not appear in the other.

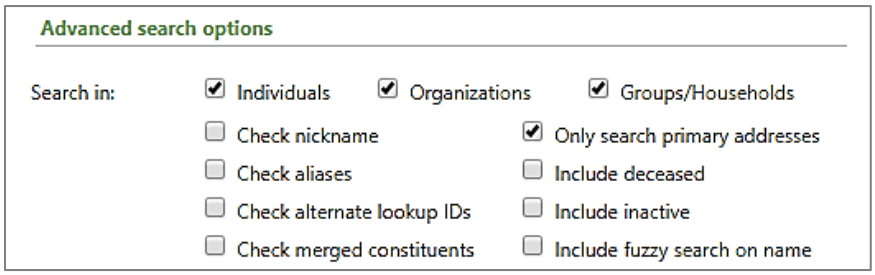
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Constituent Search Window

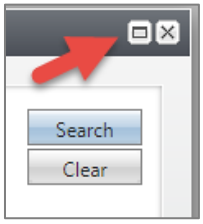


1. Criteria Fields can be combined to locate the record you need. The more fields you complete the narrower your results.
2. Clicking on the Zip/Postal Code Search button opens an additional search window where you can search by City, State, or Zip to find the correct corresponding info.
3. Match all criteria exactly will return only exact results that match your criteria. Wildcards should not be used when this option is selected.
4. Show advanced search options will display additional options to select from and will greatly affect your search results. Consider setting these options before entering your search criteria.
5. Results display at the bottom of the screen. Sort a column by clicking on a column heading. Hover over the edge of a column heading to expand the column. Click on the result to open that record.
6. Click on Search to search the database for constituents that match the search criteria entered.
7. Clear will remove any data entered in the criteria fields and sets the advanced search options back to the default settings shown below.



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Maximizing the window makes it easier to view the search result columns.

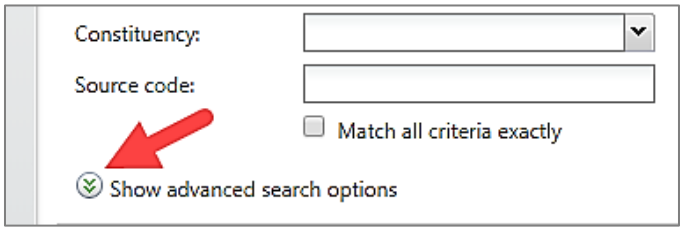


Close the search window with the X.

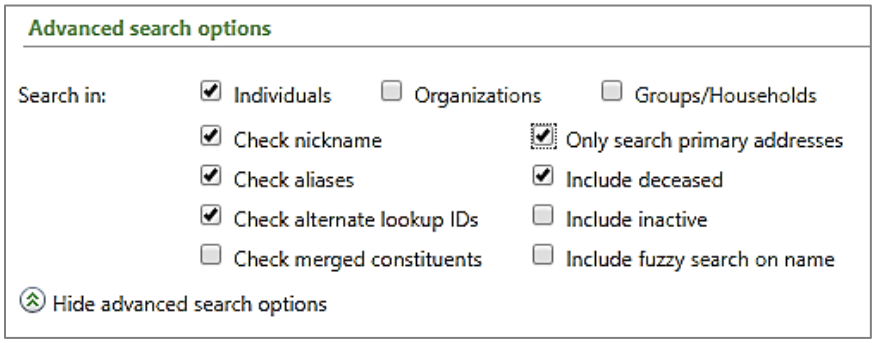
Advanced Search Options

Setting Advanced Search Options will help you locate the correct constituent records.

At the bottom of the search window, click Show advanced search options to display and set these options.



Below are recommended advanced search options to help you locate Individual records. TED will retain the selections you made for future searches.



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Each Advanced search option is described below.

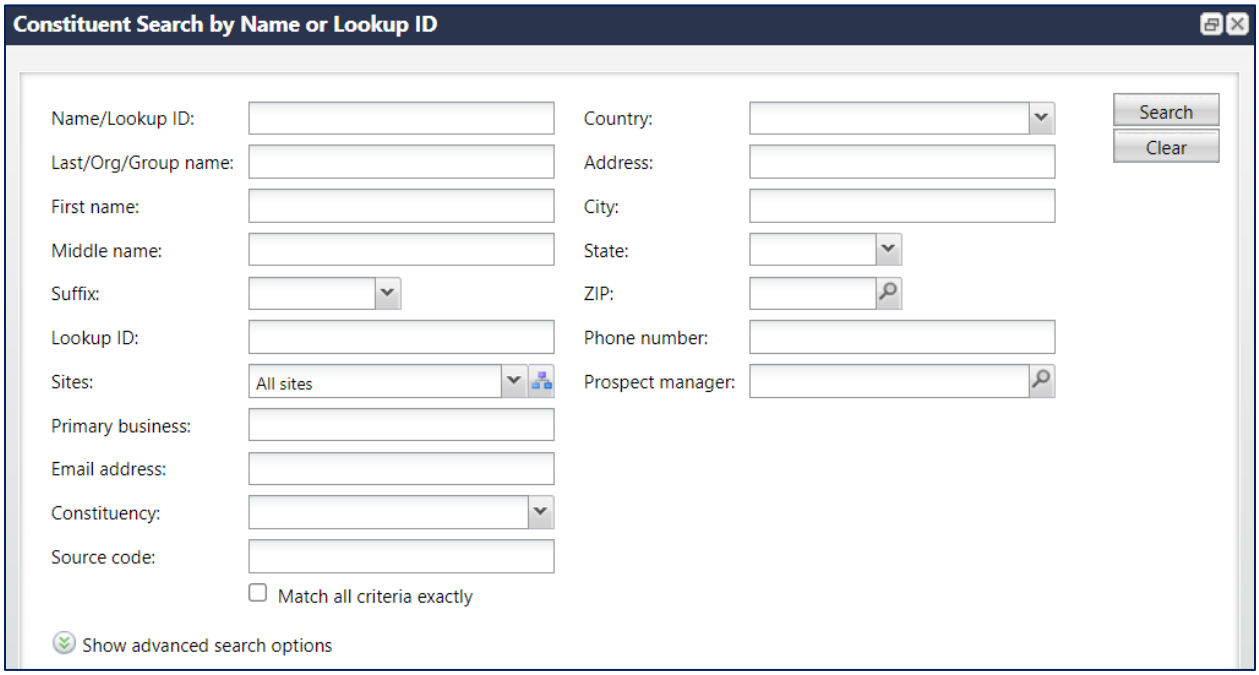
Screen Item	Description
Individual Organizations Group/Households	Returns only those records with the type or types you've selected.
Check nickname	To include nickname from the Personal tab, select this checkbox and enter the nickname in the First name field.
Check aliases	To include Aliases from the Personal tab, select this checkbox and enter the alias in the name field.
Check alternate lookup IDs	To include alternate lookup IDs located on a constituent's Personal tab, select this checkbox and enter the alternate lookup ID in the Lookup ID field. University Identification numbers (UINs) are an Alternate lookup ID and are a convenient way to locate them (if they are on the constituent's record).
Check merged constituents	Always leave this unchecked.
Only search primary addresses **	To include only the primary addresses from the Contact tab of the constituent records in your search, select this checkbox and enter the primary address information in the address fields. Checking this will help prevent records with multiple addresses from displaying.
Include Deceased	To include constituents marked as deceased in the search, select this checkbox.
Include inactive	Always leave this unchecked.
Include fuzzy search on name	It is recommended to leave this unchecked. If checked, this will return constituents with names that sound like the search criteria entered. For example, if you enter a last name of "Smith", constituents named "Smyth" will be included in the results.

**This option also affects email address search. If a constituent has more than one email and you are searching by email address, you will want to uncheck this box to search by all their email addresses.

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Search Criteria



These fields control your search results in combination with the Advanced Search Options you have set.

TED limits the results returned to a maximum of 100. Supplying information in several fields can narrow your results and help ensure that you locate the correct record. The more information you can provide to limit your results, the better it will be to locate the specific record you are looking for.

Wildcards (% or *) may be used in any of these fields except those with a dropdown (i.e. Entering the name Fran% in the first name field will yield Frank, Francis or Franz in the search results).

Screen Item	Description
Name/Lookup ID	This field accepts the name (formatted as shown below) or lookup ID. Formats for names include – Last name COMMA First name Last name SPACE First name First name SPACE Last name Lookup ID is the constituent's TED Lookup ID. This field will also use UIN or historical FACTS ID numbers if the Check alternate Lookup IDs option is select in the Advanced Search Options.
Last/Org/Group Name First Name Middle Name	Enter the name of the constituent to locate. You can enter an entire name or only the beginning letters. For example, if you enter "Sm", all names that begin with Sm appear, such as Smith and Smalls. Names are

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	not case-sensitive, so you can enter Smith, smith, or SMITH to return constituents named Smith.
Suffix	Select a suffix from the drop down. For example - when looking for a dentist select DDS from the list will return records that contain DDS in the suffix field.
Lookup ID	Lookup ID is the constituent's TED Lookup ID. This field will also use UIN or historical FACTS ID numbers if you have checked Check alternate lookup IDs box in the Advanced Search Options.
Sites	Searching by Site is not currently supported.
Primary Business	Entering the constituent's primary business name in this field returns all records that contain this business relationship marked as Primary on the constituent's record. This could be helpful for finding employees of a business if they've been indicated that way in the system.
Email Address	The constituent's email address.
Constituency	Select from the list of Constituencies in the drop down. Common constituencies include Current Student, Donor, Faculty/Staff or Graduate.
Source Code	This field pulls from the mass communication appeal's source code that appears on a constituent record under the Communication Tab > Appeals sub-tab. For example this could help track down a constituent that had been included in your recent Newsletter mailing.
Country	The country the constituent's address is located in.
Address	Enter the street address or post office box of the constituent to find, such as 7930 Baker Street. To search only by street name, use a wildcard character in place of the street number, such as "*Baker Street" or "%Baker Street".
City	Enter the city or town of the constituent to find. This field will turn into Province when a country is selected that is not United States.
State	Select the state of the constituent to find. This field will turn into Postcode when a country is selected that is not United States.
Zip	Enter the Zip code of the constituent to find. Clicking the zip search button will open an additional search window where you can search for a City, State, and/or zip code to find the correct corresponding information if you are unsure.
Phone Number	Enter the Phone number of the constituent to find (format with no spaces, parenthesis or hyphens).
Prospect Manager	Select the Prospect Manager from the drop down list.
Search button	Choose this button to execute the search.
Clear button	Choose this option to clear all fields and reset the Advanced Search Options to the default setting.

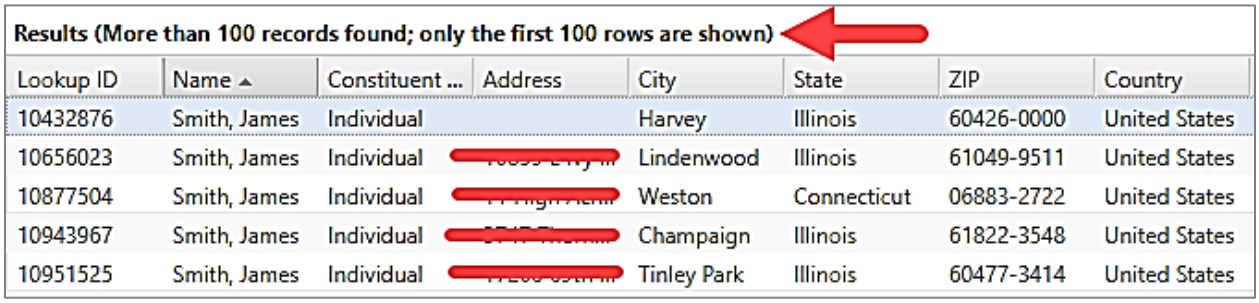
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Search Results

Search results are displayed in the lower portion of the search window.

When more than 100 records are found, only the first 100 rows are shown. Add additional search criteria to limit the results.



Results (More than 100 records found; only the first 100 rows are shown)

Lookup ID	Name	Constituent ...	Address	City	State	ZIP	Country
10432876	Smith, James	Individual		Harvey	Illinois	60426-0000	United States
10656023	Smith, James	Individual	[redacted]	Lindenwood	Illinois	61049-9511	United States
10877504	Smith, James	Individual	[redacted]	Weston	Connecticut	06883-2722	United States
10943967	Smith, James	Individual	[redacted]	Champaign	Illinois	61822-3548	United States
10951525	Smith, James	Individual	[redacted]	Tinley Park	Illinois	60477-3414	United States

Sort by a column by clicking on the header for that column.

Resize columns by hovering over the line between the column header; when the arrow appears you can drag the column to the right or left.

REVIEWED 7/26/24

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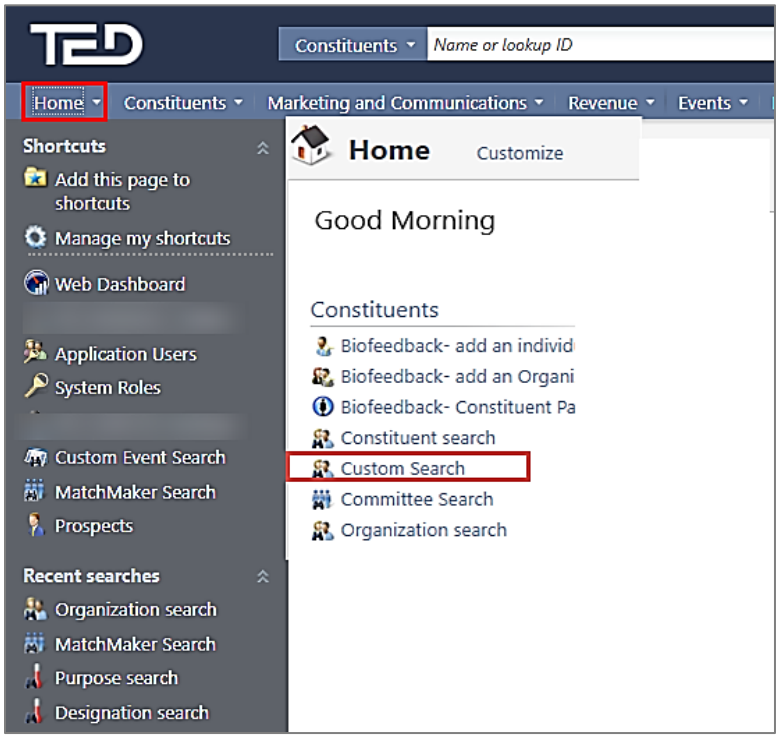
CUSTOM SEARCH

A POWERFUL WAY TO FIND CONSTITUENTS

Custom Search is a powerful way of finding constituents in TED. It is designed to allow users to find individual constituents using limited information, or to find groups of constituents using common data points like educational degree or ZIP code. This tool lets you search by education, revenue, employer, committees, ZIP code radius and more. Other demographic options are available, making it possible to locate constituents using partial or incomplete information.

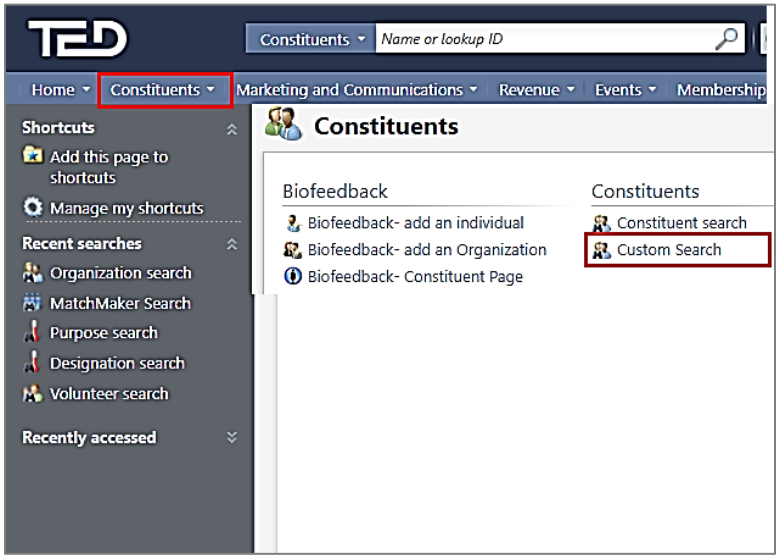
Locating Custom Search

Custom Search is found on either the Home or the Constituents Menu within the Constituent's area.

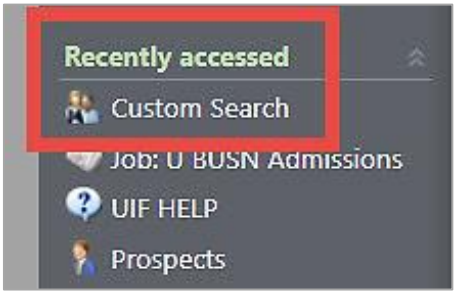


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If you have recently accessed the Custom Search, it will also appear in the **Recently accessed** area in the left sidebar.



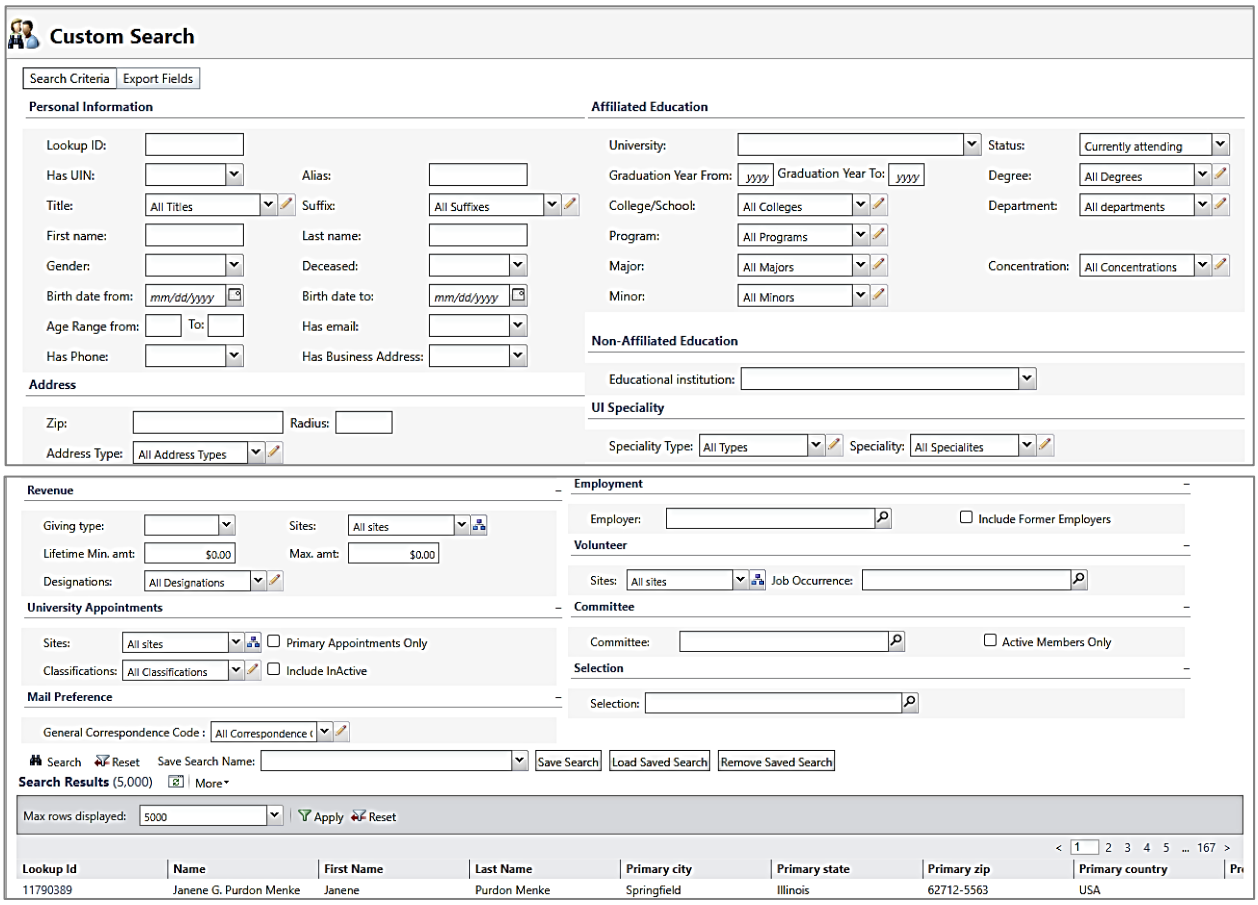
Using Custom Search

Custom Search is divided into two tabs: Search Criteria and Export Fields. The Search Criteria Tab has many criteria options to choose from in order to find a specific individual, or a group of them that have similar characteristics. The Export Fields tab allows you to pick which fields you want in your output.

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Search Criteria Tab



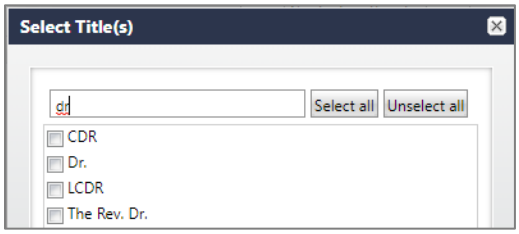
The Search Criteria Tab contains 12 sections: Personal Information, Address, Revenue, University Appointments, Mail Preference, Affiliated Education, Non-Affiliated Education, UI Specialty, Employment, Volunteer, Committee, and Selections. Each section has different types of available search options that can be minimized to display only the sections you wish to work with. Minimized sections will not remain minimized upon exiting Custom Search.

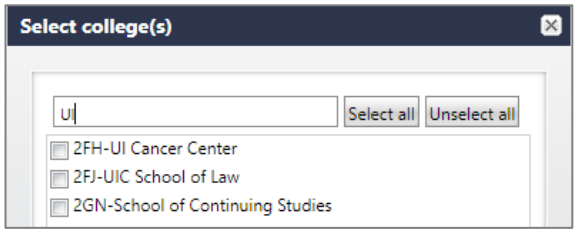
The available fields in Custom Search can be used exclusively or in conjunction with one another depending on your search needs. Some fields allow you to multi select. Those have a pencil or a hierarchy icon next to them. To multi select, click on the dropdown, and choose the selected option available which will open a new window, allowing you to make your choices. Once the options have been selected, you can edit the option by clicking on the pencil to the right of the field. To edit Site related options, click the hierarchy symbol to the right of the dropdown.

Tips:

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-A search box has been added to some of the multi-selectable fields that contain a long list of options to choose from. The list will begin to narrow after typing the second character in the search.

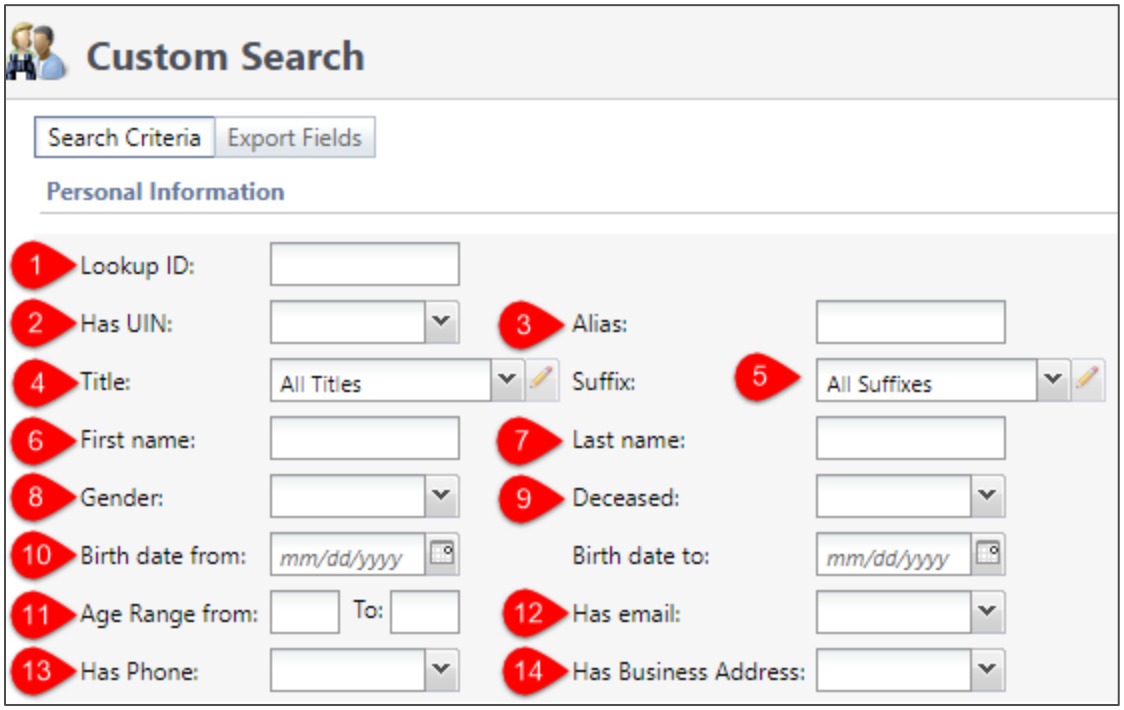




-Ctrl+f can be used as an additional way to search within fields that offer a drop-down selection. This shortcut will display a search box, allowing you to do a keyword search, and will highlight the results of your search in the list.

Personal Information

The Personal Information section contains the following options:



1. **Lookup ID** –The ID number assigned to each record in the TED system. Add a complete Lookup ID, or a partial lookup id using wildcards (%), to search for any constituent with an address on their record that matches that Lookup ID.
2. **Has UIN** – Select Yes or No to include or exclude those with a University Identification Number. When Yes is selected from the dropdown menu, the search will only include constituents assigned a UIN.

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3. **Alias** – A free form field that provides an additional option to search for a constituent. Example: a former name, alternate name, or a nickname. Add a complete alias, or a partial alias using wildcards (%), to search for any constituent with a matching alias on their record.
4. **Title**- The dropdown menu consists of two options:
    a. **All Titles**- This is the default option and will search for all titles.
    b. **Selected Titles** - When this is selected from the dropdown menu, a new window opens displaying the different titles available.
5. **Suffix** – The dropdown menu consists of two options:
    a. **All Suffixes** – This is the default option and will search for all suffixes.
    b. **Selected Suffixes** - When this is selected from the dropdown menu, a new window opens displaying the different suffixes available.
6. **First Name** – Searches the first name, nickname, and alias fields of a constituent's record. Add a complete first name, or a partial name using wildcards (%).
7. **Last Name** – Searches only the last name field of a constituent's record. Add a complete last name, or a partial name using wildcards (%).
8. **Gender** – Selecting a gender from the dropdown menu will limit the search results to only constituents with that designation. Available options are Unknown, Male, Female, and Other.
9. **Deceased** – Select Yes or No to include or exclude deceased individuals. When No is selected from the dropdown menu, the search will only include constituents who have not been designated as deceased in the TED database. If nothing is selected, both deceased and living individuals will appear in the results.
10. **Birth date** – The Birth Date Range From and To fields can be used in conjunction with one another or alone.
    a. From – Will return constituents with a known birth date after the date added to the field.
    b. To – Will return constituents with a known birth date before the date added to the field.

    Note: The Birth date From and Birth date to fields can be used in conjunction with one another or alone.
11. **Age Range -** The Age Range From and To fields can be used in conjunction with one another or alone.
    a. **From –** Will return constituents with a known age older than the age added to the field.
    b. **To** – Will return constituents with a known age younger than the age added to the field.
12. **Has email** – Select Yes or No to include or exclude individuals that have an active primary email address on their record.

    Note: Primary emails marked as Do Not Email are not considered active.
13. **Has Phone** – Select Yes or No to include or exclude individuals that have an active primary phone number on their record.

    Note: Primary phone numbers marked as Do Not Call are not considered active.
14. **Has Business Address** – Select Yes or No to include or exclude individuals that have an active primary business address on their record.

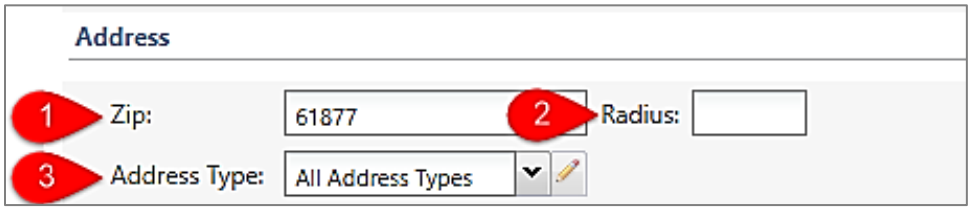
    Note: Primary Business addresses marked as Do Not Mail are not considered active.

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Address

The Address section contains the following options:



1. **Zip** – Add a 5-digit ZIP code (ex. 61820), or a partial code using wildcards (%), to search for any constituent with a primary address on their record within that ZIP code, regardless of geographic location.
   Note: A ZIP code +4 (ex. 61820-2558) can only be used if a radius is also chosen.
2. **Radius** – Is used in conjunction with the Zip field. This will expand the search to any constituent with a primary address that is within the mileage radius of the ZIP code parameter added.
   Note: Adding this parameter will limit the addresses searched to those within the United States.
3. **Address Type** – The Address Type area also works in conjunction with the ZIP and Radius fields, and contains two options in the dropdown menu:
   a. **All Address Types** – This is the default option. This will search for a constituent with a primary address, regardless of the address type, within the ZIP code or the mileage radius.
   b. **Selected Address Types** – This will search for a constituent with a primary address matching one of the selected address types within the ZIP code or the mileage radius.

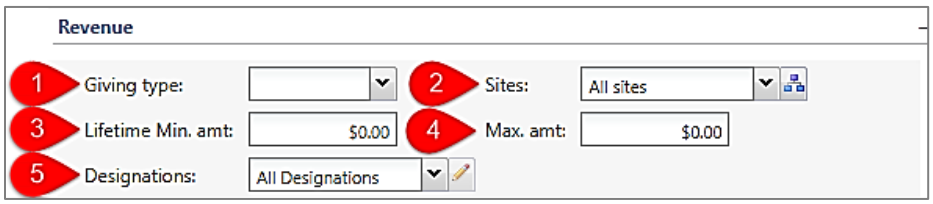
   Note: If Address Type is chosen without a ZIP code parameter, this will search for a constituent with a primary address matching one of the selected address types, regardless of geographic location.

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Revenue

The Revenue section contains the following options:



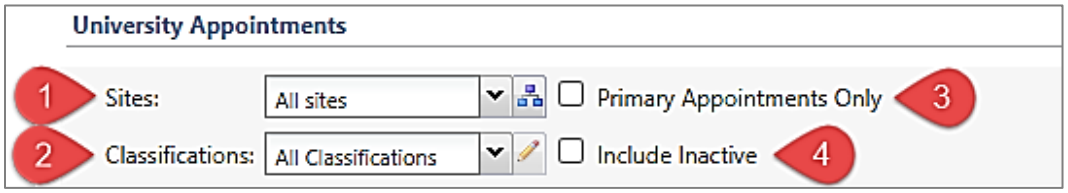
1. **Giving Type**- The Giving Type dropdown menu contains two options:
   a. **Individual (Self-Credit)**
   b. **Household (Self and Soft Credit, or Recognition Credit) – Both self-credit and soft credit types will be listed in the output. Household is the default if your search includes revenue and no giving type is selected.**

   Self-Credit: Credit automatically assigned to the individual responsible for making the gift.
   Soft Credit: Credit given to someone other than the individual responsible for making the gift happen.
   Recognition Credit: Another term given to anyone responsible for the gift (both self and soft credit).
2. **Sites** – The Sites dropdown menu contains two options:
   a. **All sites** – This is the default option and will search for all sites.
   b. **Selected sites** – Click the hierarchy button to open a new window and select a specific site(s) to narrow your results. Once selected, the Sites dropdown will change to Selected sites to show that sites are being selected.
3. **Lifetime Min. amt**- Enter the desired minimum amount of lifetime giving.
4. **Max amt** – Enter the desired maximum amount of lifetime giving.
5. **Designations** – The Designations dropdown menu has two options:
   a. **All Designations** - This is the default option and will search for all designations.
   b. **Selected Designations** - When this is selected from the dropdown menu, a new window opens displaying the different designations available.

Note:
Sites must be chosen before you can select designations.

University Appts.

The University Appointments section contains the following options:



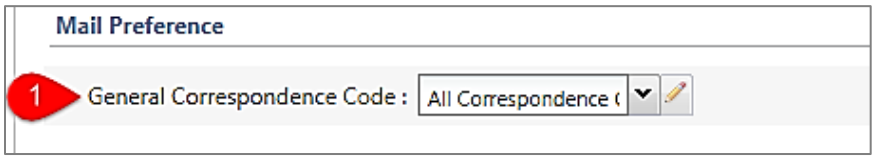
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1. **Sites**: The Sites dropdown menu contains two options:
   a. **All sites** – This is the default option and will search for all sites.
   b. **Selected Sites** – Click the hierarchy button to open a new window and select a specific site(s) to narrow your results. Once selected, the Sites dropdown will change to Selected sites to show that sites are being selected.

2. **Classifications**: The Classifications dropdown menu has two options:
   a. **All Classifications** – This is the default option and will search for all classifications.
   b. **Selected Classifications** - When this is selected from the dropdown menu, a new window opens displaying the different classifications available.
3. **Primary Appointments Only** - Checking this box will include individuals who have a primary University Appointment for the specified sites selected.
4. **Include Inactive** – Checking this box will include those who have an end dated university appointment.

Mail Preference

The Mail Preference section also known as an Opt-in-Code contains the following options:

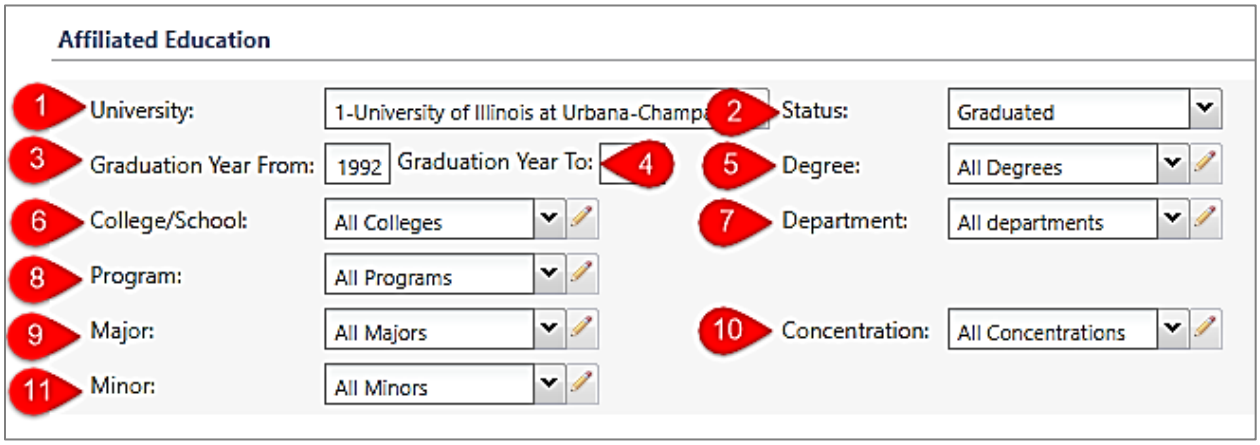


1. **General Correspondence Code**: The General Correspondence Code contains two options:
   a. **All Correspondence** – This is the default option and will search for all correspondence codes.
   b. **Selected Correspondence** - When this is selected from the dropdown menu, a new window opens displaying the different correspondence codes available.

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Affiliated Education

The Affiliated Education section contains the following options:



1. **University** – The dropdown menu allows you to select one of the three UI System universities.
2. **Status –** The dropdown menu contains four options**:**
    a. **Unknown** – If the constituent's status with a U of I institution is not certain.
    b. **Currently attending** – If the constituent is actively attending a U of I institution.
    c. **Incomplete** – If the constituent is not currently enrolled and did not complete graduation with a U of I institution.
    d. **Graduated** – If the constituent has graduated from any of the U of I institutions.
3. **Graduation Year From –** Will limit the search results to constituents who have graduated within or after that year.
4. **Graduation Year To –** Will limit the search results to constituents who have graduated within or before that year.
   Note: The From and To fields in the Education section refer to the class of field on the education record for a constituent.
5. **Degree** – The dropdown menu contains two options:
    a. **All Degrees** – This is the default option and will search all degrees.
    b. **Selected Degrees** – When this is selected from the dropdown menu, a new window opens displaying the different degrees available.
6. **College/School** – The dropdown menu contains two options:
    a. **All Colleges** – This is the default option and will search all colleges.
    b. **Selected Colleges** – When this is selected from the dropdown menu, a new window opens displaying the different colleges available.
7. **Department** – The dropdown menu contains two options:
    a. All departments – This is the default option and will search all departments.
    b. Selected departments – When this is selected from the dropdown menu, a new window opens displaying all departments available.
8. **Program –** The dropdown menu contains two options:
    a. **All Programs** - This is the default option and will search all programs.

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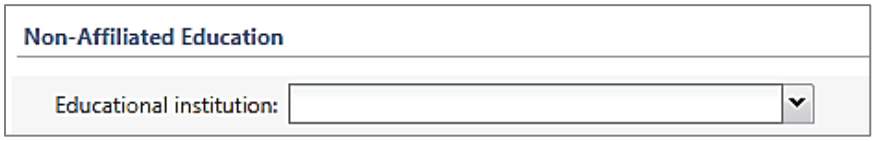
b. **Selected Programs** - When this is selected from the dropdown menu, a new window opens displaying the different programs available.

9. **Major** – The dropdown menu contains two options:
    a. **All Majors**- This is the default option and will search all majors.
    b. **Selected Majors** – When this is selected from the dropdown menu, a new window opens displaying the different majors available.
10. **Concentration** – The dropdown menu contains two options:
    a. **All Concentrations** – This is the default option and will search all concentrations.
    b. **Selected Concentrations** – When this is selected from the dropdown menu, a new window opens displaying the different concentrations available.
11. **Minor** – The dropdown menu contains two options:
    a. **All Minors –** This is the default option and will search all minors.
    b. **Selected Minors** – When this is selected from the dropdown menu, a new window opens displaying the different minors available.

Tip: To find Uni High Students, select HSG: High School Grad from the degree menu.

Non-Affiliated Education

The Non-Affiliated Education section contains a dropdown menu of educational institutions that allow you to search for individuals that attended institutions that are not affiliated with the University of Illinois.



UI Speciality

The UI Speciality section contains the following options:



1. **Speciality Type –** The Speciality Type dropdown menu contains two options:
    a. **All Types –** This is the default option and will search for all speciality types.
    b. **Selected Types –** When this is selected from the dropdown menu, a new window opens displaying the different speciality types available.
2. **Speciality** - The Speciality dropdown menu contains two options:
    a. **All Specialities**- This is the default option and will search for all specialities.
    b. **Selected Specialities** – When this is selected from the dropdown menu, a new window opens displaying the different specialties available.

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Employment

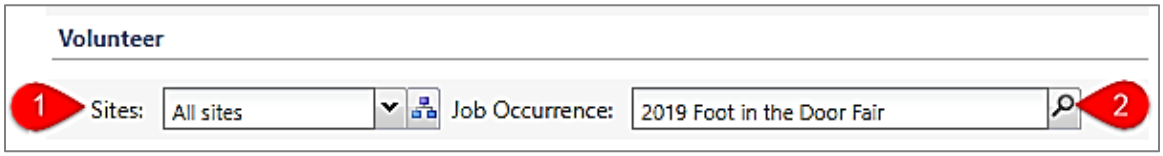
The Employment section contains the following options:



1. **Employer** – The Employer section allows you to search for any organization that has a record in TED by clicking the magnifying glass. The Employer field will only find constituents that have an active relationship with the organization.
2. **Include Former Employers** – Check the Include Former Employers box to view former employment.

Volunteer

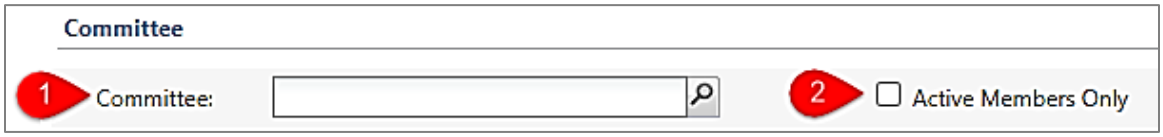
The Volunteer section contains the following options:



1. **Sites**: The Sites dropdown menu contains two options:
   a. **All sites** – This is the default option and will search for all sites.
   b. **Selected Sites** – Click the hierarchy button to open a new window and select a specific site(s) to narrow your results. Once selected, the Sites dropdown will change to Selected sites to show that sites are being selected.
2. **Job Occurrence** - This search allows you to find individuals who have been assigned to a specific Job Occurrence by clicking the magnifying glass.

Committee

The Committee section contains the following options:



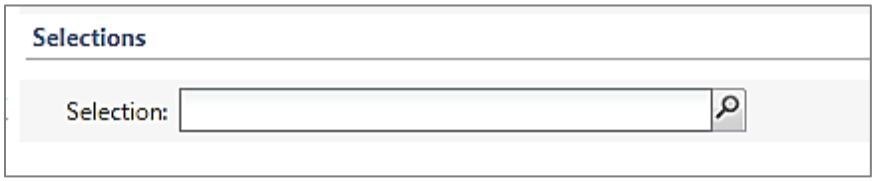
1. **Committee**- The Committee section allows you to search for all active and former members of a committee by clicking the magnifying glass.
2. **Active Members Only** – Check this box If you want to see only active members of a committee.

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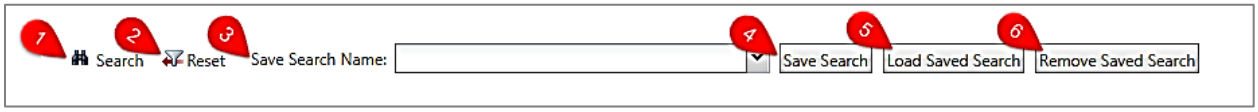
Selections

The Selections section allows you to pull in all information contained in a previously saved group of records from an ad-hoc list created in the Information Library. You can utilize the other areas within Custom Search to further filter the selection.



Note: Any data pulled in from the Selections section, is a day behind the data that is input into TED.

Search, Reset, and Save



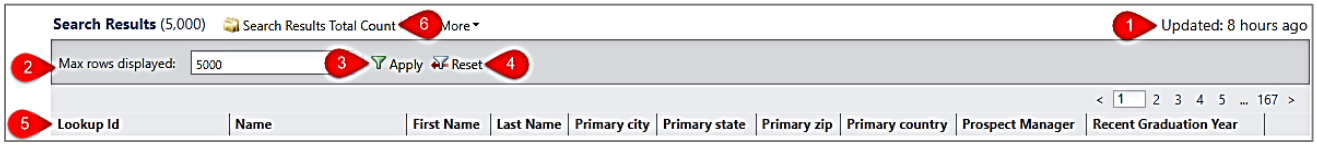
1. **Search** – Once all appropriate search criteria has been entered, click the Search button to run the search.
2. **Reset** –Custom Search keeps the last set of criteria you searched for. Click the Reset button to remove all criteria options in your search. This reset button will not reset your Search Results list.
3. **Save Search Name** – This field is used to name your search criteria or to select a previously saved search.
    a. Use this as a free form field to name your current group of search criteria. Then click Save Search.
    b. Use this field's dropdown option to choose one of your previously saved searches. Then click Load Saved Search.
4. **Save Search**- Click this button to save your search criteria. You will need to enter a name in the Save Search Name field in order to save it.
5. **Load Saved Search**- Click this button to load one of your saved searches. You will first need to select a previously saved search in the Save Search Name dropdown.
6. **Remove Saved Search**- Click this button to remove a saved search from the Save Search Name dropdown field. You will first need to select a previously saved search in the Save Search Name dropdown.

Search Results

The Search Results list displays the results of the criteria you chose in the sections above.

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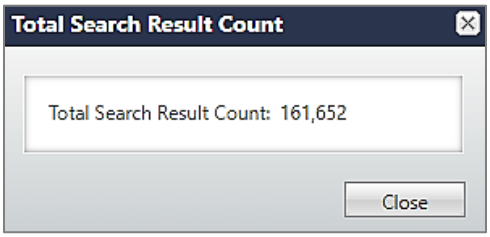


1. **Updated** – Indicates when the Data Warehouse was last refreshed. Custom Search pulls all information from the Data Warehouse. Therefore, if a constituent record was updated since the last time the warehouse was refreshed, those changes will not appear in your search until the next refresh (daily).
2. **Max rows displayed** – The list defaults to display 5000 rows of data. 100, 500, and 1000 rows can also be selected from the dropdown menu. Please note the Search Results are not returned in any particular order. Selecting to display fewer rows of data than the total result list can cause issues during export.
3. **Apply** – If you opt to change the max rows displayed, select **Apply** to update the results list.
4. **Reset** – Custom Search keeps the last set of criteria you searched for. Click this Reset button to clear your search results.
5. **Available Columns** – Display a specific set of information on the constituents that meet the search criteria. Columns cannot be reorganized, but clicking the heading will resort your list accordingly.
   a. **Lookup ID** – The constituent's individual TED record number.
   b. **Name:** The constituent's name as it appears on their individual record.
   c. **First Name** – The constituent's name as it appears in the first name field of their individual record.
   d. **Last Name** – The constituent's last name as it appears in the last name field of their individual record.
   e. **Primary city** – The city associated with the primary address on the constituent's individual record.
   f. **Primary state** – The state associated with the primary address on the constituent's individual record.
   g. **Primary zip** – The ZIP code associated with the primary address on the constituent's individual record.
   h. **Primary country** – The country associated with the primary address on the constituent's individual record.
   i. **Prospect Manager –** The name of the advancement staff responsible for the coordination of multiple active plans for the constituent.
   j. **Recent Graduation Year –** The year that the constituent graduated from the selected university or college. If the constituent has more than one, only the most recent will be displayed.

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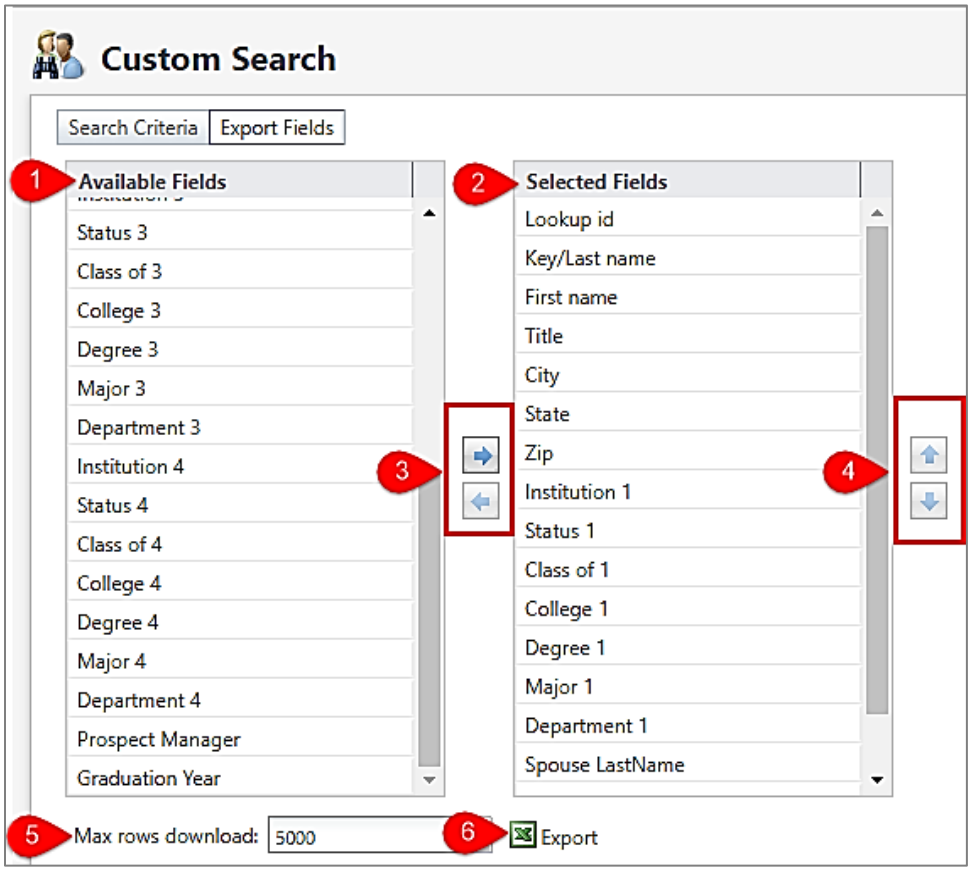
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6. **Search Results Total Count** – Clicking this displays a new window with a Total Search Result Count if yoursearch results in more than the maximum 5,000 records allowed.



Export Fields Tab

You may wish to export search results to Excel for more advanced filtering and manipulation. Use the Export Fields tab in the Custom Search to select the desired fields. Due to U of I policy, Custom Search is not used for mass communication lists.



1. **Available Fields** – Displays additional information, or data points, that can be displayed during the export process. This is not necessarily information that was part of the original search

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criteria or was originally searched for but can be used when assessing the exported list of results. By default, the following fields are in the Available Fields display:

a. **Name** – The constituent's full first and last name as it appears on their individual record.
b. **Middle name** – The constituent's middle name as it appears on their individual record.
c. **Nickname** – If the constituent has a nickname documented on their individual record.
d. **Age** – The constituent's age as it appears on their individual record, based on the birth dates added.
e. **Is deceased** – If the constituent has been marked deceased in the TED system.
f. **Institution 2** – If a constituent is associated with an additional educational institution.
g. **Status 2** – The educational status (graduated, unknown, etc.) that a constituent has with a secondary educational institution.
h. **Class of 2** – A constituent's graduation year with a secondary educational institution.
i. **College 2** – A constituent's associated college with a secondary educational institution.
j. **Degree 2** – A constituent's degree type with a secondary educational institution.
k. **Major 2** – A constituent's major with a secondary educational institution.
l. **Department 2** – A constituent's associated department with a secondary institution.
m. **Institution 3** – If a constituent is associated with a tertiary educational institution.
n. **Status 3** – The educational status (graduated, unknown, etc.) that a constituent has with a tertiary educational institution.
o. **Class of 3** – A constituent's graduation year with a tertiary educational institution.
p. **College 3** – A constituent's associated college with a tertiary educational institution.
q. **Degree 3** – A constituent's degree type with a tertiary educational institution.
r. **Major 3** – A constituent's major with a tertiary educational institution.
s. **Department 3** – A constituent's associated department with a tertiary educational institution.
t. **Institution 4** – If a constituent is associated with a quaternary educational institution.
u. **Status 4** – The educational status (graduated, unknown, etc.) that a constituent has with a quaternary educational institution.
v. **Class of 4** – A constituent's graduation year with a quaternary educational institution.
w. **College 4** – A constituent's associated college with a quaternary educational institution.
x. **Degree 4** – A constituent's degree type with a quaternary educational institution.
y. **Major 4** – A constituent's major with a quaternary educational institution.
z. **Department 4** – A constituent's associated department with a quaternary educational institution.
aa. **Prospect Manager** – A person who is part of the advancement staff that is assigned by the UIF Research and Portfolio Management (RPM) team.
bb. **Graduation Year** – The year that the constituent graduated from an educational institution. If the constituent has more than one grad year, the most recent one will populate in the output.

2. **Selected Fields** – The Selected Fields are the columns that will display once the search list has been exported. This is not necessarily information that was part of the original search criteria or

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was originally searched for but can be used when assessing the exported list of results. By default, the following fields are in the Selected Fields display:

a. **Lookup ID** – The constituent's individual TED record number.
b. **Key/Last name** – The constituent's last name as it appears in the last name field of his/her individual record.
c. **First name** – The constituent's name as it appears in the first name field of their individual record.
d. **Title** – The constituent's title, such as Mr. or Mrs., as it appears on their individual record.
e. **City** – The city associated with the primary address on the constituent's individual record.
f. **State** – The state associated with the primary address on the constituent's individual record.
g. **Zip** – The zip code associated with the primary address on the constituent's individual record.
h. **Institution 1** – The constituent's primary educational institutional record.
i. **Status 1** – The constituent's status (graduated, unknown, etc.) with their primary educational institution.
j. **Class of 1** – A constituent's expected graduation year with their primary educational institution.
k. **College 1** – A constituent's associated college with their primary educational institution.
l. **Degree 1** – A constituent's degree type with their primary educational institution.
m. **Major 1** – A constituent's major at their primary educational institution.
n. **Department 1** – A constituent's associated department with their primary educational institution.
o. **Spouse Last Name** – If a constituent has a spouse in the TED system, this will display the last name associated with the spousal constituent as it appears on their individual record.
p. **Spouse First Name** – If a constituent has a spouse in the TED system, this will display the first name associated with the spousal constituent as it appears on their individual record.
q. **Spouse Title** – If a constituent has a spouse in the TED system, this will display their title as it appears on the spousal constituent's individual record.

3. **Left/Right Arrows** – Columns can be moved from the Available Fields to the Selected Fields and vice versa by highlighting the column name and using the left and right arrows to move the field.
4. **Up/Down Arrows** – Columns can be reordered in the exported Excel file by highlighting the column name and using the up/down arrows to move the column name higher on the list or lower as needed.
5. **Max rows download** – The export process defaults to exporting 5000 rows of data. 100, 500, and 1000 can also be selected from the dropdown menu depending on need. Please note the

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Search Results are not returned in any particular order. Selecting to display fewer rows of data than the total result list can cause issues during export.

6. **Export** – Click the Export button to export the search results list with additional columns to an Excel spreadsheet.

REVIEWED 7/26/24

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HOUSEHOLD SEARCH

LOCATING THE CORRECT HOUSEHOLD RECORD

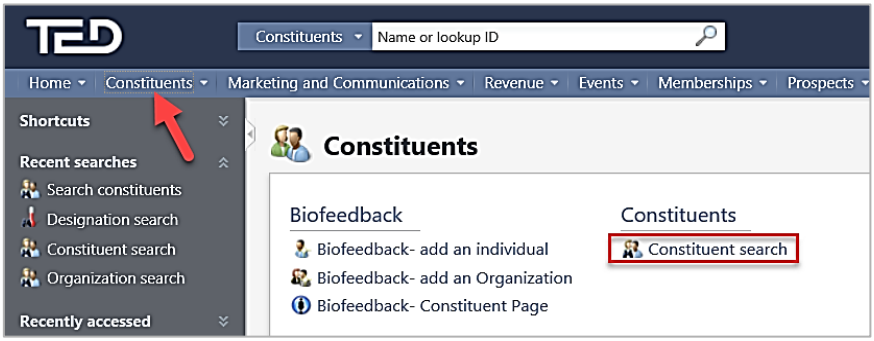
Every Individual record in TED is also attached to a Household record – even if there is only one person in their household, a household record was created. Special care should be given to ensure you are on the correct type of record before entering data.

Household records should only be used for entering:

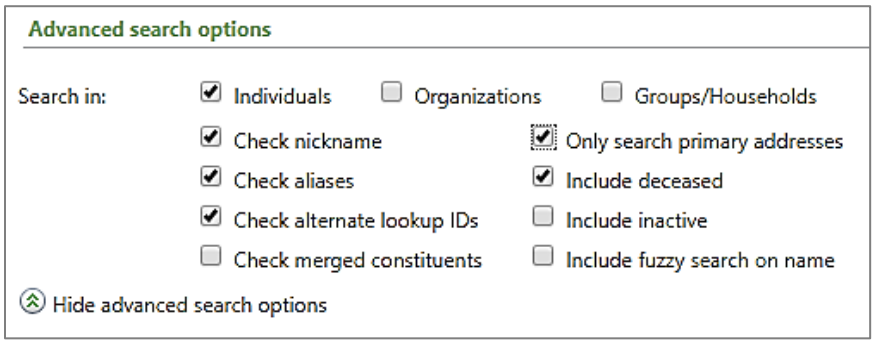
- Plans (Prospect tab)
- Interactions (Documentation and Interactions tab)

Locate a Household Record from an Individual Record

The preferred way to locate the correct household record is to first locate an individual constituent record using the Constituent search. See the Constituent Search documentation for complete instructions for locating constituent records.



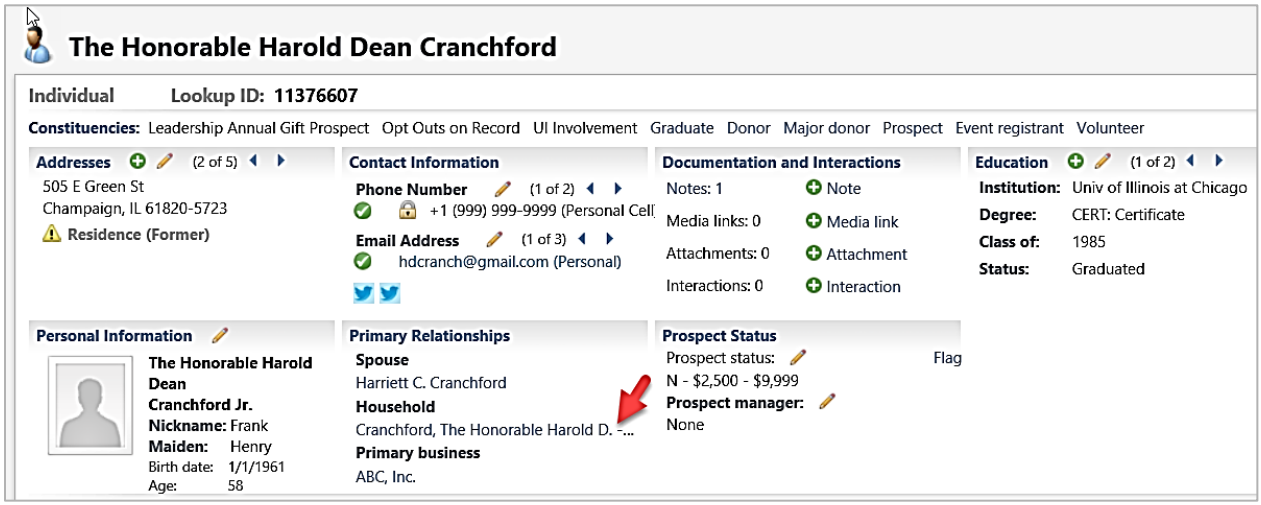
Below are recommended advanced search options to help you locate individual records. TED will retain the selections you make for future searches.



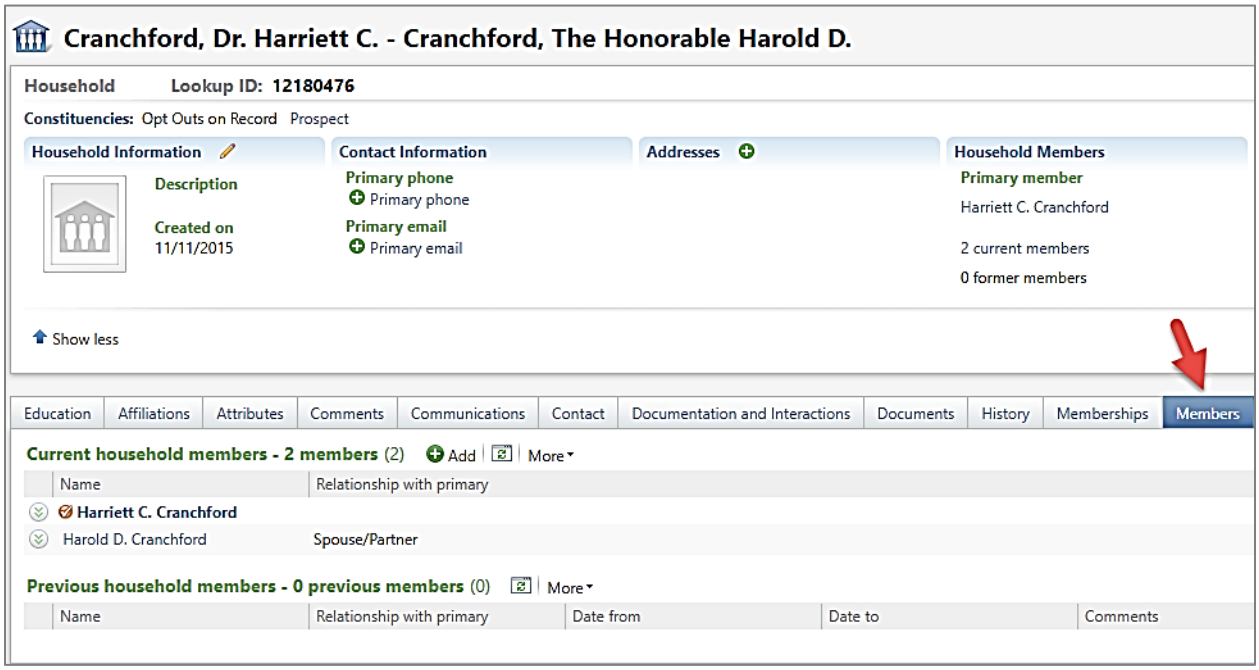
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From the individual constituent record, the Primary Relationships summary tile contains a direct link to the household record.



Current and previous household members are found on the Members tab of the Household record.



Note - The name on the household record begins with the constituent's last name, title and first name, with the primary member listed first.

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WHEN TO USE A HOUSEHOLD RECORD

AND WHEN NOT TO!

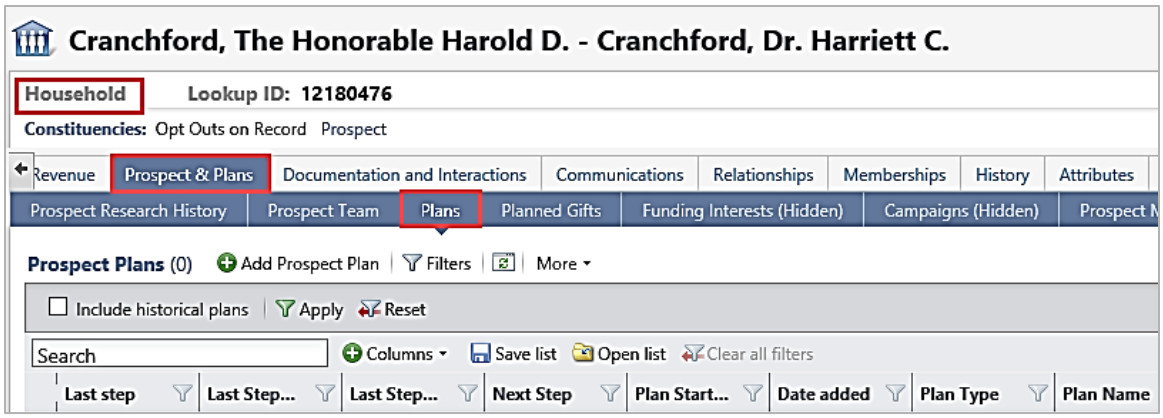
Every Individual record in TED is also attached to a Household record – even if there is only one person in the household, a household record is created. Special care should be given to ensure you are on the correct type of record before entering data.

Details below indicate when to use each type of record.

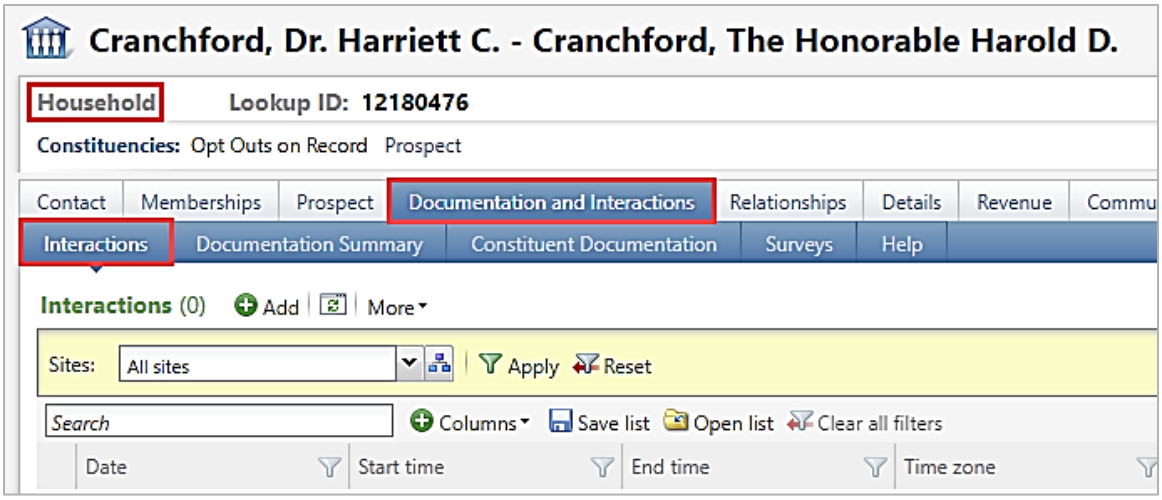
Household Records

Household records should be used for entering:

- Plans (Prospect & Plans tab)



- Interactions (Documentation and Interactions tab)

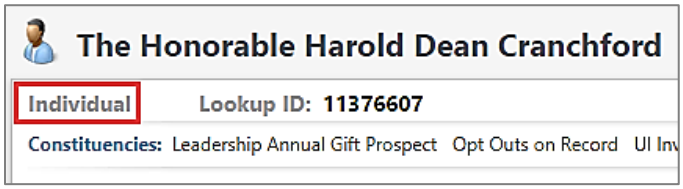


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Individual Records

Individual records should be used for everything else except the above.



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PRIMARY HOUSEHOLD MEMBER

EVERY RECORD HAS A HOUSEHOLD AND EVERY HOUSEHOLD HAS A PRIMARY MEMBER

Household records are designed to hold all **prospect plans** and constituent **Interactions**. Because of this, every record in TED is also a member of a household record.

A household record can contain two individual records (married or unmarried partners) or can contain a single (1) individual record. It is a requirement of the TED system that one member of the Household record must be labeled as Primary.

Viewing Households

You can navigate to a household record from the link on the Primary Relationships summary tile on a constituent record.



The members tab on the household record displays the constituent(s) that make up the household record, with the primary member indicated by a checkmark.



Primary Household Member

TED requires that one member of a Household record be labeled as the primary. The role of Primary Household Member is assigned to the member with the highest affiliation score.

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It is important to note that a primary household member is determined by affiliation points and that **does not** always indicate the following meanings:

- Doesn't always indicate a person is an alumnus (see the Education tab).
- Doesn't always indicate a person is a donor (see the Revenue tab).
- Doesn't always indicate a person is affiliated with an Advancement Unit (see the Affiliations tab).
- Is not assigned based on a gender or marital status (see the Personal Info tab).
- Is not always assigned based on any Relationships (see the Relationships tab).

Household Name Display Format

The general format for how the household name displays is as follows:

Household with 1 member	Name format
If constituent has title and middle name/middle initial	Smith, Mr. William H. Or Adams, Mrs. Margaret A.
If constituent has title and doesn't have middle name/middle initial	Smith, Mr. William Or Adams, Mrs. Margaret
If constituent doesn't have title and middle name/middle initial	Smith, William Or Adams, Margaret

Household with 2 members	Name format
If both constituents have title and middle name/middle initial	Smith, Mr. William H. - Adams, Mrs. Margaret A.
If primary constituents have title and middle name/middle initial and the other member has title, but no middle name/middle initial	Smith, Mr. William H. - Adams, Mrs. Margaret
If primary constituents have title and middle name/middle initial and the other member does not have title and middle name/middle initial	Smith, Mr. William H. - Adams, Margaret
If primary constituents do not have title and has middle name/middle initial and the other member does not have title and middle name/middle initial	Smith, William H. - Adams, Margaret
If both constituents do not have title, but do not have middle name/middle initial	Smith, William - Adams, Margaret
If both constituents have title, but do not have middle name/middle initial	Smith, Mr. William - Adams, Mrs. Margaret

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Changing a Primary Household Member

End users can request who is assigned as the Primary Household member. Ideally, this change should reflect the primary member of the household who has the highest affiliation score. This request can be made via the **Comments** tabs using the **Bio Feedback** Add button and will be updated per approval by the Offices of the Vice Chancellors for Advancement.

The primary member of a household must have an address on their record, or the address fields would be blank on communication lists or on reports such as the EGAD Download File. To avoid this, add the missing address on the primary household member's individual record from the second household member's individual record. UIF Annual Giving also checks for this when producing mass communication lists.

Individual Household Request Solicit Code

The NX-111 _UN ADMN Constituent Individual Household request opt out (Constituent Request) – 9-University of Illinois System signifies that these records are not receiving communications due to an "individual Household" request. This pulls the individual out of the solicitation list but not the household member that wants to receive communications.

Deceased Primary Household Member

There is an automatic process that will change the primary member if the current primary member is deceased, and the other member is still living.

REVIEWED 7/30/24

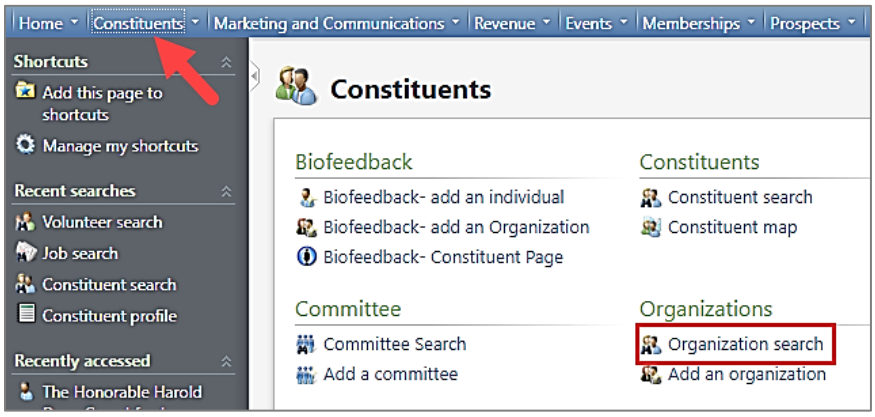
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ORGANIZATION SEARCH

LOCATING THE CORRECT ORGANIZATION RECORD

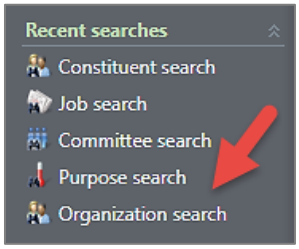
Organizations in TED may be a single record or a hierarchy of multiple records. When searching for organization records, especially within a corporate hierarchy, the best results are obtained by using the **Organization Search** to ensure you are accessing the correct organization record within the hierarchy.

To access the Organization Search window:



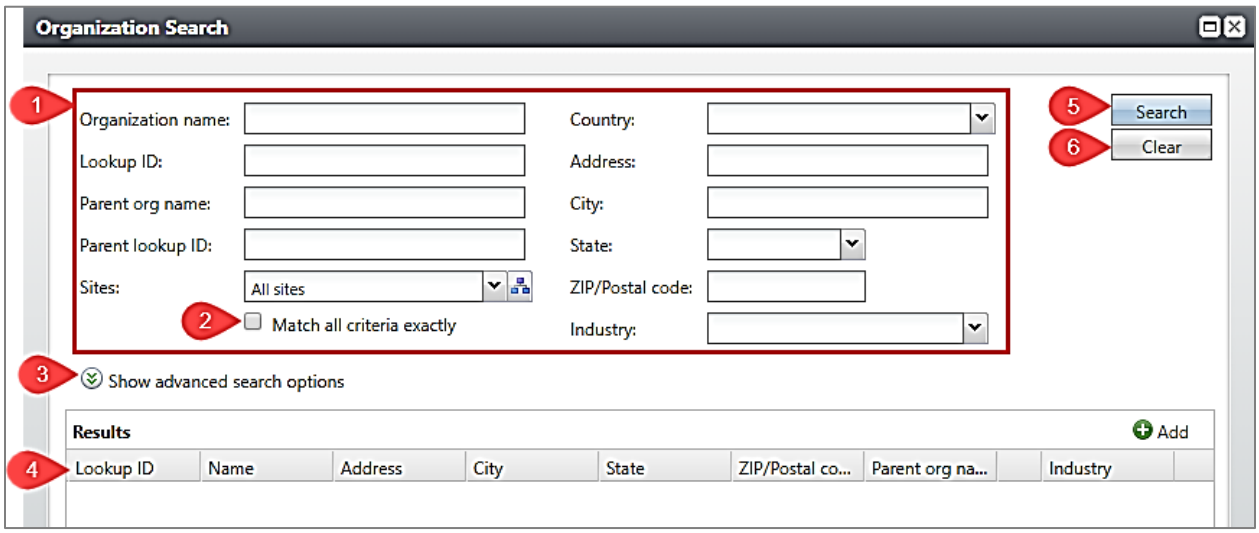
- Select Constituents in the blue navigation bar
- Choose the Organization search option

You also may have the Organization search in your recent searches on the left if you have used the Organization Search recently.

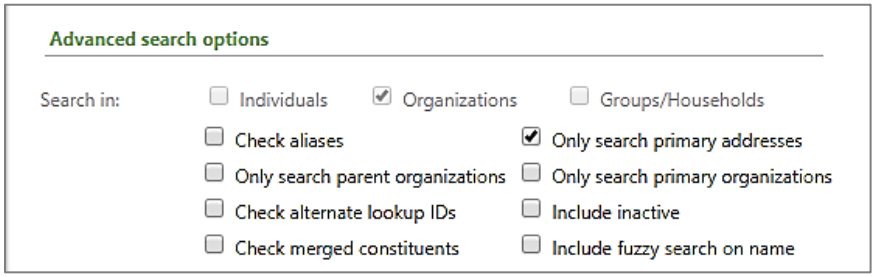


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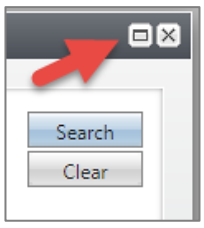
Organization Search Window



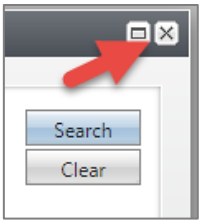
8. Criteria Fields can be combined to locate the record you need. The more fields you complete the narrower your results.
9. Match all criteria exactly will return only exact results that match your criteria. Wildcards should not be used when this option is selected.
10. Show advanced search options will display additional options to select from and will greatly affect your search results. Consider setting these options before entering your search criteria.
11. Results display at the bottom of the screen. Sort a column by clicking on a column heading. Hover over the edge of a column heading to expand the column.
12. Click on Search to search the database for organizations that match the search criteria entered.
13. Clear will remove any data entered in the criteria fields and sets the advanced search options back to the default settings shown below.



Maximizing the window makes it easier to view the search result columns.



Close the search window with the X.



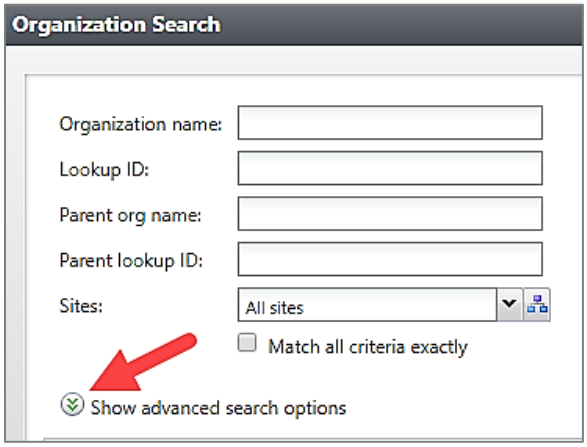
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Set Advanced Search Options

Setting Advanced Search Options will help you locate the correct organization record.

At the bottom of the search window, click Show advanced search options to display to set these options.

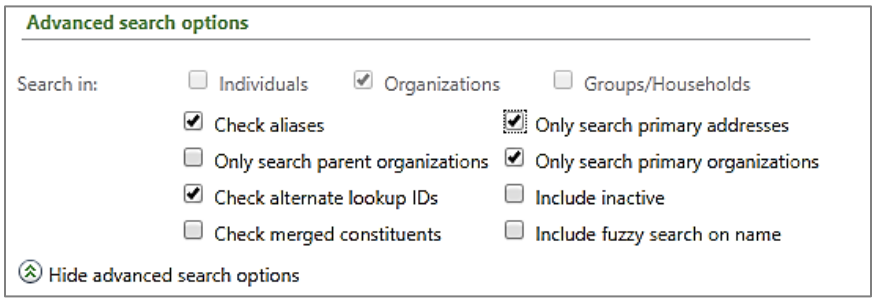


When you search for an organization determine if you should search for the primary organization or a parent organization. These options can be specified in your Advance Search Options.

A **primary organization** is the top of the corporate hierarchy, and it is the organization where all interactions and contact reports are stored by gift officers *(formerly this primary organization record was referred to as the TRK record)*.

Parent organizations are any branch of the corporate hierarchy that has a subsidiary organization.

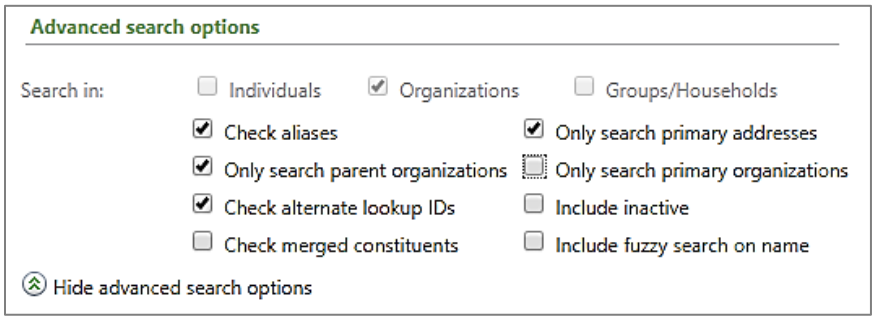
When you are searching for an organization record, for the purposes of adding or editing a plan, you will want to search only for **primary** organizations. All plans for Corporate & Foundation Relations prospects should be on the primary organization record.



If further searching is required for adding or editing non-CFR related data, such as employment and contact information, use the record for the organizational branch you want to change. In these cases,

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you may need to also search for **parent** organizations or non-primary and non-parent organizations.



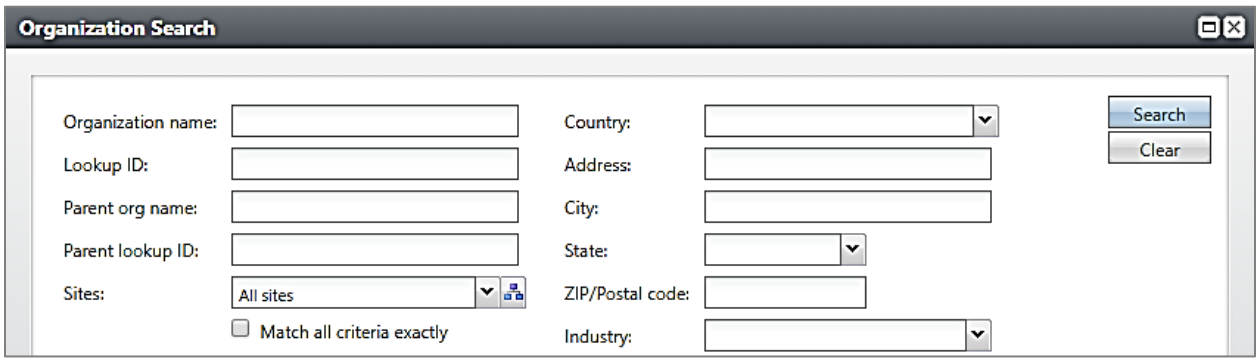
Additional Advanced Search Options

Screen Item	Description
Individual Organizations Group/Households	Returns only those records with the type or types you've selected.
Check aliases	To include Aliases from the Organization Info tab, select this checkbox and enter the alias in the name field. Some options are Doing Business As, Former Name, or Stock Ticker Symbol.
Check alternate lookup IDs	To include alternate lookup IDs located on an Organization Info tab, select this checkbox and enter the alternate lookup ID in the Lookup ID field.
Check merged constituents	Always leave this unchecked.
Only search primary addresses **	To include only the primary addresses from the Contact tab of the organization records in your search, select this checkbox and enter the primary address information in the address fields. Checking this will help prevent records with multiple addresses from displaying.
Only search primary organizations	To include only organizations that are marked as a primary organization.
Include inactive	Always leave this unchecked.
Include fuzzy search on name	It is recommended to leave this unchecked. If checked, this will return constituents with names that sound like the search criteria entered. For example, if you enter a last name of "Smith", constituents named "Smyth" will be included in the results.

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Search Criteria



These are the fields that control your search results in combination with the Advanced Search Options you have set.

TED limits the results returned to a maximum of 100. Supplying information in several fields can narrow your results and help ensure that you locate the correct record. The more information you can provide to limit your results, the better it will be to locate the specific record you are looking for.

Wildcards (% or *) may be used in any of these fields except those with a dropdown

Screen Item	Description
Organization Name	This field accepts the organization name. You may also use a wildcard of * or % in this field. For example, when searching for **PepsiCo Inc.** you may search using the search string **Pepsi*** to get PepsiCo Inc. to appear in the search results.
Lookup ID	Lookup ID is the organization's TED Lookup ID. This field will also look at Alternate Lookup ID if Advanced Search Options have a check in the Check alternate lookup IDs box.
Parent org name	Use this field when searching for an organization by its parent organization name. (You may also use a wildcard of * or % in this field.)
Parent lookup ID	Use this field when searching for subsidiary organization by the TED ID number of the parent organization.
Sites	Searching by Site is not currently supported.
Match All Criteria Exactly	Used to limit results to those that only match all the criteria.
Country	Use this field to search for an organization by country.
Address	Use this field to search for an organization by address. (You may also use a wildcard of * or % in this field.)
City	Enter the city or town of the organization to find.
State	Enter the State of the organization to find.
Zip/Postal code	Enter the Zip code of the organization to find.
Industry **	Use this field to search by North American Industry Classification System (NAICS) code.
Search button	Choose this button to execute the search.
Clear button	Choose this option to clear all fields and reset the Advanced Search Options to the default setting.

** Industry Codes –

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Industry codes in TED are based on the NAICS 2007 definitions. Research is referring to D&B Business Browser (formerly One Source) to obtain current codes (from 2012). NAICS made a recent update in 2017, so there may be differences in actual NAICS codes versus those on some TED records.

Questions regarding Industry codes on Organization records should be directed to the Research Department.

REVIEWED 7/30/24

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AFFILIATIONS TAB

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AFFILIATIONS

CONSTITUENT SCORES

Affiliations are calculated scores for individual, household, and organization records that aim to align a constituent's interests with the relevant unit(s) across the University of Illinois system. This scoring of constituent engagement incorporates a traditional model—awarding points for past behavior with and interest in UI—as well as awarding points for constituent interest and activity outside of the relationship with UI to match donor passions more accurately with the greatest opportunity for impact at the University. Constituents receive points for University of Illinois degrees, giving, volunteering, event attendance, employment, survey responses, opt-ins, parent interests, personal interests, and philanthropic giving to others.

Uses for Affiliation Scores

Affiliations can be used in a variety of ways:

Unit pool development: Even with as few as one point, affiliations can identify whether a constituent has an interest in a unit. Once included in that unit's "pool" of related constituents, the constituent can be included in marketing efforts, be eligible for portfolio management by advancement officers in that unit (if meeting and following all UI Advancement Policies and Procedures) or be included in unit counts/reports about affiliated prospects.

Quick snapshot of constituent engagement: The affiliations tab on a constituent's record provides a one-screen view of that constituent's affiliations with the university, rather than the user having to click to the revenue tab, relationships tab, events tab, volunteer tab, and others to get an overview of the constituent's relationship with the university.

Identification of appropriate unit(s) to manage prospects: As outlined in the Plan and Prospect Management Procedures, affiliation scores drive portfolio-management procedures, including which unit or regional advancement officers can manage which prospects and when, as well as what collaboration and communication is expected of advancement officers between affiliated units.

Pool/unit capacity assessments: Unit-affiliated constituents will appear in capacity assessments, analyses, and reports, including campaign pyramids and projection reports and unit demographic analyses. To limit the number of constituents included in these analyses for a unit, often a baseline affiliation threshold is used. For example, a minimum of 500 points may be used to mimic the level of a degree affiliation.

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Event invitations: While event invitation strategies often include total lifetime giving criteria, affiliation scores can be used to layer in an element of recency to the invitation criteria or to include highly engaged, lower-level donors, for example.

Marketing and annual giving segmentation and personalization: Affiliations can be used to split a marketing or annual giving audience into smaller sets of records—for example highly engaged vs. non-engaged constituents, faculty/staff, graduates, etc.—to better adjust messaging or designation options (funds available on a remit) to reflect that niche part of the audience.

Affiliations

Affiliations are heavily influenced by data that is representative of work across the advancement program. All areas within advancement play a key role in adding information to TED, which plays a part in increasing a constituent's affiliation for that unit.

The Affiliations tab is updated at 5 am every day to reflect additional data entered. Affiliations scores reset every Sunday to include deleted/removed data.

The Affiliations tab is viewable from both the individual constituent record and the constituent's household record.

Affiliations Sub-Tabs

The Affiliations tab is divided into four sub-tabs: **Individual**, **Household, Individual Detail, and Help**.



Individual Sub-Tab

The Individual sub-tab was designed to display the Affiliations for individual members of a household.

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When viewed from the individual record, the individual sub-tab will only display the individual constituent's affiliations.



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When viewed from the household record the individual sub-tab will display affiliations for each member of the household.



Constituent	University Code	University De...	Rank	Total Score	Percentage	Degree
Harold D. Cranchford						
Harold D. Cran...	U CAMP	University of Ill...	1	2,032	58.53%	0
Harold D. Cran...	C CAMP	University of Ill...	2	1,110	31.97%	1,000
Harold D. Cran...	UN CAMP	University of Ill...	3	330	9.50%	0
Harriett C. Cranchford						
Harriett C. Cran...	UN CAMP	University of Ill...	1	330	52.97%	0
Harriett C. Cran...	U CAMP	University of Ill...	2	284	45.59%	0
Harriett C. Cran...	S CAMP	University of Ill...	3	8	1.28%	0
Harriett C. Cran...	C CAMP	University of Ill...	4	1	0.16%	0

Household Sub-Tab

The Household sub-tab displays the total aggregated affiliation points for both members of the household. The information on the household sub-tab is the same on both the individual and the household record.



University Code	University Des...	Rank	Total Score	Percentage	Degree	Employment	Engagement
U CAMP	University of Illi...	1	2,317	61.52%	0	0	2,175
C CAMP	University of Illi...	2	1,111	29.50%	1,000	0	100
UN CAMP	University of Illi...	3	330	8.76%	0	0	0
S CAMP	University of Illi...	4	8	0.21%	0	0	0

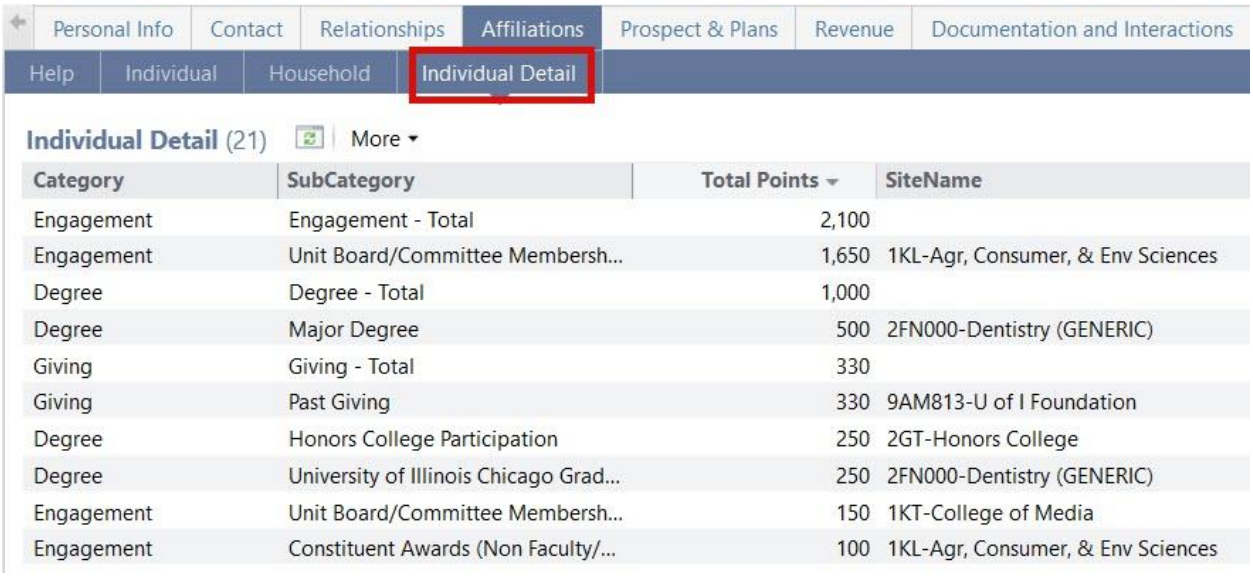
Affiliations By Advancement Unit (14) More

Advancement ...	Advancement ...	Rank	Total Score	Percentage	Degree	Employment	Engagement
U ACES	Agricultural, Co...	1	1,875	49.79%	0	0	1,825
C DENT	Dentistry	2	750	19.92%	750	0	0
F UIF	Foundation	3	330	8.76%	0	0	0
C HONRS	Honors College	4	250	6.64%	250	0	0
U CAMP	University of Illi...	5	210	5.58%	0	0	200
U MEDIA	Media	6	150	3.98%	0	0	150
C CAMP	University of Illi...	7	101	2.68%	0	0	100
U SAFFR	Student Affairs	8	50	1.33%	0	0	0
U UIAA	UI Alumni Asso...	9	19	0.50%	0	0	0

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Individual Detail Sub-Tab

On the individual record, the Individual Detail sub-tab lists the individual constituent's affiliation points by category, subcategory, total points and site name.



Category	SubCategory	Total Points	SiteName
Engagement	Engagement - Total	2,100	
Engagement	Unit Board/Committee Membersh...	1,650	1KL-Agr, Consumer, & Env Sciences
Degree	Degree - Total	1,000	
Degree	Major Degree	500	2FN000-Dentistry (GENERIC)
Giving	Giving - Total	330	
Giving	Past Giving	330	9AM813-U of I Foundation
Degree	Honors College Participation	250	2GT-Honors College
Degree	University of Illinois Chicago Grad...	250	2FN000-Dentistry (GENERIC)
Engagement	Unit Board/Committee Membersh...	150	1KT-College of Media
Engagement	Constituent Awards (Non Faculty/...	100	1KL-Agr, Consumer, & Env Sciences

Affiliations by University

Affiliations by University – Affiliations scores based on the university.

- **University Code:** University short code used in reporting
- **University Description:** Identifies the University by full name

Affiliations By University (4) More

University Code	University Description
U CAMP	University of Illinois at Urbana-Champaign
UN CAMP	University of Illinois System
C CAMP	University of Illinois at Chicago
S CAMP	University of Illinois Springfield

Affiliations by Advancement Unit

Affiliations by Advancement Unit – Affiliations scores based on campus, college, department, sub-department, or a grouping thereof.

- **Advancement Unit Code**: Advancement Unit abbreviation used in reporting.
- **Advancement Unit Description**: Identifies the Advancement Unit by full name.

Affiliations By Advancement Unit (12) More

Advancement Unit Code	Advancement Unit Description
A UIAA	Alumni Association
C AHS	Applied Health Sciences
F UIF	Foundation
S LAS	Liberal Arts and Sciences
U BUSN	Business
U CAMP	University of Illinois at Urbana-Champaign
U ENGR	Engineering
U LAS	Liberal Arts and Sciences
U LIBR	Library
U OTHR	Other Campus Units
U VCIA	Vice Chancellor for Institutional Advancement
UN ADMN	University Administration

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Affiliations by Site

Affiliations by Site – Affiliations scores based on **Sites** from each data set. Sites follow the Banner Systems hierarchy of campus (1 digit), college (3 digits) and department (6 digits).

- **Site ID**: Site identification number used in reporting.
- **Site Name**: Identifies the Site by full name.

Affiliations By Site (19) More

Site ID	Site Name
9AM813	9AM813-U of I Foundation
9AM637	9AM637-UI Alumni Association
9AM	9AM-UIF and Alumni Association
9AA615	9AA615-President's Office
4PH575	4PH575-Center for Lincoln Studies
2GF	2GF-Applied Health Sciences
1NS280	1NS280-Ofc VC Inst Advancement
1NA700	1NA700-Office of the Chancellor
1LR	1LR-University Library
1KV451	1KV451-History
1KV	1KV-Liberal Arts & Sciences

Affiliation Ranking

Rank

Determined by the total score column, ranks are displayed by University, Advancement Unit, and by Site. If more than one unit shares identical affiliations scores, then their ranks will be the same. Use the Household Affiliations to determine primary unit ranking.

Total Score

Total affiliations scores are calculated based on a combination of the following Affiliation categories: Degree, Employment, Engagement, Giving, Event Attendance, Student Involvement, and Interests.

Percentage

Displays the amount of affiliation to that university, unit, or site based on percentage totals.

In the example below, C DENT holds 49.41% of the constituent's total affiliation based on Advancement unit.

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Affiliations By University (3) More

University Code	University Description	Rank	Total Score	Percentage
C CAMP	University of Illinois at Chicago	1	850	55.99%
U CAMP	University of Illinois at Urbana-Champ...	2	337	22.20%
UN CAMP	University of Illinois System	3	331	21.81%

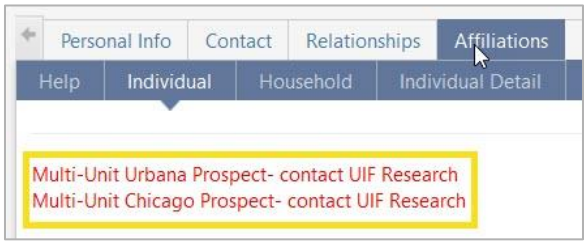
Affiliations By Advancement Unit (9) More

Advancement Unit C...	Advancement Unit Description	Rank	Total Score	Percentage
U OTHR	Other Campus Units	7	1	0.07%
U MEDIA	Media	6	75	4.94%
U CAMP	University of Illinois at Urbana-Cham...	4	110	7.25%
U BUSN	Business	7	1	0.07%
U ACES	Agricultural, Consumer, and Environ...	3	150	9.88%
F UIF	Foundation	2	330	21.74%
C DENT	Dentistry	1	750	49.41%
C CAMP	University of Illinois at Chicago	5	100	6.59%
A UIAA	Alumni Association	7	1	0.07%

Affiliations By Site (9) More

Site ID	Site Name	Rank	Total Score	Percentage
9AM813	9AM813-U of I Foundation	2	330	21.74%
9AM637	9AM637-UI Alumni Association	7	1	0.07%
2FN000	2FN000-Dentistry (GENERIC)	1	750	49.41%
2	2-University of Illinois at Chicago	5	100	6.59%
1NP392	1NP392-Beckman Institute	7	1	0.07%
1KT	1KT-College of Media	6	75	4.94%
1KM	1KM-Gies College of Business	7	1	0.07%
1KL	1KL-Agr, Consumer, & Env Sciences	3	150	9.88%
1	1-University of Illinois at Urbana-Cham...	4	110	7.25%

Multi-Unit Prospect Flags



The Multi-Unit Prospect flag is calculated by University and labeled as Multi-Unit Chicago, Multi-Unit Springfield or Multi-Unit Urbana. When a constituent's top advancement unit affiliation per university is less than 65% of the total points to that University, the constituent will have a multi-Unit flag for that University. A constituent has the potential to have more than one Multi-Unit Prospect flag. This is an indicator of whether a prospect should be managed by a University's Central Major Gift Team. The Multi-Unit Prospect flag no longer needs to be coupled with the primary affiliated Advancement Unit.

Multi-Unit Prospect flags are calculated both on the individual and household level. Since the UI development program focuses on managing households and not individuals, prospect management decisions regarding Multi-Unit Prospects are based on the household. Multi-Unit prospects may be allocated to regional or central fundraising staff as determined by the Vice Chancellors for Advancement for each university. Questions can be directed to the UIF Research and Portfolio Management team regarding prospect management best practices for these constituents.

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Multi-University Prospect Flag

When a constituent's top University affiliation is less than 65% of total affiliation points, the constituent will have a Multi-University Prospect Flag. The Multi-University Prospect flag is calculated both on the individual and household level. Since the UI development program focuses on managing households and not individuals, prospect management decisions regarding Multi-University Prospects should be based on the household. Multi-University prospects may be allocated to the Foundation's Multi-University team. Multi-University prospects, where actively managed toward a major gift by more than one university, are assigned a prospect manager at the discretion of the UIF President, in consultation with the Executive Operations Team. Questions can be directed to the UIF Research and Portfolio Management team regarding prospect management best practices for these constituents.



Affiliation Points by Column

Affiliations scores are determined using the following University of Illinois involvement categories: Degree, Employment, Engagement, Giving, Event Attendance, Student Involvement, and Interests. Each numbered column is defined in the following sections of this document.

Affiliations By University (4) More

University Code	University Description	Rank	Total Score	Percentage	1 Degree	2 Employment	3 Engagement	4 Giving	5 Event Attendee	6 Student Involvement	7 Interests
C CAMP	University of Illinois at...	3	25	0.00%	0	0	0	0	25	0	0
S CAMP	University of Illinois Sp...	4	1	0.00%	0	0	0	0	0	0	1
U CAMP	University of Illinois at...	1	71,365,331	99.99%	1,500	0	1,080	71,362,5...	150	0	16
UN CAMP	University of Illinois Sy...	2	9,131	0.01%	0	0	525	8,580	25	0	1

1. Degree

Degree information is the most fundamental building block of affiliation scoring. Degree information is displayed on the Education tab of the constituent record and is imported from the University of Illinois Banner System.

Affiliations By Advancement Unit (9) More

Advancement Un...	Advancement Unit Description	Rank	Total Score	Percentage	Degree
U OTHR	Other Campus Units	7	1	0.07%	0
U MEDIA	Media	6	75	4.94%	0
U CAMP	University of Illinois at Urbana-C...	4	110	7.25%	0
U BUSN	Business	7	1	0.07%	0
U ACES	Agricultural, Consumer, and Envi...	3	150	9.88%	0
F UIF	Foundation	2	330	21.74%	0
C DENT	Dentistry	1	750	49.41%	750
C CAMP	University of Illinois at Chicago	5	100	6.59%	0
A UIAA	Alumni Association	7	1	0.07%	0

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Points are awarded as follows:

Degree (major)

500 points to unit per major. Awarded upon graduation to the site and to the current advancement unit, not the granting advancement unit when a department or college has moved; this includes 500 points to each major within a double major.

Degree UIC Honors College

250 points to unit per degree. Awarded to the UIC Honors College for Honors College participants.

> ***Known Issue:*** *Honors programs display in the Educational Involvement field of the Education tab on an individual record. Unit-based honors programs begin with the unit's acronym.*

Unit-Based Honors Programs

250 points to unit per degree. Awarded to the relevant advancement unit for the unit-based honors programs.

> ***Known Issue:*** *Currently, departmental honors programs will only be awarded points at the unit level since there is no current way to tag an honors program participation in TED with a departmental level site.*

University of Illinois Chicago Graduate College

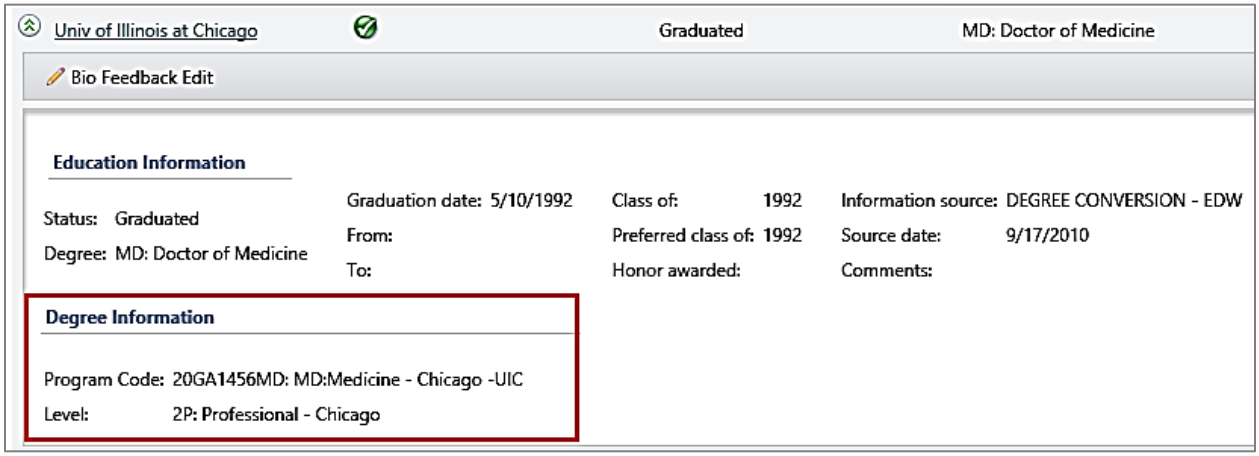
250 points to unit per degree awarded to the UIC Graduate College for all Graduate and Professional programs.

Medicine, MBA, MEngr, MPH, and MSW degrees are not awarded Graduate College Points.

2G and 2P programs are Graduate and Professional degree levels. The degree level is found in the Degree Information of the degree record on the constituent’s Education Tab.

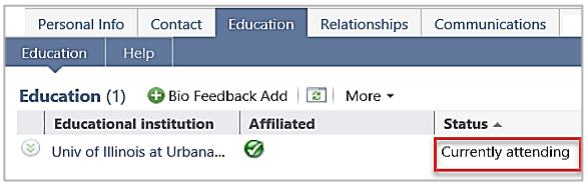
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Current Students

100 points to unit per degree awarded for current students with the status of Currently Attending.

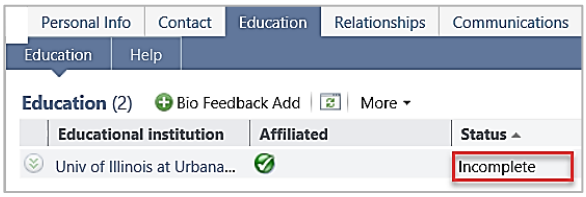


Attendees

100 points to unit per degree awarded to all previous attendees with a status of Incomplete.

Minors

0 points per minor.



Known Issue: *Minor data in TED does not include a site to which to award affiliation points. Should data become available, the Affiliations team will revisit awarding points to units where the minors are offered.*

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2. Employment

Employment information is displayed on the Relationships tab of the constituent record and is imported from the University of Illinois Banner System. The University Appointments data import process is scheduled to be run monthly by the UIF AIMS department.

Points are awarded for University Appointments in the units in which the appointments are held.

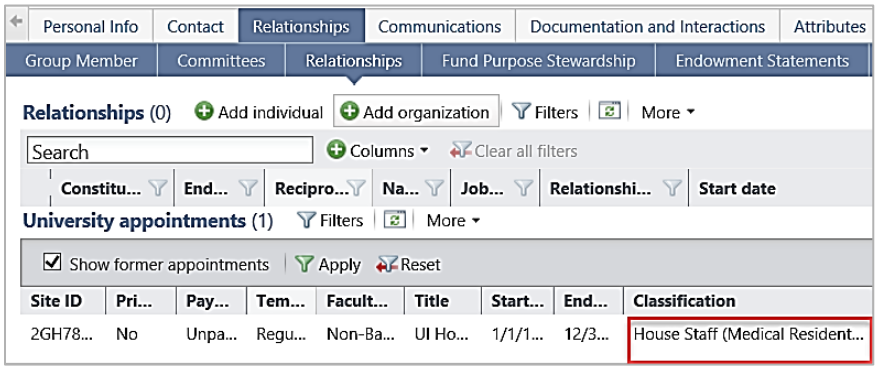
Affiliations By Advancement Unit (20) More

Advancement Un...	Advancement Unit Descrip...	Rank	Total Score	Percentage	Degree	Employment
U INFOS	School of Information Scienc...	1	18,780	40.56%	0	0
U LAS	Liberal Arts and Sciences	2	10,076	21.76%	500	1,600
U FAA	Fine and Applied Arts	3	9,147	19.76%	0	0
U IPM	Illinois Public Media	4	5,535	11.95%	0	0
U VCIA	Vice Chancellor for Institutio...	5	1,150	2.48%	0	900
F UIF	Foundation	6	800	1.73%	0	0
U EDUC	Education	7	166	0.36%	0	0

Points are awarded as follows:

Residents/Interns

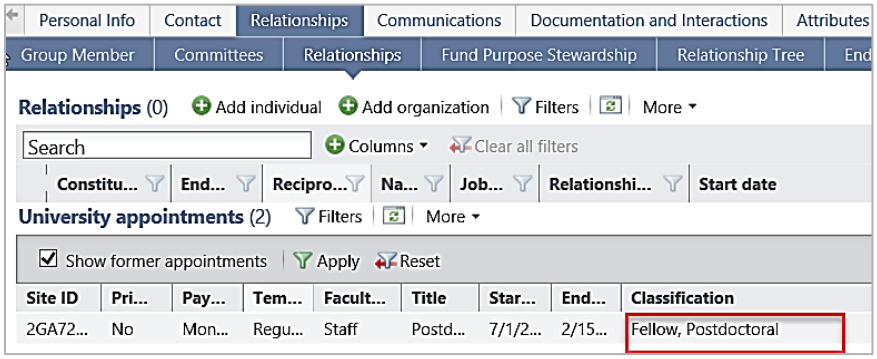
500 points once per site with the following classifications: House Staff (Medical Residents and Interns). The point total for Residents is intended to equal that of a degree.



Fellows

500 points once per site with the following classifications: Fellow, Postdoctoral; Postdoctoral Intern. The point total for Fellows (postdoc) is intended to equal that of a degree.

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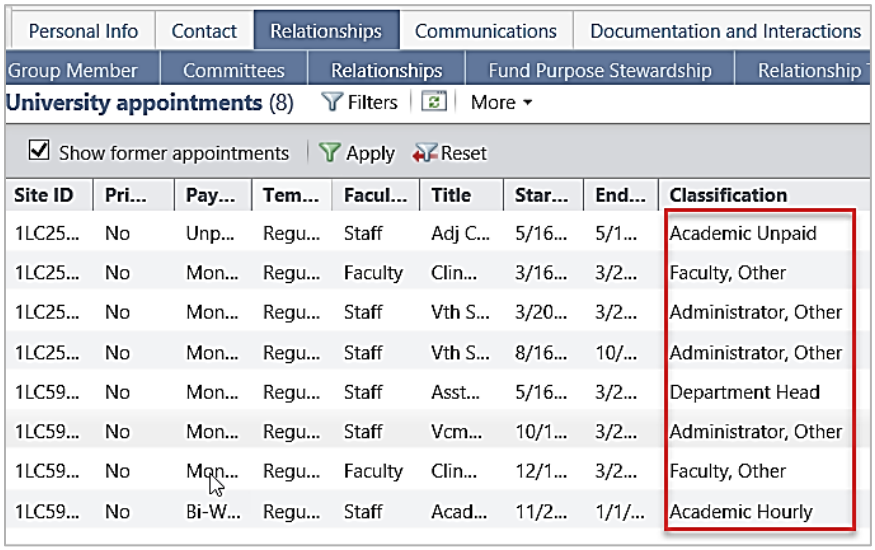
Faculty/Staff (Excluding Fellows/Residents/Interns and Students)

100 points per fiscal year per site. This includes zero percent appointments with the following classifications:

- Academic Hourly
- Academic Professional
- Academic Unpaid
- Administrator, Other
- Library Faculty, Other
- Library Faculty, Tenured
- Library Faculty, Tenure-track
- Nonacademic, Established
- Department Head
- Faculty, Other
- Faculty, Tenured
- Faculty, Tenure-track
- Nonacademic, Negotiated
- Nonacademic, Open range
- Nonacademic, Prevailing
- RAMP Administrator

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Student Employment

50 points per fiscal year per site with the following classifications:

- Fellow, Predoctoral
- Fellow, Trainee
- Graduate Assistant, Pre-professional
- Graduate Clinical Assistant
- Graduate Teaching Assistant
- Graduate/Undergraduate Other
- Undergraduate Student Employee, Part-time Hourly
- Graduate Teaching Assistant, Required

Retirees/Annuitants/Special Pay Employee/ Day Worker

0 points for any employees with these classifications.

3. Engagement

Important engagement with the University may occur outside events. Some examples are participation in a board or committee, speaking in a classroom, and advocating through Illinois Connection on behalf of the institution. All associated committees must have a group type of UI Involvement.

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Points are awarded as follows:

Affiliations By Advancement Unit (20) | More

Advancement Un...	Advancement Unit Descrip...	Rank	Total Score	Percentage	Engagement
U INFOS	School of Information Scienc...	1	18,780	40.56%	75
U LAS	Liberal Arts and Sciences	2	10,076	21.76%	275
U FAA	Fine and Applied Arts	3	9,147	19.76%	0
U IPM	Illinois Public Media	4	5,535	11.95%	0
U VCIA	Vice Chancellor for Institutio...	5	1,150	2.48%	0

Committee

University of Illinois Governing Boards

UIF Foundation Board

Details | Contact | Relationships | Attributes | Communications | Revenue | Memberships | Prospect

Attributes (4) | More

Category	Attribute group	Value
Committee Type		Volunteer
Committee Type		Board / Committee
Committee Type		Participant
Committee Type		Governing

200 points per fiscal year for each year of participation in any of the following boards: UI Board of Trustees, UI Foundation Board, UI Alumni Alliance Board. Governing Board committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, and Governing. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

University of Illinois Campaign Committees

S Reaching Stellar Campaign Committee

Details | Contact | Relationships | Attributes | Communications | Revenue | Memberships | Prospect

Attributes (5) | More

Category	Attribute group	Value
Committee Type		Development
Committee Type		Volunteer
Committee Type		Participant
Committee Type		Board / Committee
Committee Type		Reaching Stellar Campaign

100 points per fiscal year for each year of participation. Campaign committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, Development, and one of With Illinois, Ignite, Reaching Stellar, Brilliant Futures, Campaign Illinois, or Campaign for Illinois. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

Alumni Association/ Alliance Alumni Club Leadership

100 points per fiscal year for each year of participation. Alumni Association/Alliance Alumni Club Leadership committees must have the following committee type attributes: Participant, Volunteer, Board/Committee, Alumni, and Alumni Club. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.

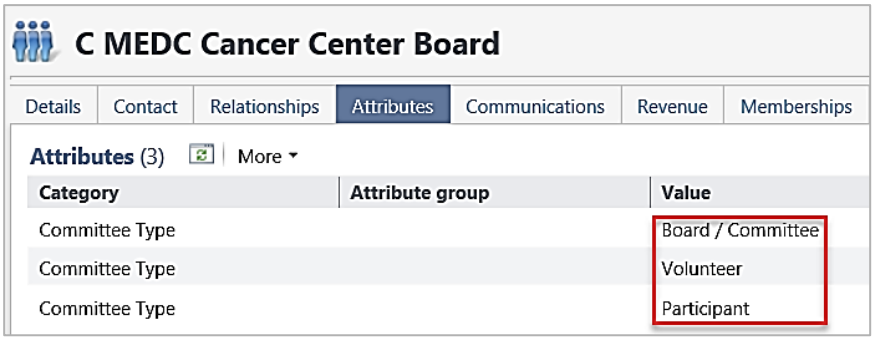
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University Unit Board or Committee

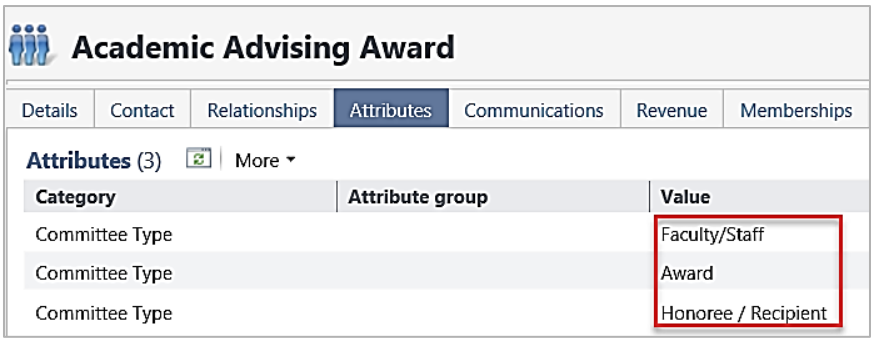
75 points per fiscal year for each year of participation. University Board committees must have the following committee type attributes: Participant, Volunteer, and Board/Committee. Points are awarded for governing boards, campaign committees, and alumni club leadership; however, they are not awarded a second time under the unit board or committee category. The following group member roles are excluded: Prospect or Declined Membership. The following attribute is excluded: Student.





University Faculty/Staff Award

100 points per award received. University Faculty/Staff Award committees must have the following committee type attributes: Honoree/Recipient, Award, and Faculty/Staff. The group member role must be Recipient.

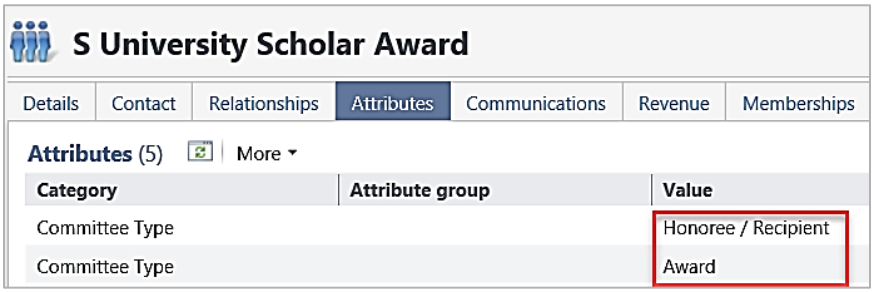


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University Constituent Award

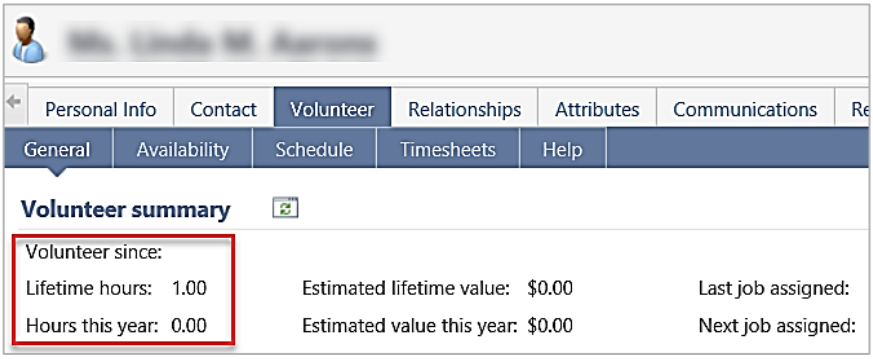
100 points per award received, beyond faculty/staff or student awards. University Constituent Award committees must have the following committee type attributes: Honoree/Recipient, and Award. Group member role must be Recipient. The following attributes are excluded: Faculty/Staff, and Student.



Volunteer

Individual Volunteer Activity

20 points per hour of activity with the University. The volunteer types considered are Illinois Connection Advocate (UIAA), Mentor &Speaker/Facilitator. These chosen types have not changed since Affiliations were accessible in TED.



4. Giving

Previous giving—specifically recent giving—is the largest contributing factor in affiliations scores. Points are awarded using household giving; therefore, each household member's affiliation points will be the same and reflective of giving for the entire household. This is the only affiliation calculation that is not calculated at the individual level.

Affiliations By Advancement Unit (20) More

Advancement Un...	Advancement Unit Descrip...	Rank	Total Score	Percentage	Giving
U INFOS	School of Information Scienc...	1	18,780	40.56%	18,703
U LAS	Liberal Arts and Sciences	2	10,076	21.76%	7,049
U FAA	Fine and Applied Arts	3	9,147	19.76%	9,135
U IPM	Illinois Public Media	4	5,535	11.95%	5,535
U VCIA	Vice Chancellor for Institutio...	5	1,150	2.48%	0
F UIF	Foundation	6	800	1.73%	0

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Points are awarded as follows:

Recent Giving: 1 point per dollar within the current year and the five most recent fiscal years, with no maximum number of points.

Past Giving: 0.33 points to unit per dollar for all years before the most recent five fiscal years, with no maximum number of points.

5. Events

Events are one of the most common forms of engagement for constituents with the university system.

Affiliations By Advancement Unit (20) | More

Advancement Un...	Advancement Unit Descrip...	Rank	Total Score	Percentage	Event Attendee
U INFOS	School of Information Scienc...	1	18,780	40.56%	0
U LAS	Liberal Arts and Sciences	2	10,076	21.76%	650
U FAA	Fine and Applied Arts	3	9,147	19.76%	0
U IPM	Illinois Public Media	4	5,535	11.95%	0
U VCIA	Vice Chancellor for Institutio...	5	1,150	2.48%	250
F UIF	Foundation	6	800	1.73%	800

Points are awarded as follows:

Recent Event: 25 points per event attended for the current fiscal year, plus the previous five fiscal years.

Past Event: 8.33 points per event attended for all years before the most recent five fiscal years, with no maximum number of points. Past events (like past giving) are worth one-third the points of recent events.

6. Student Involvement

Highly engaged students are often highly engaged alumni. All associated student committees must have a group type of UI Involvement to contribute affiliations points.

Affiliations By Advancement Unit (5) | More

Advancement Unit...	Advancement Unit Description	Rank	Total Score	Percentage	Student Involvement
U DIA	Division of Intercollegiate Athletics	1	1,132	56.83%	200
U AHS	Applied Health Sciences	2	500	25.10%	0
C ATHL	Intercollegiate Athletics	3	200	10.04%	0
U VMED	Veterinary Medicine	4	110	5.52%	0
A UIAA	Alumni Association	5	50	2.51%	0

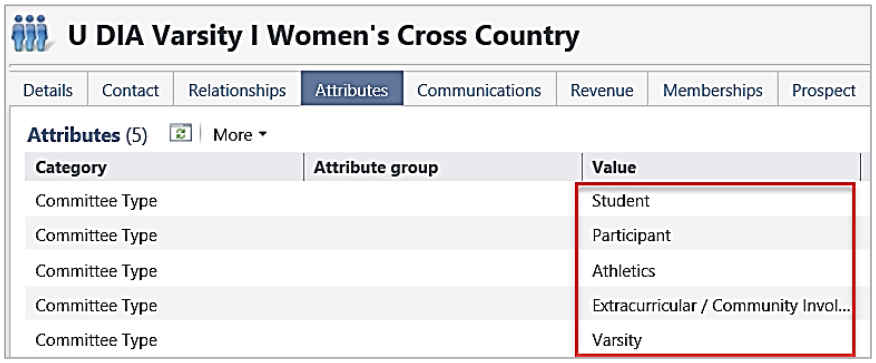
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Points are awarded as follows:

Student Athletics

100 points per fiscal year of participation in a University of Illinois varsity athletics team, awarded to athletics. Student Athletics committees must have the following committee type attributes: Participant Extracurricular/Community, Athletics, Varsity, and Student.



Student Awards

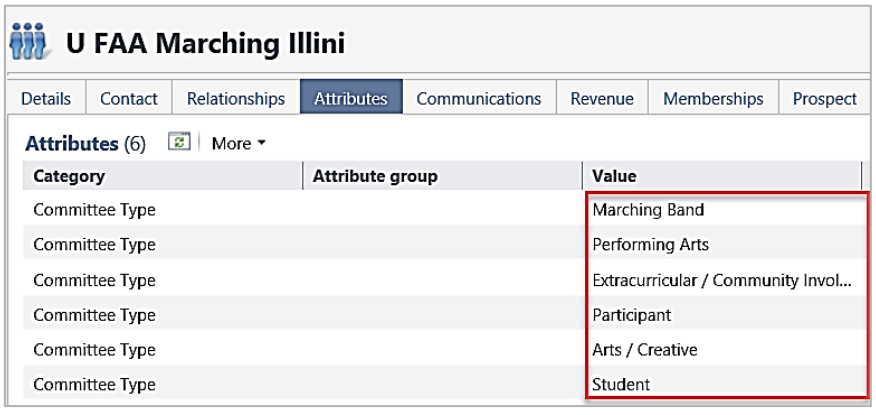
100 points per award for each award received.

This is not to be confused with financial awards or scholarships. Student Awards (Non-Financial) must have the following committee type attributes: Honoree/Recipient, Award, and Student. Constituents must have a group member role of Recipient.



Student Marching/ Pep Band

100 points per fiscal year of participation in a marching or pep band, awarded to the unit where band activity is managed, typically within the music department at the university. Student Marching/Pep Band must have the following committee type attributes: Participant, Extracurricular/Community, Marching band, Arts/Creative, Performing Arts, and Student.



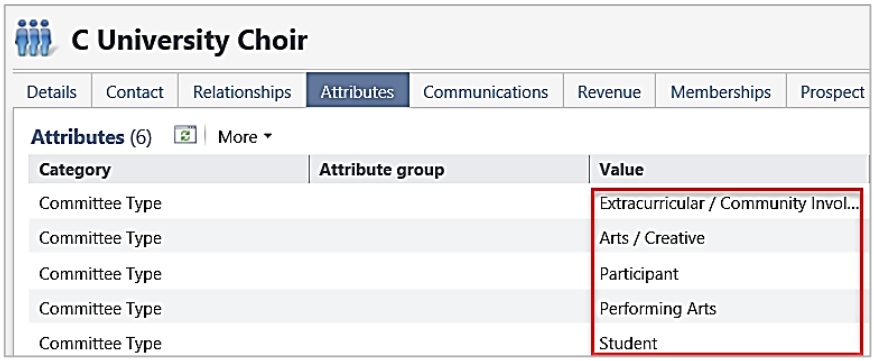
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25 points per fiscal year of participation in a marching or pep band, awarded to Athletics. Student Marching/Pep Band Athletics association must have the following committee type attributes: Participant, Extracurricular/Community, Marching Band, Arts/Creative, Performing Arts, and Student.

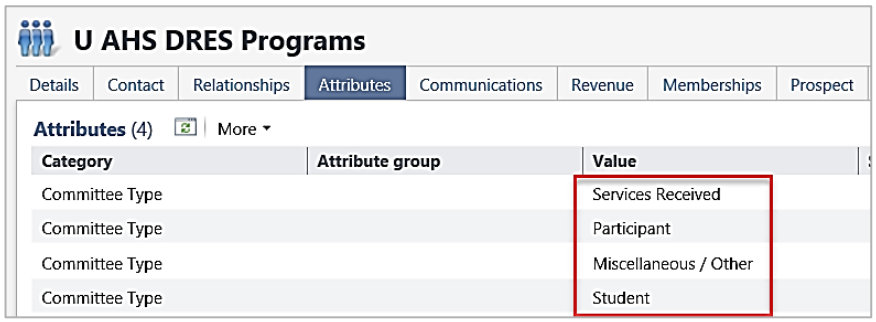
These points are awarded at the same time to both units due to the nature of pep/marching bands and their participation with athletics programs.

Performing Arts



50 points per fiscal year of participation in a University performing arts program. Performing Arts committees must have the following committee type attributes: Participant, Extracurricular/Community, Arts/Creative, Performing Arts, and Student. The following attribute is excluded: Marching Band.

Services Received

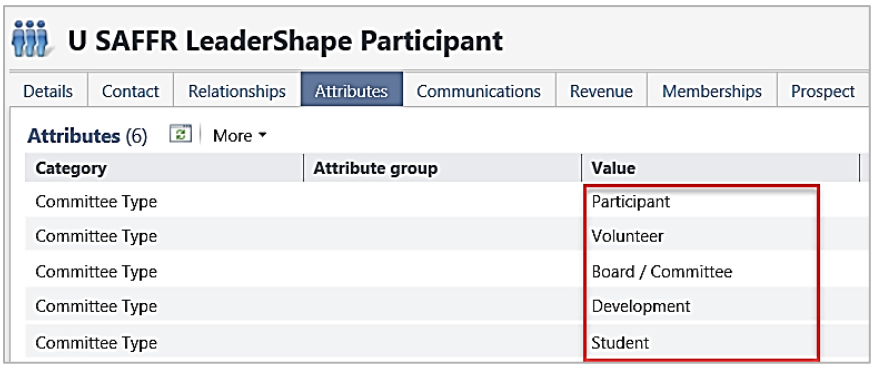


50 points per fiscal year of participation in a service offered by the University. Services Received committees must have the following committee type attributes: Participant, Miscellaneous/Other, Services Received, and Student. The following group member roles are excluded: Prospect or Declined Membership.

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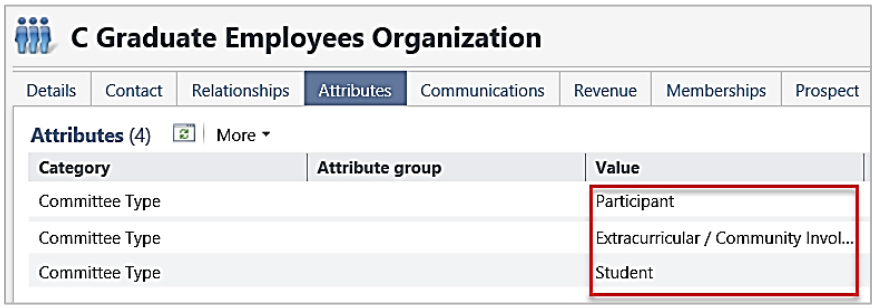
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Student Advancement or Leadership Committee



50 points per fiscal year of participation in any University Advancement or Leadership Committee/Program. Student Advancement or Leadership committees have the following committee type attributes: Participant, Volunteer, Board/Committee, Development or Alumni, and Student. The following roles are excluded: Prospect or Declined Membership.

Student Registered or Official Student Organization (SRO)



50 points per fiscal year of participation in any other University registered or official student organization. SRO committees have the following committee type attributes: Participant, Extracurricular/Community or Volunteer, and Student. The following group member roles are excluded: Prospect or Declined Membership. Committees counting in other Student Involvement subcategories will also not receive points as an SRO. Affiliation is based on the site on the committee record (located on the site sub-tab).

7. Interests

These points reflect unit-identified or constituent self-identified constituent interests with the institution. These pieces of information more closely move the Advancement program toward being able to execute interest-based engagement and philanthropy strategies.

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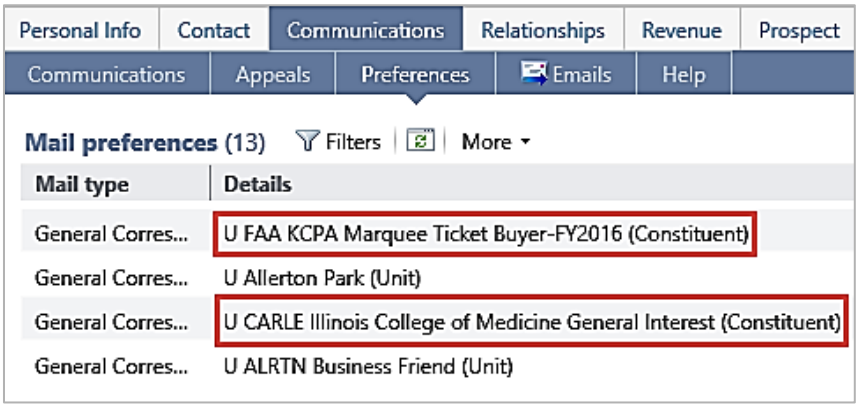
Affiliations By Advancement Unit (20) | More

Advancement Un...	Advancement Unit Descrip...	Rank	Total Score	Percentage	Interests
U INFOS	School of Information Scienc...	1	18,780	40.56%	2
U LAS	Liberal Arts and Sciences	2	10,076	21.76%	2
U FAA	Fine and Applied Arts	3	9,147	19.76%	12
U IPM	Illinois Public Media	4	5,535	11.95%	0
U VCIA	Vice Chancellor for Institutio...	5	1,150	2.48%	0
F UIF	Foundation	6	800	1.73%	0

Points are awarded as follows:

Self-Identified Opt-Ins

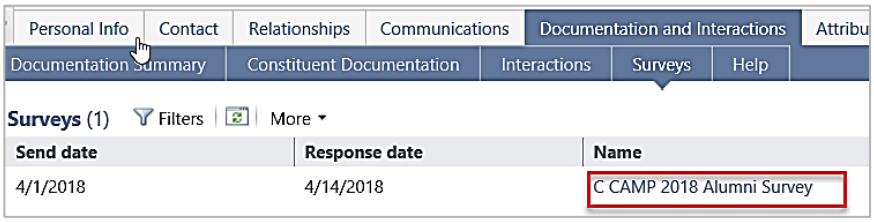
10 points once for each opt-in a constituent has completed, including annual purchases of tickets, or utilizing an Urbana Vet Med clinic. In TED these are referred to as mail preferences.



Known Issue: *Ticket buyer and client data is being addressed in another project, ITG-430 External Data Integration, and once housed/structured can be re-addressed to more accurately award affiliations points for things like repeat client's visits, single ticket buyers vs. season ticket buyers, two-seat purchases vs. 10-seat purchases, etc.*

Surveys

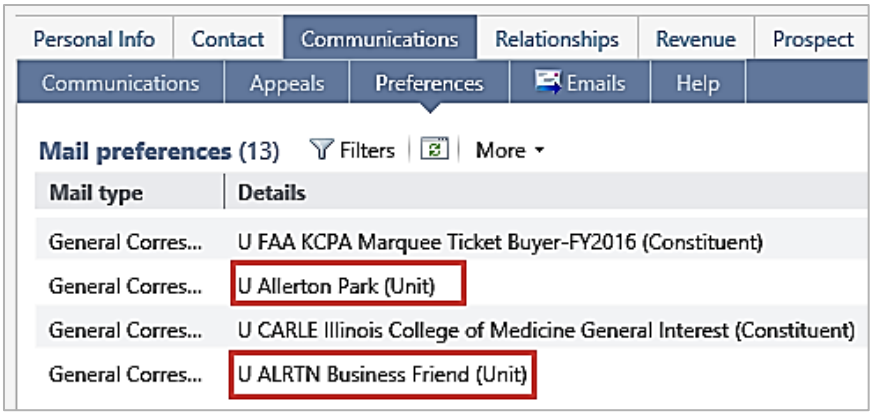
5 points for each survey to which a constituent has responded.



Survey information can be found on the Surveys sub-tab of the Documentation and Interactions tab of a constituent's individual record.

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Unit-Identified Opt-Ins

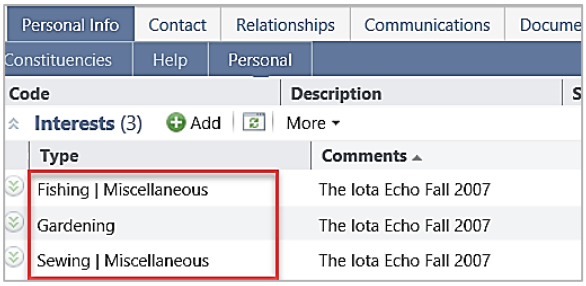


1 point for each opt-in a unit has added to a constituent's record. In TED these are referred to as mail preferences.

Units may request to have an opt-in mail preference code for their unit added to a constituent under the following circumstances:

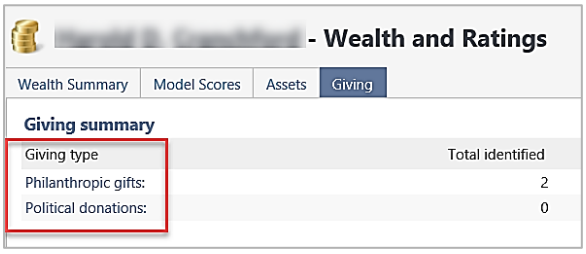
- Evidence of constituent interest in that unit exists (giving to others, field of employment, publicly stated interest, grateful patients, etc.)
- Unit staff wants to engage constituents in marketing initiatives.

Personal Interest



10 points per interest for each personal info interest. Personal interest areas were reviewed, and appropriate sites were applied to each, if applicable. To receive Personal Interest affiliation points, the constituent must have at least 500 affiliation points to that University in other areas; a constituent meeting these criteria for multiple universities can have applicable sites across universities. Personal Interest may not be directly associated with a constituent's relationship with UI but can reveal donors' passions and align them with a current (or future) UI cause or initiative.

Philanthropic Giving



10 points per category for each philanthropic gift category to other organizations (philanthropic giving to others). Philanthropic Giving categories were reviewed, and appropriate sites were applied to each, if applicable. To receive Philanthropic Giving affiliation points, the constituent must have at least 500 affiliation points to that University in other areas. A constituent meeting these criteria for multiple Universities can have applicable sites across universities. Philanthropic Giving may not be directly associated with a constituent's relationship with UI, but

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can reveal donors' passions and align them with a current (or future) UI cause or initiative.

When Philanthropic Giving is rolled-up to the household, it is only reflected once per Category.

Parent Interest

Parent Interest Athletics, Degree, Marching Band, Marching Band Athletics, Performing Arts and Services Received) uses areas of affiliations that already exist, and points are awarded to parents when there is a parent to child relationship in TED. Parents will receive 50% of a child's points for each Parent Interest mentioned above. Generally, there is only a parent to child relationship in TED when both a parent and a child have a relationship to UI and were linked from research performed or information provided by advancement staff. The family connection could be a strong engagement opportunity. When Parent Interests is rolled-up to the household, it is only reflected once if it is a two-member household.

REVIEWED 12/12/24

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ATTRIBUTES TAB

Documentation to be Determined

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COMMENTS TAB

Documentation to be Determined

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COMMUNICATIONS TAB

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SOCKETLAB EMAIL+ BOUNCES AND UNSUBSCRIBES

BOUNCES AND UNSUBSCRIBES GENERATED FROM SOCKETLAB EMAIL+

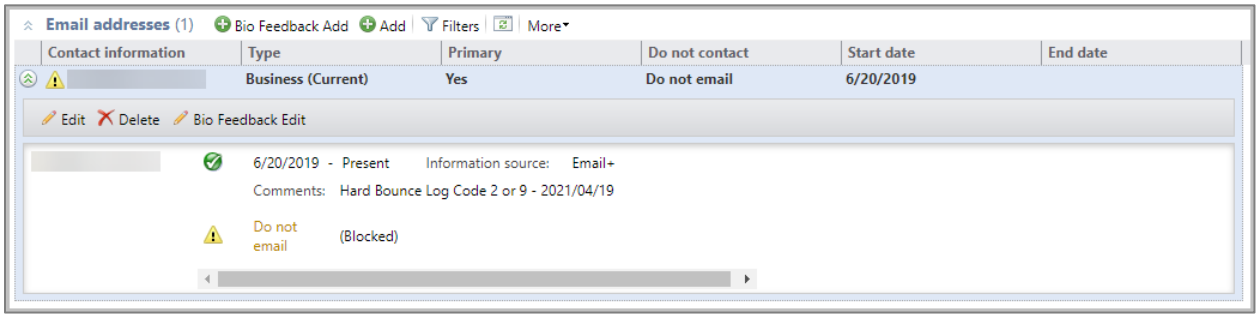
Email recipient errors and unsubscribes generated from Socketlab Email+ mass communications are managed by information sent from the Socketlab email delivery platform to TED. The errors (hard or soft bounces) and unsubscribes are analyzed and displayed in TED.

Bounces

Hard Bounces

If the email address is primary and comes back as a hard bounce, it is flagged as “Do not email.” No end date is applied because the primary email address cannot be end dated. You can see this result in the Email addresses section under the Contact tab in the constituent’s record. A notification of the hard bounce with the date of the bounce is added in the Comments section.

Log Codes:2 or 9 are considered as hard bounces.

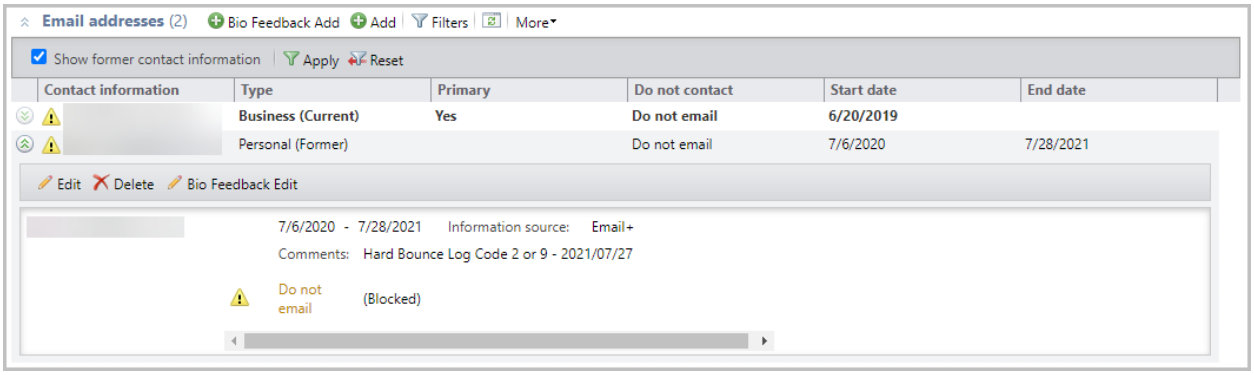


If a non-primary email address is active and comes back as a hard bounce, it is flagged as “Do not email” and given an end date. You can see this result in the Email addresses section under the Contact tab in the constituent’s record. A notification of the hard bounce with the date of the bounce is added in the Comments section.

Note: when a non-primary email address has been end dated it becomes inactive. You will have to apply the “Show former contact information” filter to see the expired email address.

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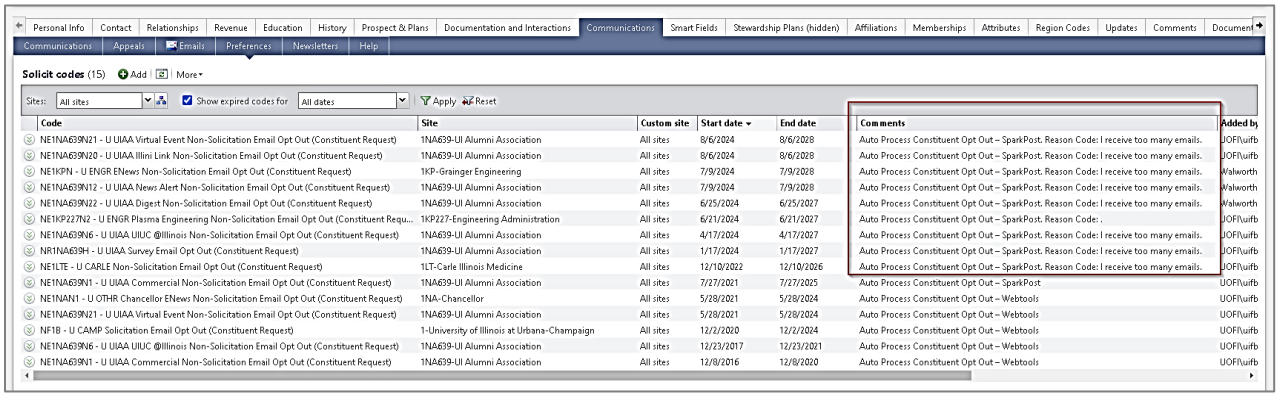
Soft Bounces

Email soft bounces (timeouts, full mailboxes, etc.) given from Socketlab Email+ are ignored in TED.

Unsubscribes

A Solicit Code is associated with every mass communication. When a user unsubscribes from the email, the Solicit Code is applied to the constituent's record. The applied Solicit Code can be found in the Preferences subtab under the Communications tab. In the Comments column of the Solicit codes section a comment of *"Auto Process Constituent Opt Out – SparkPost. Reason Code: I receive too many emails."*

Solicit Code Comments: **SparkPost will be changed in the future to SocketLab. The logic changed when we began to capture the unsubscribe reason code and thus added it to the comments.**



Logic for solicit code end date:

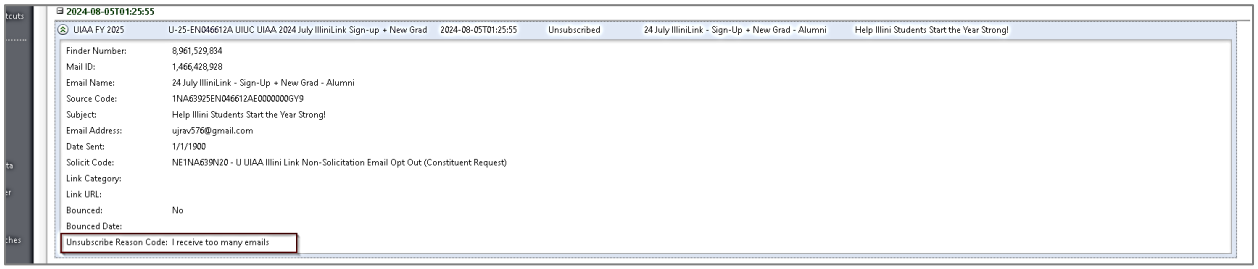
--If the first letter of SOLICITCODE is N and the current date month is greater than six, then increment current year by four.

--If the first letter of SOLICITCODE is N and the current date month is less than or equal to six, then increment current year by three.

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More details of the unsubscribe are illustrated in the Emails subtab under the Communications tab. Click on the down arrows of a mass communication effort with a Response Type of “Unsubscribed.



New enhancements added to capture the unsubscribe reason code:

- I receive too many emails.
- I do not find the content relevant.
- I cannot properly view this email.
- Too many emails from dept/coll/univ

Spam

If the Log Code is 3, it is considered Spam. We added a solicit code for spam as the unsubscribes. If the solicit code is associated with the marketing effort, then the batch process retrieves the code and adds it to the constituent record. If the solicit code is not linked to the marketing effort, then the records will be in the exception batch.

UPDATED 8/9/24

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COMMUNICATION OVERVIEW

TYING IT ALL TOGETHER

Communicating with our Constituents is an important component of engagement and fundraising. Communications include a variety of methods - mailings, invitations, newsletters, phone calls, emails, and in-person visits.

The University of Illinois Foundation Engagement department provides mass communication lists for requesting units for all three universities. A mass communication list is defined as the same message sent to 20 or more people.

Many components affect communications with our constituents. Following is an overview of each area in TED that can affect communication and mass communication lists. Full documentation is available for each of these areas.

Contents

Mail Preferences 206

Solicit Codes 207

Do Not Contact 209

Personal Info & Contact Information 210

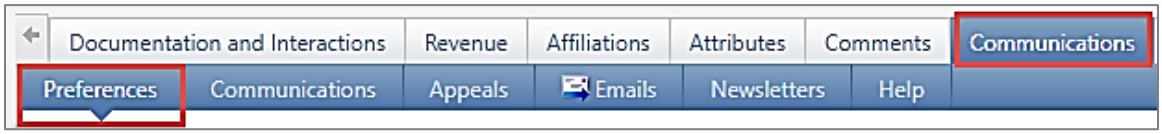
Requesting Mass Communication Lists 212

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Mail Preferences

To include a constituent in a specific mailing or communication piece, a Mail Preference can be added to a constituent record. Located on the Communications tab, Preferences sub-tab, Mail Preferences are also known as opt-ins.





Mail type	Details	Send	Delivery method	Selected address	Send to seasonal
General Correspondence	UIAA Alumni Tour Intere...	Yes	Mail		No
General Correspondence	@Illinois E-News (Const...	Yes	Mail		No
General Correspondence	U College of Business In...	Yes	Mail		No
General Correspondence	Beckman Christmas Car...	Yes	Mail	Primary Address	Yes

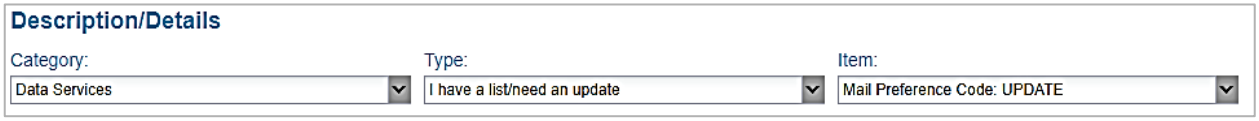
Included in the name of a Mail Preference (details column above) are unit short name, a brief description and a reference if they come from the unit or constituent.

Examples of Mail Preferences:

U ENG Spectrum Scholarship Brochure (Unit)
U VCIA Stewardship Scholarships (Constituent)

To have a Mail Preference added or removed from a constituent's record, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.

No date is associated with mail preferences, so once on a record they will remain until removed.



Many mail preferences are available in TED, however if your Advancement Unit requires a new Mail Preference to be created, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



When mass communication lists are pulled, Mail Preferences on a constituent's record are applied to **all** active addresses on file for the constituent.

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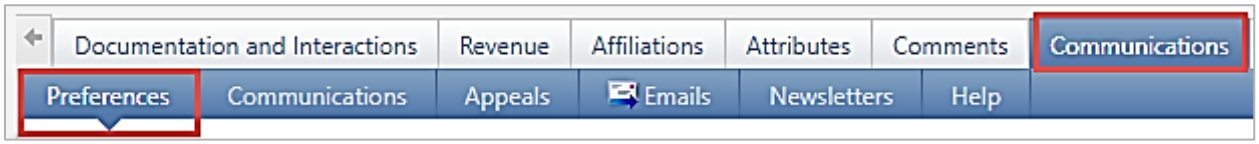
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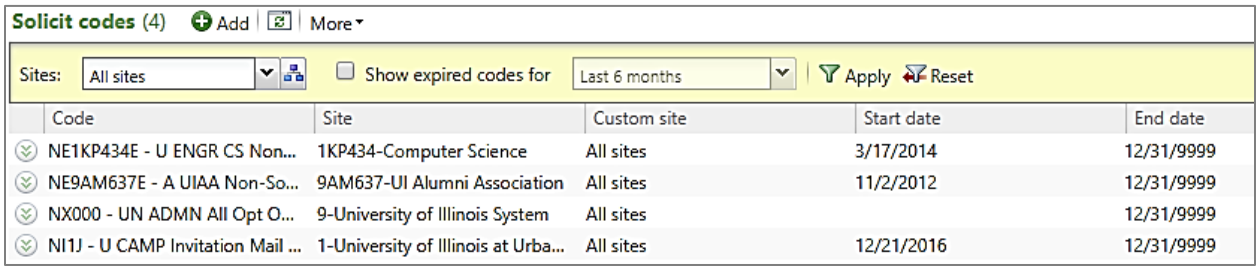
Note: Mail Preferences can only be added to existing records in TED. If no record exists in TED, you can include the Mail Preference you want added in the Bio Feedback Add an individual request on the Comments tab.

Solicit Codes

To prevent a constituent from receiving certain kinds of mass communications, a Solicit code can be added to a record. Located on the Communications tab, Preferences sub-tab, Solicit codes are also known as opt-outs. Solicit codes exclude based on communication type:

- Phone
- Email
- Solicitations
- Non-Solicitations
- Invitations
- Surveys
- Directories
- All Contact





Included in the name of a Solicit code are unit short name, a brief description, and if they are requested by the unit or constituent.

Some Solicit code descriptions cover a broader reach- i.e. *Solicitation Phone Opt Out,* and some Solicit codes refer to a specific target – i.e. *UIC Alumni Magazine Opt Out.*

A site is attached to each Solicit code and are by Global (UI System), University, College or Department Level.

Examples of Solicit codes:
NB4PHF - S LAS Non-Solicitation Phone Opt Out (Constituent Request)
ND1KV377R - U LAS Plant Biology Directory Opt Out (Constituent Request)

Solicit codes have a start date and end date on the constituent's record.

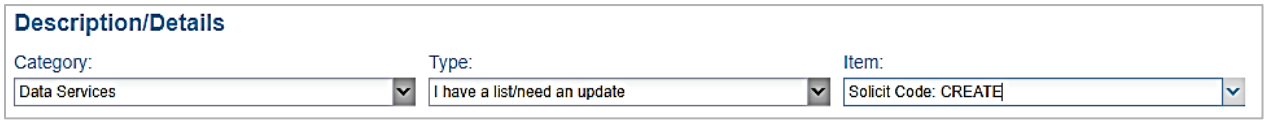
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To have a Solicit code added or removed from a constituent's record, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below. Requests are processed by the University Annual Giving Department.



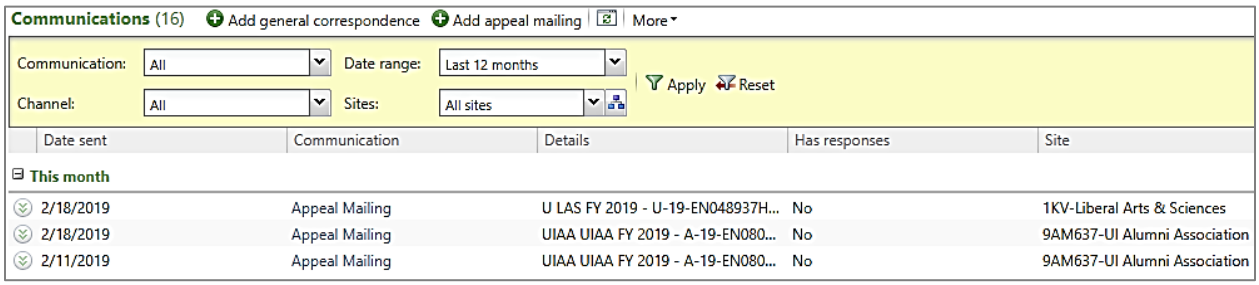
Many Solicit codes are available in TED, however if your Advancement Unit requires a new Solicit code to be created, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



When mass communication lists are pulled, solicit codes on a constituent's record are applied to **all** active addresses, phone or email on file for the constituent (depending on the type of Solicit code).

History of Communications, Appeals, Emails Sent

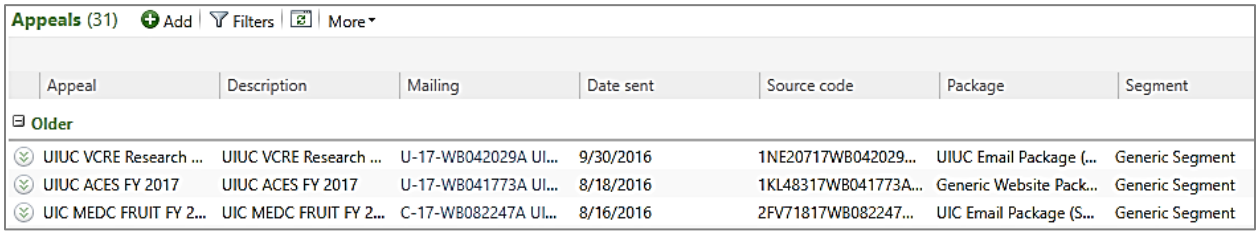
A history of communications sent are stored on the Communications tab, Communication sub-tab of the constituent's record. Filter by communication, type, date range or site. Click the link (Communication column) to view more details about the mailing or communication.



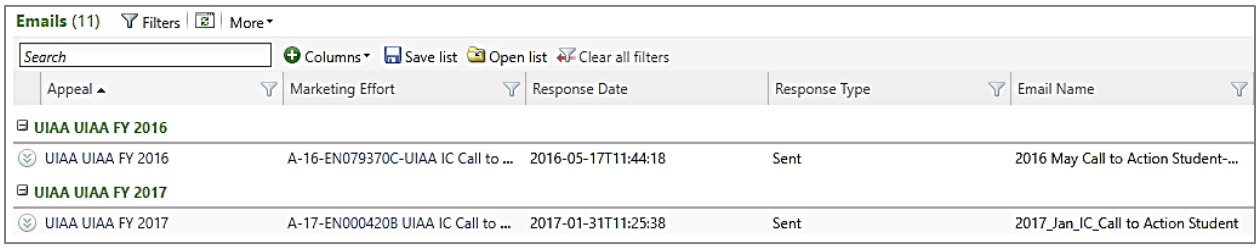
Appeals (mass communications) sent to a constituent can be seen on the Communications tab, Appeals sub-tab of the constituent's record. Click the link (Mailing column) to view more details about the appeal.

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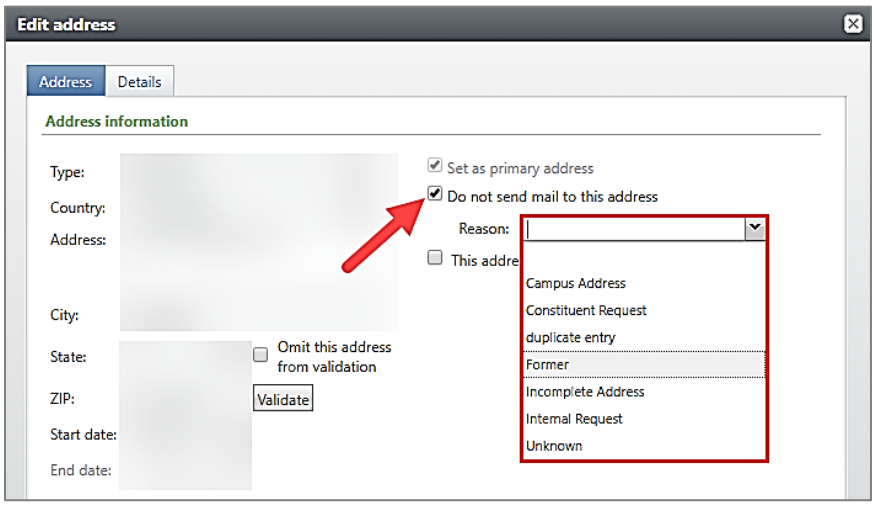
Mass communication emails sent to a constituent through Webtools/Email+ can be seen on the Communications tab, Emails sub-tab of the constituent's record. Click the chevron button on the left to view more details about the email.



Do Not Contact

These options are available on the Contact tab:

Do not send mail to this address (aka: Do Not Mail) – This indicates to Advancement staff that even though a particular address is/was a valid address, it should not be used for mailings. This option applies only to the specific address marked.



Mark an address as Do not send mail to this address if:

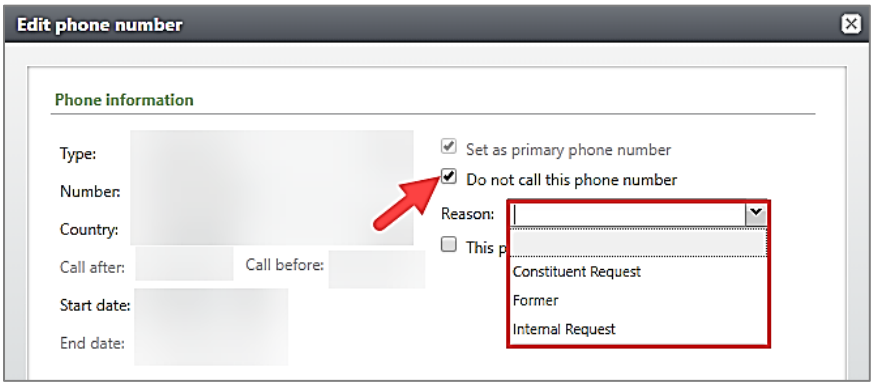
- The constituent has asked us not to mail to them at that specific address.
- A unit has determined that an address won't be used.
- When a new or "good" address is not available, such as returned mail. NOTE – If mail is returned with a new address, then the new address should be entered, and the old address end dated. It is not necessary to mark it as do not mail because the end date will prevent the address from being used.

Include the Reason when marking the Do not send mail to this address.

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Do not call this phone number

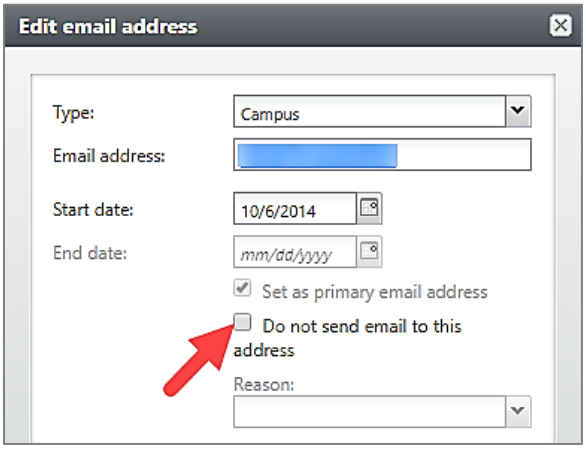


Mark a number as Do not call this phone number if:

- The constituent has asked us not to call to them at that specific number.
- A unit has determined that a phone number won't be used.
- When a new or "good" phone number is not available.

Include the Reason when marking the Do not call this phone number.

Do not send email to this address – Similar to the above, but for the constituent email addresses.



- The constituent has asked us not to email to them at that specific email address
- A unit has determined that an email won't be used.
- When a new or "good" email is not available.

IMPORTANT – When mass communication lists are pulled, Mail Preferences and Solicit Codes on a constituent's record are applied to **all** addresses on file (or phone, email depending on the type of code).

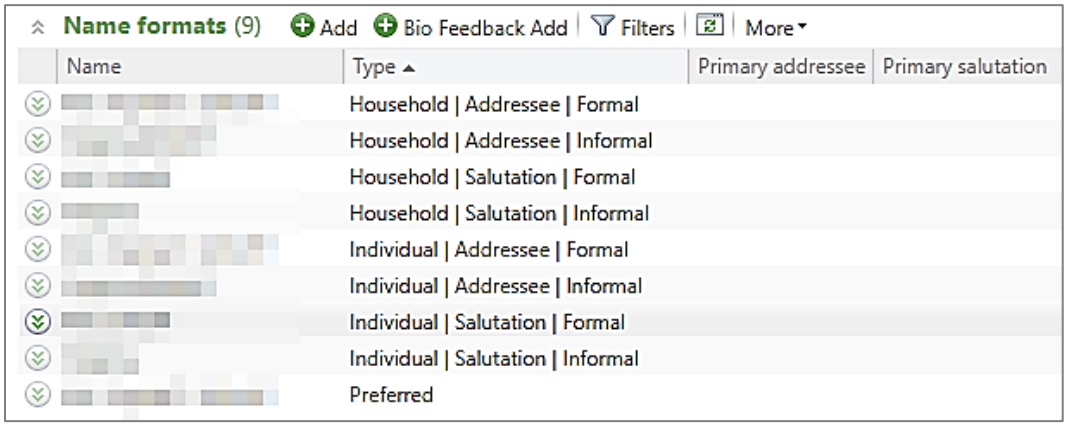
The *Do not send mail* option does not apply to all addresses for a constituent (or phone, email), but only on the specific address that has been marked.

Personal Info & Contact Information

Names used in mass communication come from the Name Formats located on Personal Info tab. Name formats on the constituent's record allow for formal or informal names to be used, depending on the type of communication. Other name formats are available. For more information, see the Name Format documentation.

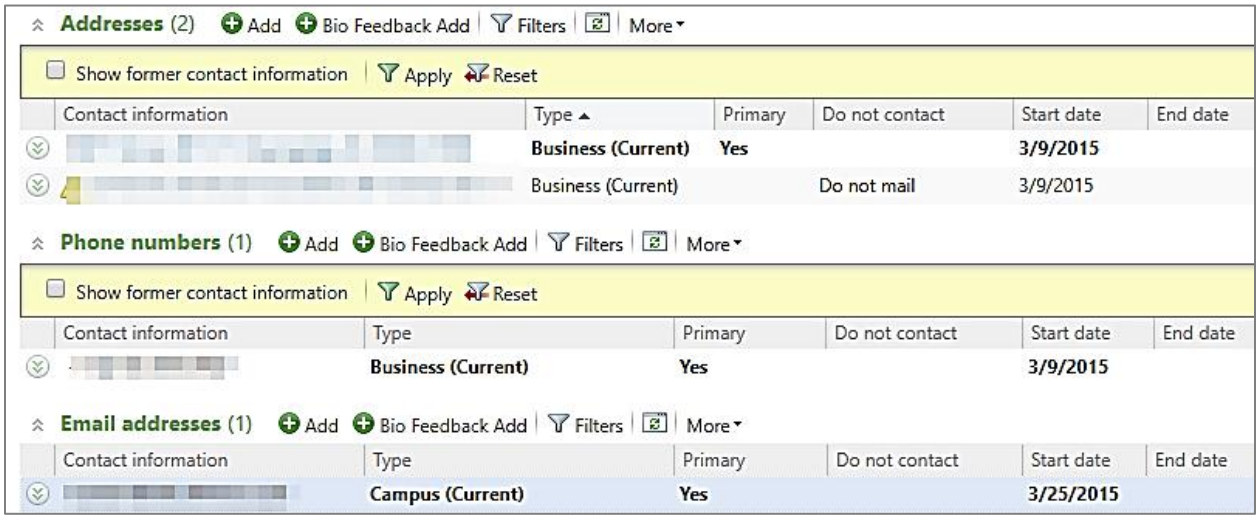
UNIVERSITY OF ILLINOIS FOUNDATION | UIC UIS

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Deceased constituents are excluded from mass communication. Constituents are marked as deceased on the Personal Info tab.

Constituent contact information – address, phone or email - are stored on the Contact tab. Contact information with past end dates are not used. Communication method (mail/email/phone) is affected by type (residence, business). Seasonal information can also affect communications.



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Requesting Mass Communication Lists

Units meet with the UIF Engagement team to develop and plan for mass communications each fiscal year. For communication requests for units without a scheduled plan, submit a request through the Mass Communication Work Order Request Form:
https://app.smartsheet.com/b/form/06c1fb82d266475d955535832677a34f

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MAIL PREFERENCES

INCLUDING CONSTITUENTS IN UNIT COMMUNICATIONS

Mail Preferences are used to include a constituent in a specific mailing, email, or communication piece (mass communication). Located on the Communications tab, Preferences sub-tab, Mail Preferences are also known as opt-ins.

Mail Preference Uses

Mail preference codes can be used for constituents who have expressed interest in a program. Examples of these -

- Allerton Plant Sale (Unit)
- C Theatre Program Interest (Unit)
- S Men's Basketball Int (Constituent)
- S WUIS Classics Email Recip (Unit)

Mail preferences can be used to handle subscriptions lists such as newsletters. Examples of these -

- C SPH Newsletter Recip. (Unit)
- S WUIS Weekly E-Newsletter (Constituent)
- U LAS Newsletter Include (Unit)

Examples of other types of mail preferences -

- C Leadership & Adv Invitations (Unit)
- U EDUC Holiday Cards (Unit)
- U UNIH Uni High Friends (Unit)
- S AUDTR Classic Rock Ticket Buyer-FY2017 (Unit)

In order to streamline the process and avoid confusion across multiple events, mail preferences were created for each of the ticket buyer categories instead of using individual events. For example, whether a person attended one or all the events for Dance, he/she would have the U FAA KCPA Dance Ticket Buyer FY2017 (Unit) Mail preference appended.

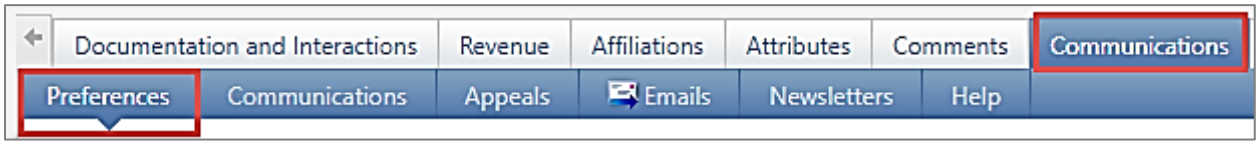
The name of a mail preference includes Constituent or Unit to indicate who has requested the constituent be included in this group or segment.

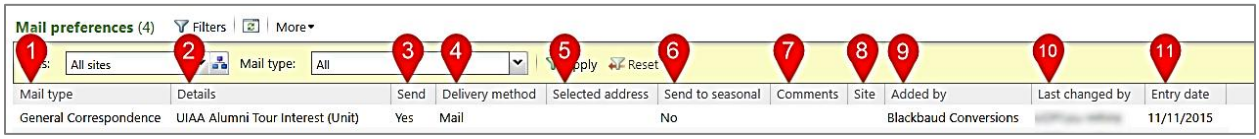
Viewing Mail Preferences

From a constituent record choose the Communications tab, Preferences sub-tab to view the mail preferences associated with a constituent record.

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1. Mail Type – Valid types include Receipts, General Correspondence
2. Details – Includes unit name, description, and indicates if requested by the unit or constituent
3. Send – **yes** or **no**
4. Delivery method – valid methods are **Email** or **Mail**
5. Selected address – can be left blank, set to primary address, or can be a specific address from the constituent record
6. Send to seasonal – **yes** or **no** (refers to Seasonal Address if one is on the record)
7. Comments – optional
8. Site – site id
9. Added by – User net ID that added the Mail Preference
10. Last changed by – User net ID that changed the Mail Preference
11. Entry date – Date Mail Preference was entered

Add or Remove a Mail Preference to a Constituent Record

To have a Mail Preference added or removed from a constituent's record, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below. No date is associated with a Mail Preference so once on a constituent record a Mail Preference will remain until removed.



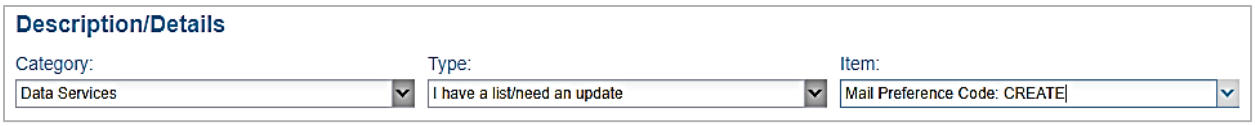
Note: Mail Preferences can only be added to existing records in TED. If no record exists in TED, you can include the Mail Preference you want added in the Bio Feedback Add an individual request on the Comments tab.

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Request a New Mail Preference

There are many types of mail preferences in TED, however if your Advancement Unit requires a new Mail Preference be created that does not already exist within TED, please log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



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SOLICIT CODES

EXCLUDING CONSTITUENTS FROM UNIT COMMUNICATIONS

Solicit codes prevent constituents from receiving certain kinds of mass communications – email, mailings, phone calls, or other contact. Located on the Communications tab, Preferences sub-tab, solicit codes are known as opt-outs.

Solicit Code Uses

Solicit codes are used to identify constituents who have asked to be removed from specific contact lists, or for units that would like them excluded. This can be something the constituent requested, or something the unit decided they did not want the constituent to receive. Individuals with these codes are excluded from corresponding mass communication lists provided by UIF. **Therefore, it is extremely important for units to receive their mass communication lists from UIF, to ensure that our constituent's requests to not receive a communication are honored.**

Solicit Code Expiration Dates

Solicit codes are given expiration dates, where they will "fall off" a record and therefore the record can again receive those communications after the expiration date. This can be anywhere from 3 years to indefinitely, depending on the request.

Note: Solicit codes are set to expire after 3 years if the code is added between January 1st and June 30th, or after 4 years if the code is added between July 1st and December 31st.

Examples of solicit codes:

- NX000 – UN ADMN All Opt Out (Constituent Request).
- NF2FQB – C ENGR Solicitation Email Opt Out (Constituent Request).
- NP2D – C CAMP Non-Solicitation Mail Opt Out (Constituent Request).
- NJ4PKK – S LIBR Invitation Email Opt Out (Constituent Request).
- NT1NA639O – A UIAA Alumni Welcome Center Survey Phone Opt Out (Constituent Request).

The name of a solicit code includes Constituent or Unit to indicate who has requested the constituent be excluded from this group or segment.

Solicit Code Structure

Solicit codes fall into three main categories:

- Mass communications
- Recognition
- Directory

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Each type functions outside of and separately from the other two.

Mass communication solicit codes are further categorized as to the objective of the communication: solicitation or non-solicitation; the method of the communication: mail, email, phone, text, or geofencing; and the level of the communication: university system, university, college, department, or program.

Solicit codes are added to a record in the least restrictive manner possible that will accomplish the constituent's request. This can be done by thoughtfully considering a) the type(s) of code(s) to be applied, b) the level of the applied code(s), and c) the duration of the applied code(s).

Solicit codes will consist of the Project Type (positions 1-2), the Site ID (positions 3, 3-5, or 3-8 depending on the level), and the Project Indicator (position 4, 6, or 9). If the Project Type, Site ID and Project Indicator need to be used more than once, a number will be added after the Project Indicator so the "code" portion is unique.

Category	Objective	Method	Project Type	Project Indicator	Code Definition
Mass Communication	All Objectives	All Methods	NX	X	All Opt Out (Constituent Request)
			KX		All Opt Out (Staff Request)
	Solicitation	Mail	NM	A	Solicitation Mail Opt Out (Constituent Request)
			KM		Solicitation Mail Opt Out (Staff Request)
		Email	NF	B	Solicitation Email Opt Out (Constituent Request)
			KF		Solicitation Email Opt Out (Staff Request)
		Phone	NC	C	Solicitation Phone Opt Out (Constituent Request)
			KC		Solicitation Phone Opt Out (Staff Request)
		Text	NA	T	Solicitation Text Opt Out (Constituent Request)
			KA		Solicitation Text Opt Out (Staff Request Request)
		Geofencing			Solicitation Geofencing Opt Out (Constituent Request)
					Solicitation Geofencing Opt Out (Staff Request)
	Non-Solicitation	Mail	NP	D	Non-Solicitation Mail Opt Out (Constituent Request)
			KP		Non-Solicitation Mail Opt Out (Staff Request)
		Email	NE	E	Non-Solicitation Email Opt Out (Constituent Request)
			KE		Non-Solicitation Email Opt Out (Staff Request)
		Phone	NB	F	Non-Solicitation Phone Opt Out (Constituent Request)
			KB		Non-Solicitation Phone Opt Out (Staff Request)
		Text	NG	U	Non-Solicitation Text Opt Out (Constituent Request)
			KG		Non-Solicitation Text Opt Out (Staff Request)
		Geofencing	NN	Z	Non-Solicitation Geofencing Opt Out (Constituent Request)
			NN		Non-Solicitation Geofencing Opt Out (Staff Request)
	Invitation	Mail	NI	J	Invitation Mail Opt Out (Constituent Request)
			KI		Invitation Mail Opt Out (Staff Request)
		Email	NJ	K	Invitation Email Opt Out (Constituent Request)
			KJ		Invitation Email Opt Out (Staff Request)
		Phone	NB	L	Invitation Phone Opt Out (Constituent Request)

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			KB		Invitation Phone Opt Out (Staff Request)
		Text	NH	V	Invitation Text Opt Out (Constituent Request)
			KH		Invitation Text Opt Out (Staff Request)
		Geofencing	NK	Y	Invitation Geofencing Opt Out (Constituent Request)
			KK		Invitation Geofencing Opt Out (Staff Request)
	Survey	Mail	NS	G	Survey Mail Opt Out (Constituent Request)
			KS		Survey Mail Opt Out (Staff Request)
		Email	NR	H	Survey Email Opt Out (Constituent Request)
			KR		Survey Email Opt Out (Staff Request)
		Phone	NT	I	Survey Phone Opt Out (Constituent Request)
			KT		Survey Phone Opt Out (Staff Request)
		Text	NQ	W	Survey Text Opt Out (Constituent Request)
			KQ		Survey Text Opt Out (Staff Request)
		Geofencing			Survey Geofencing Opt Out (Constituent Request)
					Survey Geofencing Opt Out (Staff Request)
Recognition	Donor Listing	In Print or Online	NL	S	Publicity Opt Out (Constituent Request)
Directory	Alumni or Professional Listing	In Print or Online	ND	R	Directory Opt Out (Constituent Request)

Mass Communication Solicit Codes

All Objective/All Method Codes (All Opt Out – NX Project Type)

Codes begin with an NX project type are the most exclusive when added to records and used in the production of data files to exclude individuals from mass communications for all objectives (solicitation or non-solicitation) and by all methods (mail, email, or phone). All Objective/All Method solicit codes descriptions end with All Opt Out.

Examples:

University system	*NX000 – UN ADMN All Opt Out (Constituent Request)*
University	*NX1X – U CAMP All Opt Out (Constituent Request)*
College	*NX2FQX – C ENGR All Opt Out (Constituent Request)*
Department	*NX1KP933X – U ENGR ECE All Opt Out (Constituent Request)*
Program	*NX4PL676P – S POLDR WUIS Member Card All Opt Out (Constituent Request):*

NX2FQX C ENGR All Opt Out. This is applied when someone doesn't want to receive any communications from the College of Engineering at UIC.

The NX111_UN ADMN Constituent Individual Household request opt out (Constituent Request) – 9-University of Illinois System signifies that these records are not receiving communications due to an "individual Household" request. This pulls the individual out of the solicitation list but not the household member that wants to receive communications.

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Solicitation Codes (Solicitation Opt Out – NM, NF, NC, NA Project Type)

Codes are added to records and used in the production of data files to exclude individuals from mass communications with the primary objective of asking University of Illinois constituents to make a financial gift to the University. The assigned project type is determined by the method of communication—NM (No Mail), NF (No Email), and NC (No Phone Calls), and NA (No Text Message).

Examples*:*

University system	*NM000 – UN ADMN Solicitation Mail Opt Out (Constituent Request)*
University	*NM1A – U CAMP Solicitation Mail Opt Out (Constituent Request)*
College	*NF2FQB – C ENGR Solicitation Email Opt Out (Constituent Request)*
Department	*NF1KP933B – U ENGR ECE Solicitation Email Opt Out (Constituent Request)*
Program	*NC1KV625O – U LAS SLCL Modern Greek Studies Solicitation Phone Opt Out (Constituent Request)*

NM1KL384A U ACES 4H Solicitation Mail Opt Out. This is applied when the record doesn't want to receive solicitation mail from 4H in the College of Aces at UIUC.

Non-Solicitation Codes (Non-Solicitation Opt Out – NP, NE, NB, NG, NN Project Type)

Codes are added to records and used in the production of data files to exclude individuals from mass communications where the primary objective is to inform, question, or acknowledge, such as newsletters, birthday and holiday cards, or thank-you calls. The assigned project type is determined by the method of communication—NP (No Mail), NE (No Email), NB (No Phone Calls), NG (No Text Messages), and NN (No Geofencing).

Examples:

University system	*NP000 – UN ADMN Non-Solicitation Mail Opt Out (Constituent Request)*
University	*NP2D – C CAMP Non-Solicitation Mail Opt Out (Constituent Request)*
College	*NE1LCE – U VMED Non-Solicitation Email Opt Out (Constituent Request)*
Department	*NE4SB390E – S AUDTR Non-Solicitation Email Opt Out (Constituent Request)*
Program	NB1NA639O *– A UIAA Alumni Welcome Center Non-Solicitation Phone Opt Out (Constituent Request)*

NP1LRD U LIBR Non-Solicitation Mail Opt Out. This is applied when a constituent doesn't want to receive informational mail from the UIUC Library.

Invitation Codes (Invitation Opt Out – NB, NH, NI, NJ, NK Project Type)

Codes are added to records and used in the production of data files to exclude individuals from event mass communications. Invitations are a sub-objective of the non-solicitation objective. The assigned project type is determined by the method of communication— NB (No Phone Calls), NH (No Text Messages), NI (No Mail), NJ (No Email), and NK (No Geofencing).

Examples*:*

University system	*NJ000 – UN ADMN Invitation Email Opt Out (Constituent Request)*

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University	*NI1J – U CAMP Invitation Mail Opt Out (Constituent Request)*
College	*NJ4PKK – S LIBR Invitation Email Opt Out (Constituent Request)*
Department	*NI2FR702J – C CADA Art & Design Invitation Mail Opt Out (Constituent Request)*
Program	*NJ1KR495N1 – U FAA Music Band Invitation Email Opt Out (Constituent Request)*

NK2SA877Y S VCADV Invitation Geofencing Opt Out. This code is added when someone does not want to receive invitations to allow UIS to send push notifications to their phone when they are at UIS.

Survey Codes (Survey Opt Out – NQ, NS, NR, NT Project Type)

Surveys are also a sub-objective of the non-solicitation objective. Survey solicit codes are added to records and used in the production of data files to exclude individuals from survey mass communications. The assigned project type is determined by the method of communication—NQ (No Text Messages), NS (No Mail), NR (No Email), and NT (No Phone Calls).

Examples:

University system	*NS000 – UN ADMN Survey Mail Opt Out (Constituent Request)*
University	*NS2G – C CAMP Survey Mail Opt Out (Constituent Request)*
College	*NR1KMH – U BUSN Survey Email Opt Out (Constituent Request)*
Department	*NR2FR947H – C CADA Theatre & Music Survey Email Opt Out (Constituent Request)*
Program	NT1NA639O – *A UIAA Alumni Welcome Center Survey Phone Opt Out (Constituent Request)*

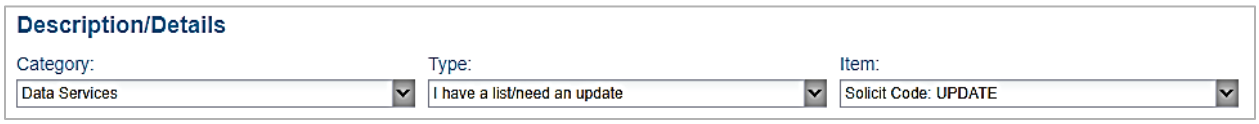
NQ000 UN ADMN Survey Text Opt Out. This is applied to individuals who do not want to receive surveys via text message from UI.

Accessing the Solicit Code Update Request Form

Log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.

Adding or Removing a Solicit Code

Only select campus representatives can directly add or remove solicit codes on constituent records in TED. All other users may request these changes by logging in to UIF Support using the link https://support.uif.uillinois.edu and choosing the options in the template below.



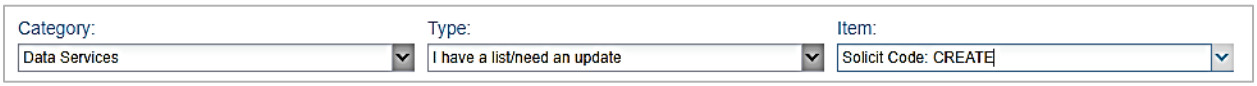
Please allow 5 business days for this Solicit code to be added to the constituent by your campus representative.

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Request New Solicit Code

Log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



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REMOVING A SPOUSE FROM MAILINGS

WHILE MAINTAINING THE HOUSEHOLD RECORD

Occasionally a constituent would like mail addressed to him/her only and have a spouse's name removed (they are not divorced, just have a specific mailing request). In this instance, the household should not be split as it would break the prospecting and household giving.

University Annual Giving Office contacts:

UIF TED Solicit Coding for UIC UIFTEDSolicitCodingUIC@uif.uillinois.edu

UIF TED Solicit Coding for UIS UIFTEDSolicitCodingUIS@uif.uillinois.edu

UIF TED Soliciting Code for UIUC UIFTEDSolicitCodingUIUC@uif.uillinois.edu

UIF TED Soliciting Code for UIF UIFTEDSolicitCodingUIF@uif.uillinois.edu

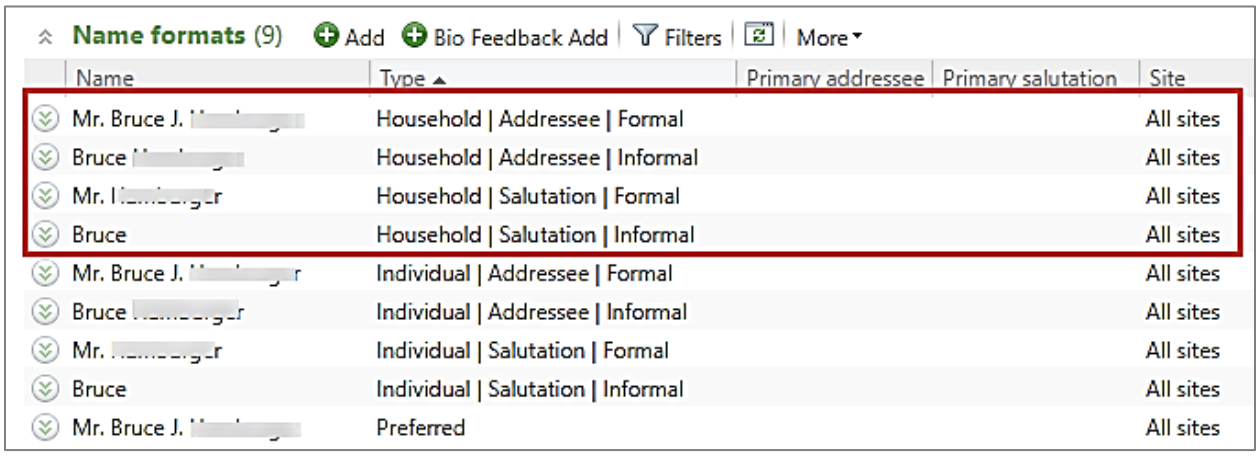
UIF TED Soliciting Code for UIAA UIFTEDSolicitCodingUIAA@uif.uillinois.edu

Note: If you do not know the reason for removing spouse, (i.e., divorced, or deceased) then follow instructions under bio feedback add comment on the comment tab on either record.

Process

Users should contact their University Annual Giving Office so the name formats can be updated. The following steps will need to take place:

1. Both spouse records will need to be updated so that each spouse in not listed. This way the "Addressee" and "Salutation" fields will not be included in the Marcom output files and would only have one spouse listed. (University Annual Giving offices)
2. In this example the household is still intact, but name formats have been modified on **each record** to reflect the name of constituent to receive mailings. (University Annual Giving offices)



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3. If one spouse is not to receive mailing, then the appropriate solicit code will need to be applied to that record. (University Annual Giving offices)
4. Add Note to display to all users with **Type**: Prospect Note, **Title**: Individual Households – Communication and **Notes**: Individual households requested for communication preference. (UIF AIMS)
5. Marketing effort data files – remove spouse name for constituents with applicable notes. (UIF AI Segmentation)

UPDATED 5/22/25

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CONTACT TAB

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CONTACT TAB

REACHING OUR CONSTITUENTS

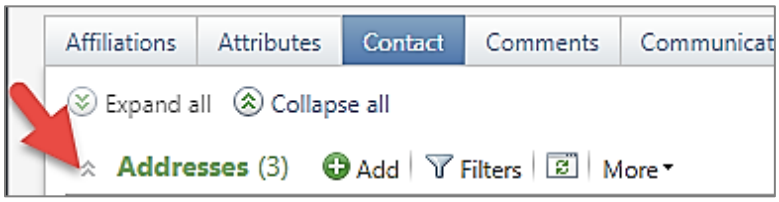
The Contact tab contains the following contact sections for a constituent:

- Addresses
- Phone numbers
- Email addresses
- Social Media

The edit option does not retain the historical view of previous information and should be used sparingly (i.e. to correct an address with a small typo - 123 Main **Dr**. to 123 Main **St**.).

General Information

Click the Expand all or Collapse all option to open or close all sections (address, phone, email, and social media)



To open one section at a time, click the chevron next to the section.

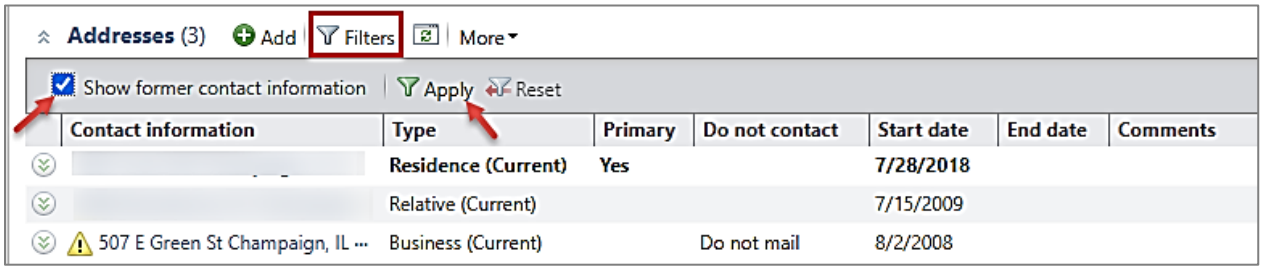
Filters in each section allow you to toggle between viewing current data, or current **and** former data.

Contact data appears on the Contact Information and Addresses summary tiles.



Addresses, phone numbers, and email addresses have start and end date fields and allow us to keep a historic record of previous data and when data is in effect. Records with end dates are considered “Former”, those with no end date are considered “Current”.

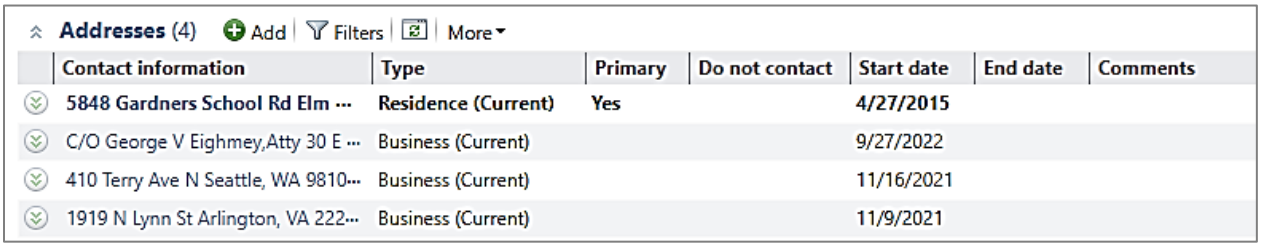
Choose the filter option in a section and check the box to Show former contact information or uncheck to hide former, then choose Apply. This filter setting will remain until you change it.



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Addresses



Current and former addresses for these types are stored in the Addresses section on the Contact tab:

Address Type	Definition
Business	Constituent's physical street business address
Business Mailing	Another business address where a constituent wants to receive mail - like a PO Box
Human Resources	This type would only be used on a business and signifies the Human Resources Department.
Partial Business	Only a partial business address is available (i.e. works somewhere in Louisiana but that's all we know)
Partial Resident	Only a partial home address is available (i.e. works somewhere in Louisiana but that's all we know)
Receipt Address	Only Gift Processing or Gift Admin should add this address type. It is added when the receipt address is different that the residence or business or when the actual address type is not known. NOTE - The actual receipt process looks at what address is marked as primary, so if there is a receipt address on the system but it is not marked primary then the receipt will not go there.
Relative	These entries come from Student and Grad loads and signify an address of a relative of the student/grad (typically the guardian listed in Banner).
Residence	Constituent's physical street home address
Residential Mailing	Another home address where a constituent wants to receive mail - like a PO Box

Primary

Each constituent record will have one address record indicated as primary. If the constituent has only one address record, it is the primary record. The primary address cannot be end dated until another address is designated as primary.

Do Not Contact

The Do Not Contact option can be used so a specific address is not used, or if no good address is available (since the end date can't be entered).

The Do Not Contact option should never be used In lieu of a solicit code if a constituent has requested no contact.

Start and End Dates

As new addresses are entered, a start date can be entered, and the end date should be populated on the previous address for historic reference.

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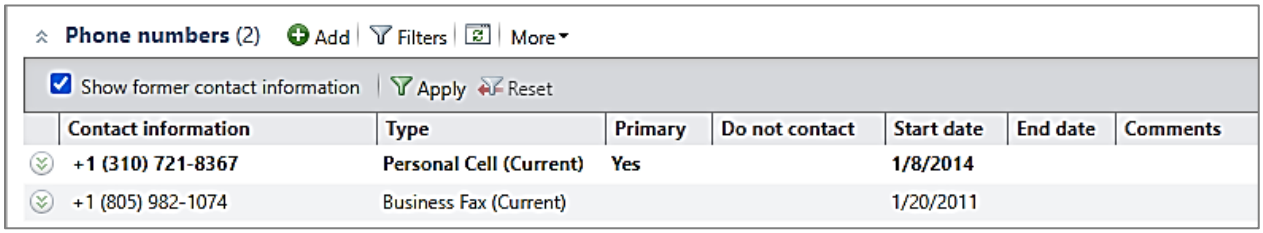
Comments

The Comments field is used for entering notes relative to the address section for the constituent record in TED.

Seasonal

There is a seasonal option that allows for designating an address for a specific date range each year – such as for a constituent who lives in Arizona for the winter.

Phone Numbers



Current and former phone numbers for these types are stored in the Phone Numbers section on the Contact tab:

Phone Type	Definition
Home	Constituent's home phone number
Personal Cell	Constituent's cell number
Home Fax	Constituent's home fax number
Business	Constituent's business phone number
Business Cell	Constituent's business cell number
Business Fax	Constituent's business fax number
Assistant	Phone number for the constituent's assistant
Relative	These entries come from Student and Grad loads and signify an address of a relative of the student/grad (typically the guardian listed in Banner).
Campus	UI Faculty/Staff campus related phone numbers

Primary

Each constituent record will have one phone number indicated as primary. If the constituent has only one phone number, it is the primary record. The primary phone number cannot be end dated until another phone number is designated as primary.

Do Not Contact

The Do Not Contact option can be used so a specific phone number is not used, or if no good phone number is available (since the end date can't be entered).

The Do Not Contact option should never be used In lieu of a solicit code if a constituent has requested no contact.

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Start and End Dates

As new phone numbers are entered, a start date can be entered and the end date should be populated on the previous phone number for historic reference.

Comments

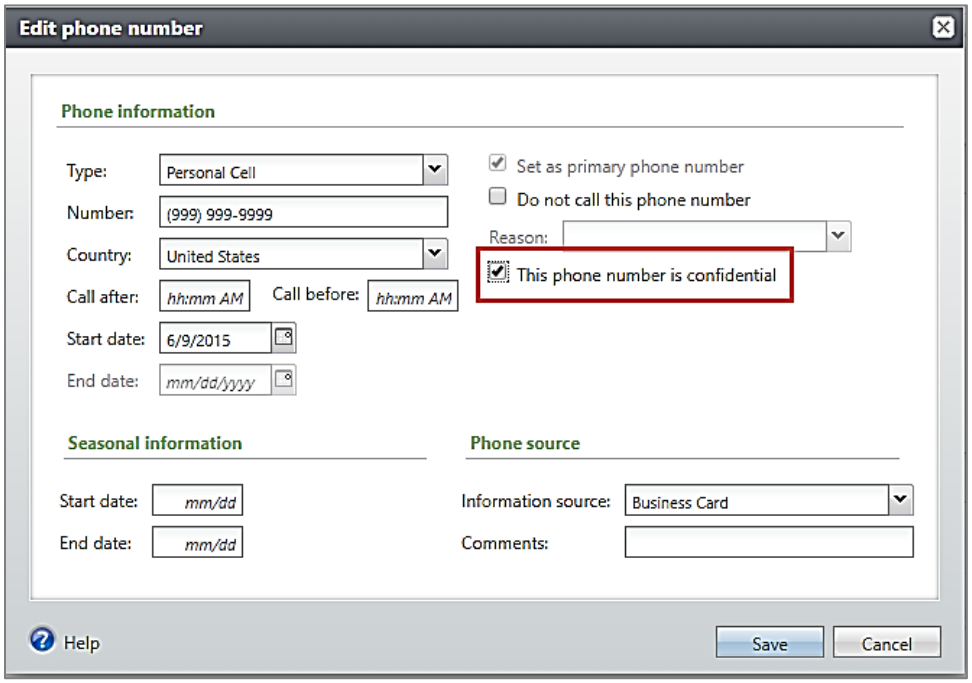
The Comments field is used for entering notes relative to the phone numbers section for the constituent record in TED.

Seasonal

There is a seasonal option that allows for designating a phone number for a specific date range each year – such as for a constituent who lives in Arizona for the winter and has a different home phone number there.

Confidential

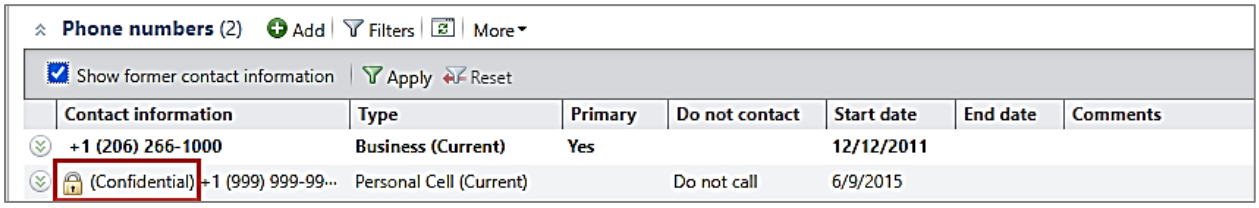
If a constituent requested that their phone number is not to be shared with others outside of our organization, there is a ***This phone number is confidential*** option.



When a phone number is marked as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the phone number on the Contact tab so users know not to share the information.

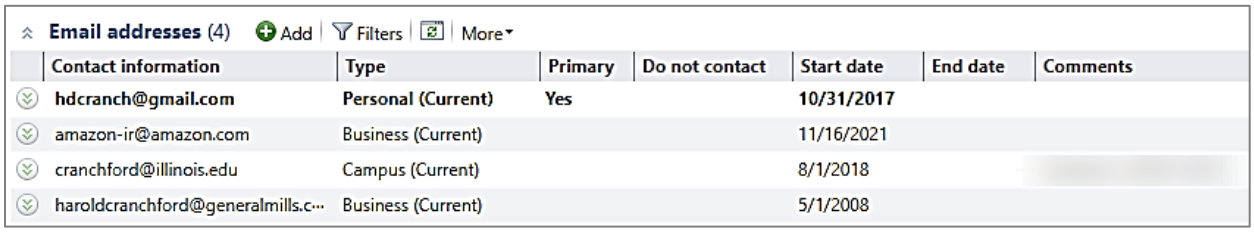
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Marking a phone number as confidential will not exclude the record and phone number from being pulled into a Telemarketing campaign (Vanilla Soft). An appropriate solicit code is needed to prevent them from being called.

Email Addresses



Current and former email addresses for these types are stored in the Email Addresses section on the Contact tab:

Email Address Type	Definition
Personal	Constituent's personal email
Business	Constituent's business email
Assistant	Email for the constituent's assistant
Campus	UI Faculty/Staff campus related email

Primary

Each constituent record will have one email address indicated as primary. If they constituent has only one email address, it is the primary record. The primary email address cannot be end dated until another email address is designated as primary.

Do Not Contact

The Do Not Contact option can be used so a specific email address is not used, or if no good email address is available (since the end date can't be entered).

The Do Not Contact option should never be used In lieu of a solicit code if a constituent has requested no contact.

Start and End Dates

As new email addresses are entered, a start date can be entered, and the end date should be populated on the previous email address for historic reference.

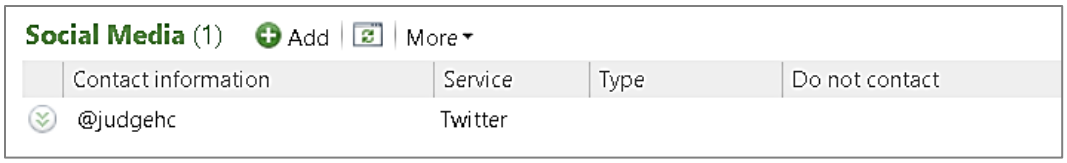
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Comments

The Comments field is used for entering notes relative to the email addresses section for the constituent record in TED.

Social Media



Social media information for these types can be stored in the Social Media section on the Contact tab:

- Facebook
- Flickr
- Google+
- Instagram
- LinkedIn
- Myspace
- Snapchat
- Twitter
- WeChat

There are no dates associated with the Social Media entries and no primary indicator.

Additional Documentation

Users may find the following related documentation helpful:

- Add & Update Address Information
- Add & Update Phone Information
- Add & Update Email Address Information
- Add & Update Social Media Information
- Understanding Start and End Dates
- Understanding Do Not Contact
- Updates and History Tabs

UPDATED 8/1/24

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ADD & UPDATE ADDRESS INFORMATION

COMMUNICATING WITH THE CONSTITUENT THROUGH MAIL

Addresses in TED are a method used to contact a constituent via mail. Several different address types are stored on a constituent record. Types include residential, campus, or business addresses.

Address information is intended to be used for the purpose of contacting the constituent either through personal correspondence or mass communications. The primary address on a record is pulled for any mass communication lists, ad hoc list requests, segmentation, or personal correspondence. For this purpose, it is important to note if an address is used by the constituent year-round or on a seasonal basis. This will help ensure that communications are received correctly by the constituent at the address of their choice.

It is important to note that constituents can request to not be contacted by the university, college, or unit at a specific or any address. These requests are indicated on the record by a Do not mail flag or a solicit code.
A Do Not Mail flag is added to indicate that a constituent does not want a specific address used and will appear on the TED record in the form of an exclamation mark symbol. An address can be marked Do Not Mail for a variety of reasons.
A Solicit Code is added to indicate that a constituent does not want to receive mass communications and applies to all current and future addresses on the record.

Address types and locations

Residential, residential mailing, partial residence, and relative addresses are linked to an individual constituent and found on the individual constituent's record.

Business, business mailing, partial business, and human resources addresses are linked to an organization and found on the organization constituent record.

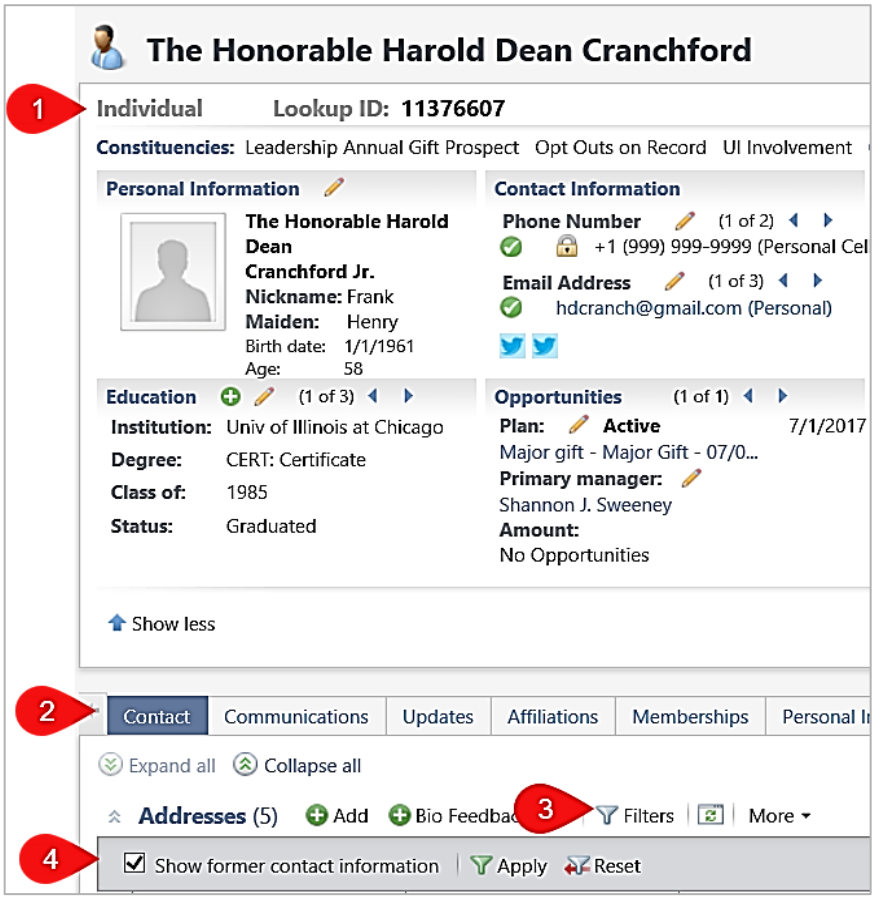
Note: The business address associated with a constituent's place of employment will be added to the individual record when the employment relationship is created between the constituent and the organization. It should not be added directly to the individual constituent's record via the Contact Tab.

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Viewing Address Information on the Record

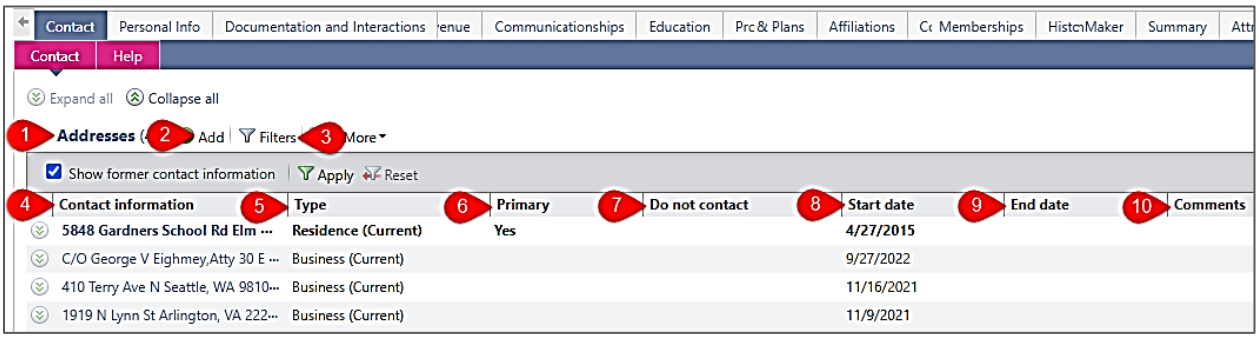
The Contact tab on an individual constituent's record contains the constituent's address information.



1. Begin by navigating to the constituent's individual record in TED.
2. Select the **Contact** tab. To view all the addresses on the record, you may need to set your filter so you can see former contact information.
3. Click **Filters**.
4. Click **Show Former Contact** Information and then **Apply**.

Addresses that have been End Dated indicate that the constituent is no longer using that specific address. It is important to review the former contact information prior to adding a new address to the record. It is unnecessary to add an address that is already on the record but contains an end date. If it was end dated by accident, the end date can be removed, so the address is active again.

Contact Tab Details



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1. The Contact tab has multiple sections. In this document, we are focusing on the **Addresses Section**. The section header indicates both which section and how many pieces of contact information are available in that section. *Note this number will change as filter settings are applied and removed.
2. The **Add** option allows the user to directly add a new address to the TED record. Most users have access to add new contact information.
3. Selecting the **Filters** option will expand the section header information and allow the user to select Show former contact information and Apply. This option allows the user to see any address that has been end dated.
4. The **Contact information** column in the Address section displays the constituent address.
5. The **Type** column in the Addresses section displays the type of address associated with the contact information.
6. The **Primary** column in the Addresses section indicates if the address has been marked as the Primary for the constituent. The Primary address is the address pulled in all mass communication requests.
7. The **Do Not Contact** column in the Addresses section indicates if the address has been marked **Do Not Mail**. A Do Not Mail flag is added to the address when that specific address should not be used. An address can be marked Do Not Mail for a variety of reasons.
8. The **Start date** column in the Addresses section identifies when the constituent began using that specific address.
9. The **End date** column in the Addresses section identifies when the constituent stopped using that specific address.
10. The **Comments** column in the Addresses section displays all comments made in connection with the address for a constituent record.

Adding a New Residential Address to a Record

After reviewing a constituent's Contact Tab and former contact information it may be necessary to add a new address to the record.

Understanding the options available when adding a new address to a record is important in ensuring that the address is added correctly.

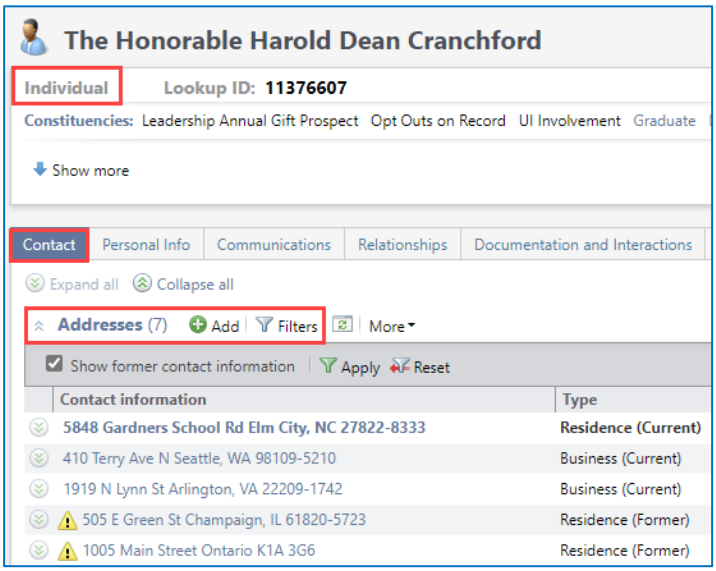
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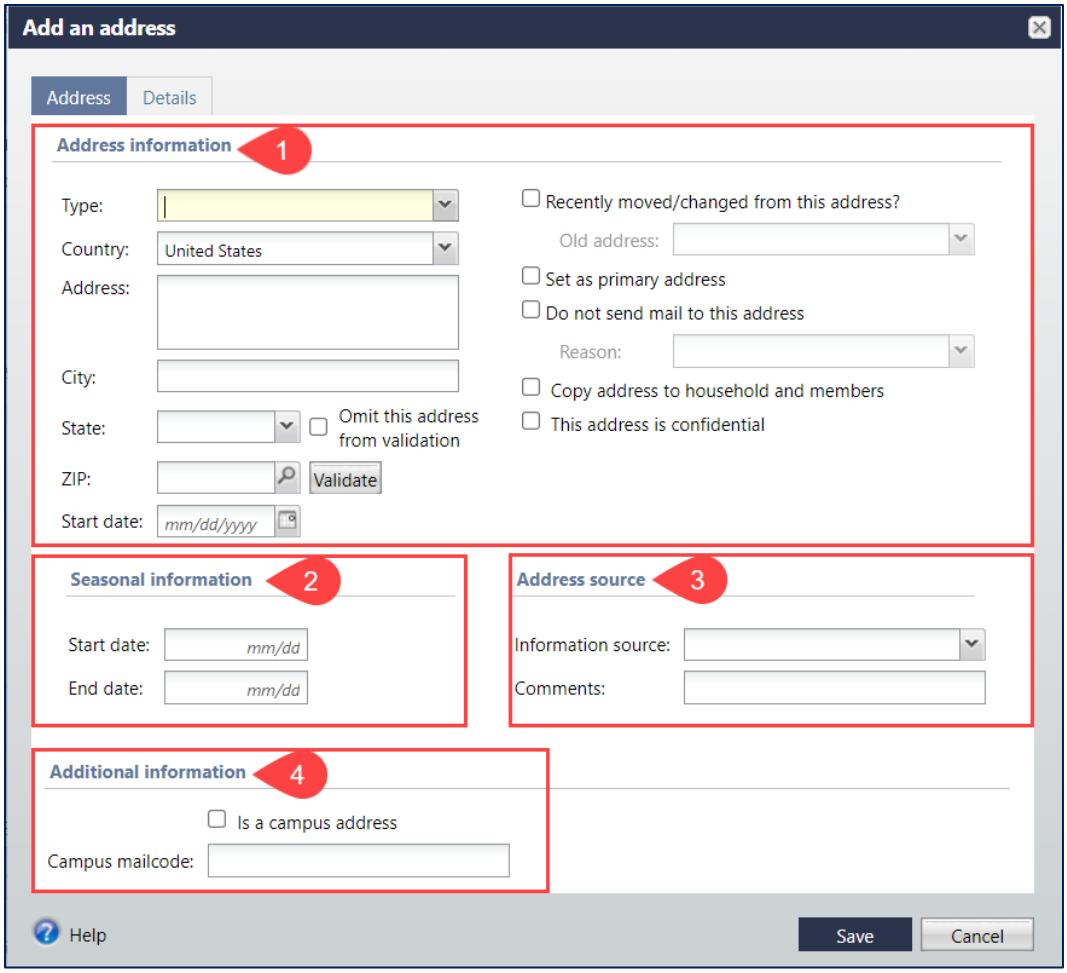
To begin, navigate to the Address section within the Contact Tab on the Individual constituent record.

Use the filter to verify the Address is not already on the record, then click the **Add** button.

***Note:** If the Add option is unavailable, submit a Bio Feedback comment via the Comments Tab on the record.



The form for adding an address is made up of 4 main parts.



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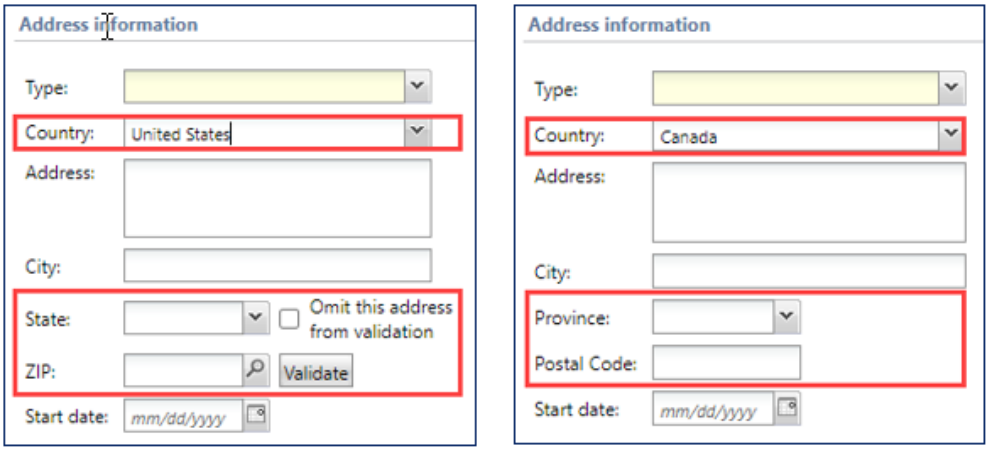
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1. **Address information**

Type: Select the Type from the drop-down menu:

- **Residence** – Constituent's physical street home address.
- **Business** – Constituent's physical street business address. **Note business addresses are not directly added to the constituent record via the Contact Tab. Business addresses are automatically added when a business relationship is created. For more information see the Individual–to-Organization Relationships documentation.
- **Residential Mailing** – Another home address where a constituent wants to receive mail - like a PO Box.
- **Business Mailing** – Another business address where a constituent wants to receive mail - like a PO Box.
- **Partial business** – Only a partial business address is available (i.e., works somewhere in Louisiana but that's all we know)
- **Receipt Address** – This address type is not currently being used.
- **Relative** – These entries come from Student and Grad loads and signify an address of a relative of the student/grad (typically the guardian listed in Banner).
- **Human Resources** – This type would only be used on a business and signifies the Human Resources Department.
- **Partial Resident** - Only a partial home address is available (i.e., lives somewhere in Louisiana but that's all we know).

Country: Select the Country from the drop-down menu. The country you select determines what other fields appear on the address. For instance, if you select Canada, State and Zip are replaced by **Province** and **Postal Code,** and the option to **Omit this Address from Validation** is removed.

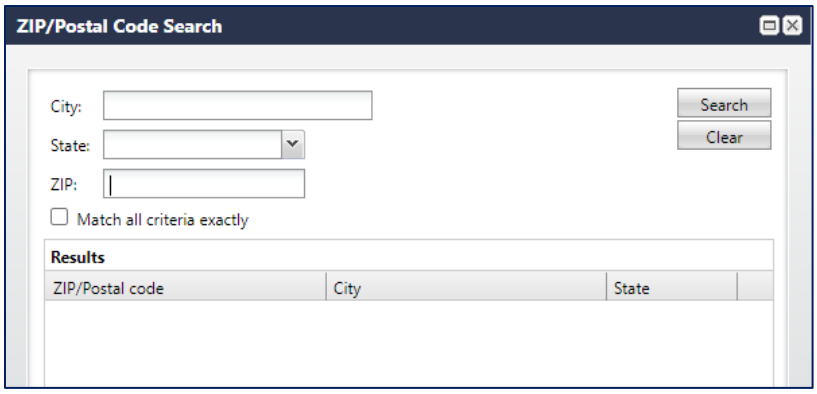


Address: Add the address details, including the street and apartment number if applicable.

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City, State, Zip, and Zip/Postal Code Search: Enter the City and State, or the Zip code and then click the Zip search button. If there is only one City for a Zip code, the City, State, and Zip fields will automatically be populated on the add form. If a City has more than one Zip Code, an additional search window will appear.



The Zip/Postal Code Search will allow you to search by City, State, or Zip to find the correct corresponding info. Select the one you need, and it will add it to the address add/update window. This data comes from https://www.unitedstateszipcodes.org/.

Omit this address from validation: If you check the **Omit this Address from Validation** box, this address will not be validated against United States Postal standards. If you do not validate an address, mailings to this address may be returned if formatted incorrectly.

Validate: Click **Validate** to verify the address format against the United States Postal Code. If the address does not exist, an address validation window will appear where you can search for the correct address. Select the correct address and click validate to go back to the Add screen. Even if you do not manually validate an address, addresses are validated on a regular basis, unless they are marked to be omitted from validation.

Start date: Add a start date for when the address became valid for the constituent. If the date is unknown, today's date should be added.

Recently moved/changed from this address: Check this box if this address is replacing another existing address and select the former address in the drop-down menu. This will automatically add an end date to the previous address.

Set as primary address: Checking this box will make this the primary address on the record. A record can only have one primary address, which will be listed first on the record.

Do not send mail to this address: If this address should not be used, check the **Do not send mail to this address** box and then select the **Reason** listed below from the drop-down menu. Some call this the **Do Not Mail** flag.

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- **Campus Address** – Campus Addresses should not receive promotional or solicitation materials.
- **Constituent Request** – A constituent may request to not receive communications at a specific address for a variety of reasons. The address is still valid but should not be used.
- **Former** – Select this when the address is no longer in use, and it is the primary address. All contact types are required to have a primary address and if there are no other addresses for the constituent, the primary address cannot be end dated.
- **Incomplete Address** – Select this reason when the address type is **Partial Business** or **Partial Resident.** This further indicates that the address is incomplete in some way.
- **Internal Request** – An address can be marked **Do Not Mail** by someone from the unit, foundation, or a gift officer.
- **Unknown** – If the communication was returned with no additional information, mark the address with a **Do Not Mail** flag with the reason **Unknown**.

*** Addresses that should not be used are added to TED with the Do Not Mail flag so that someone else who may not know that it should not be used doesn't add it without the flag.****

**** The Do Not Mail flag should not be used to indicate that a constituent does not want to receive mass communications. A Solicit Code is added instead of a Do Not mail flag in this instance because a Do Not Mail flag only applies to one specific address. A solicit code applies to all current and future addresses on the record.**

******The proper method to add a Solicit code is by logging in to UIF Support using the link https://support.uif.uillinois.edu and* submitting a UIF Support Advancement Services Ticket, selecting 'Data Services', 'I have a list/need an update', and 'Solicit Code: UPDATE' in the ticket drop down fields below.**



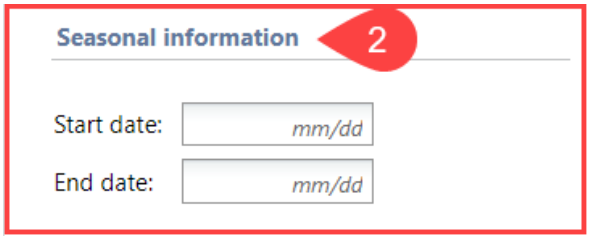
Copy address to household and members: Check this box if you want to copy the address to the spouse/life partner record as well.

This address is confidential: This box is used to mark an address as confidential. While all information in TED is confidential, this flag provides an additional notice to TED users that this address is sensitive. A lock icon and the word Confidential will display with the address.

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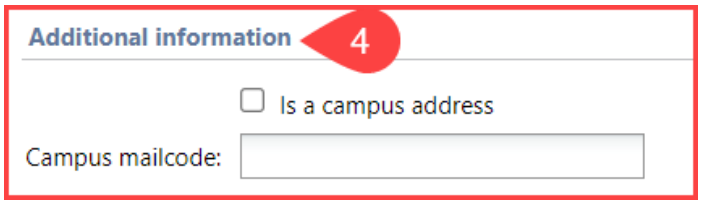
2. **Seasonal Information**
   If this address should only be used for certain months of the year, fill in the **Start date** and **End Date** as appropriate. Make sure that you add seasonal dates to the secondary address where the constituent should receive mail for the rest of the year.





3. **Address source**
   Select the **Information Source** of where you found this address information from the drop-down menu. Fill in any additional **Comments**. Comments should include additional details on the address that is not covered in any other area of the Add form.

4. **Additional Information**
   Check the **Is a campus address** box if the address is a University of Illinois campus address and fill in the **Campus mailcode.**



Note: The campus mail code cannot be edited once it has been entered. If there is an error with the campus address, a new address must be added.

Click **Save** to save the address.

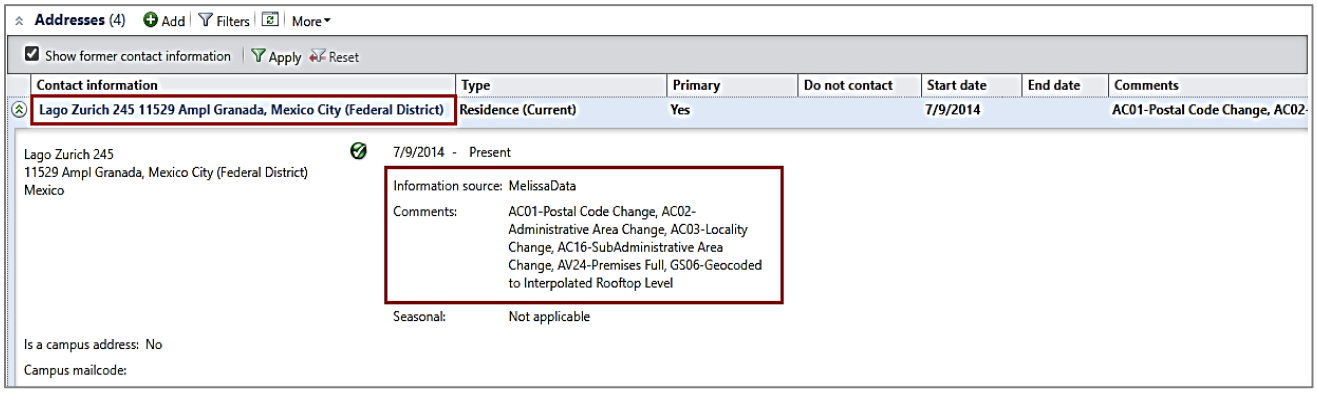
International Addresses

International addresses are validated in TED via data from Melissa Inc's International Address Verification service. The verification process adds components such as postal codes, locality, and other missing address data for addresses that can be verified.

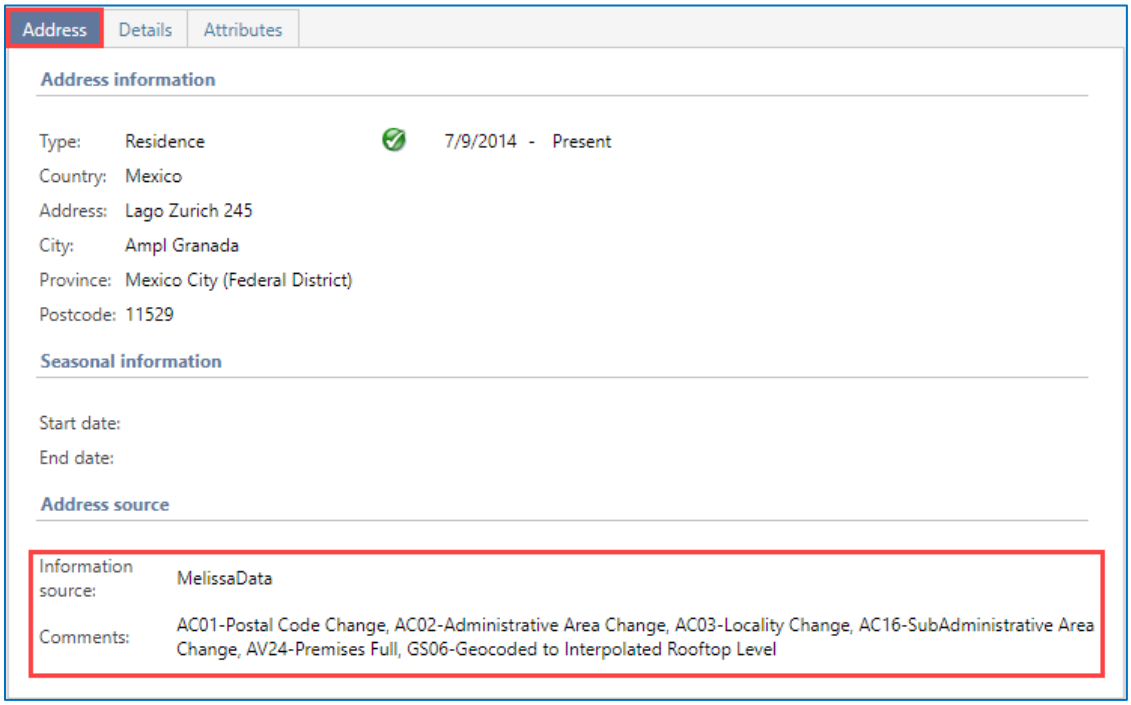
Clicking on the double arrows next to the address displays the information source and the comments. The comments include the return codes that explain what was corrected or what might be incorrect about the address.

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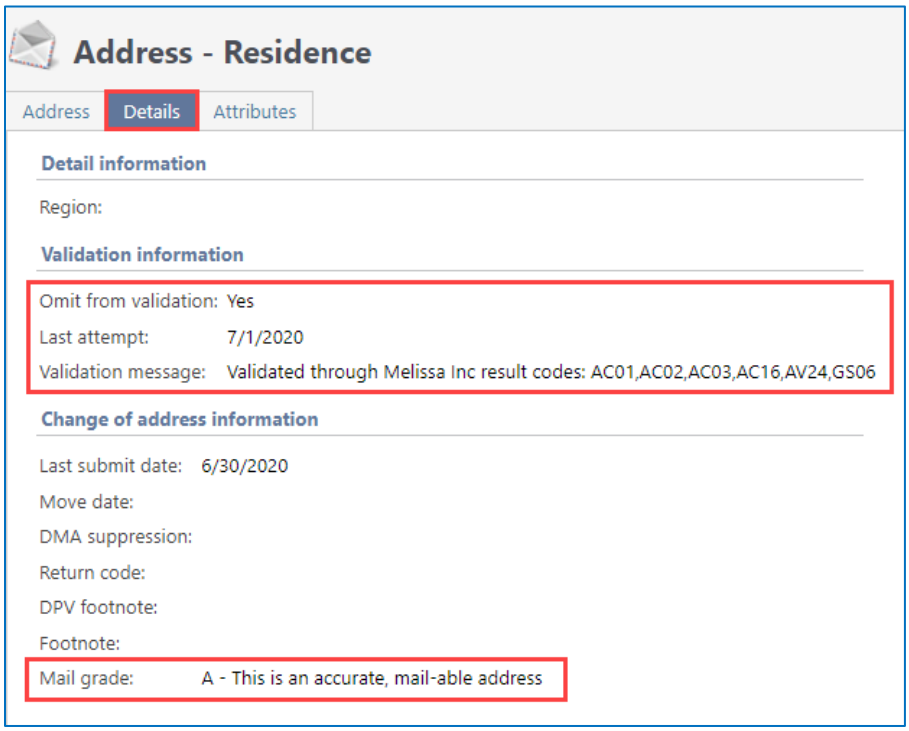
Clicking on the address itself will open a new window where you can view additional details.



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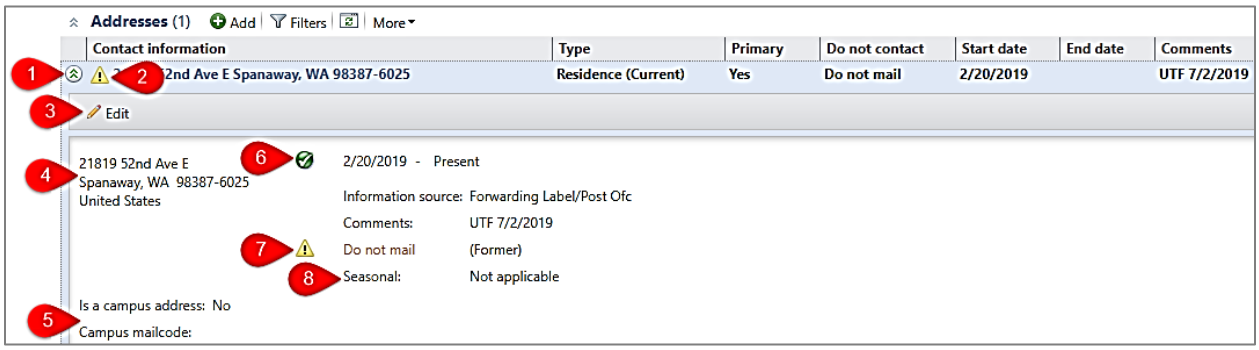
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The validation message on the Details tab within the address will provide the return codes and the Mail Grade field will detail if the address is deliverable.



Expanded Address Details

Expanding an address on the record will display additional details not shown while the address is collapsed.



1. The **double arrows** to the left of the address will expand the contact area to show additional details.
2. The **exclamation symbol** identifies that there is a Do Not Mail flag on the address.
3. When the address has been expanded the **Edit** option becomes available.
4. The expanded area shows the exact way the address has been formatted.

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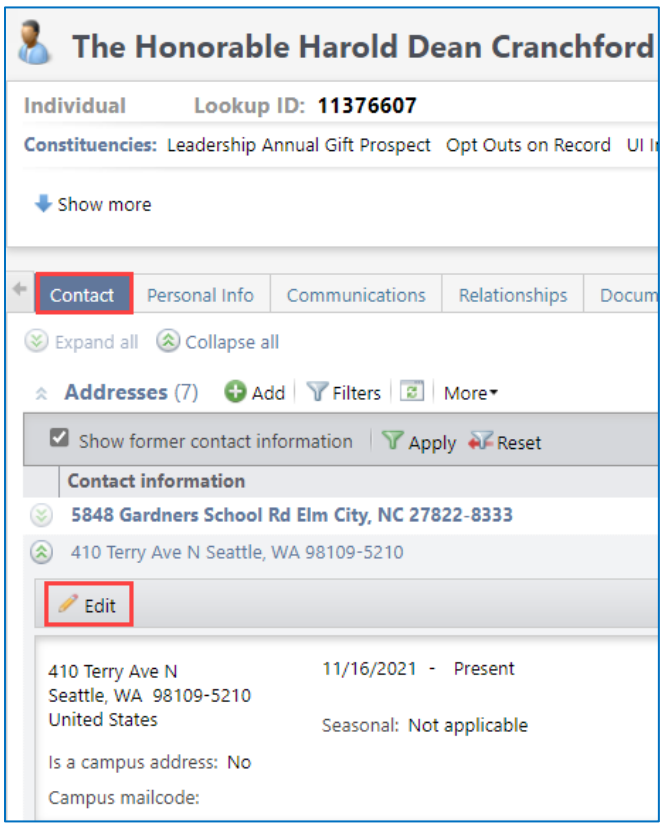
5. This area will identify additional details on any campus information including the campus mail code.
6. This area indicates the dates the address is or was valid.
7. If there is a **Do not mail** flag on the address, the reason will appear next to the exclamation mark symbol.
8. The **Seasonal** area will identify any seasonal dates on the address. **Note: Seasonal dates should never be 1/1 – 12/31.**

Editing an Address on a Record

Addresses should only be edited if they are no longer valid, if they contain an error, to update seasonal information, or to mark them as primary as appropriate. If someone moves to a new address, add a new address instead of editing another address. This allows us to keep the historical record of the constituent's old addresses, so the addresses are not entered again in error.

Navigate to a Constituent record.

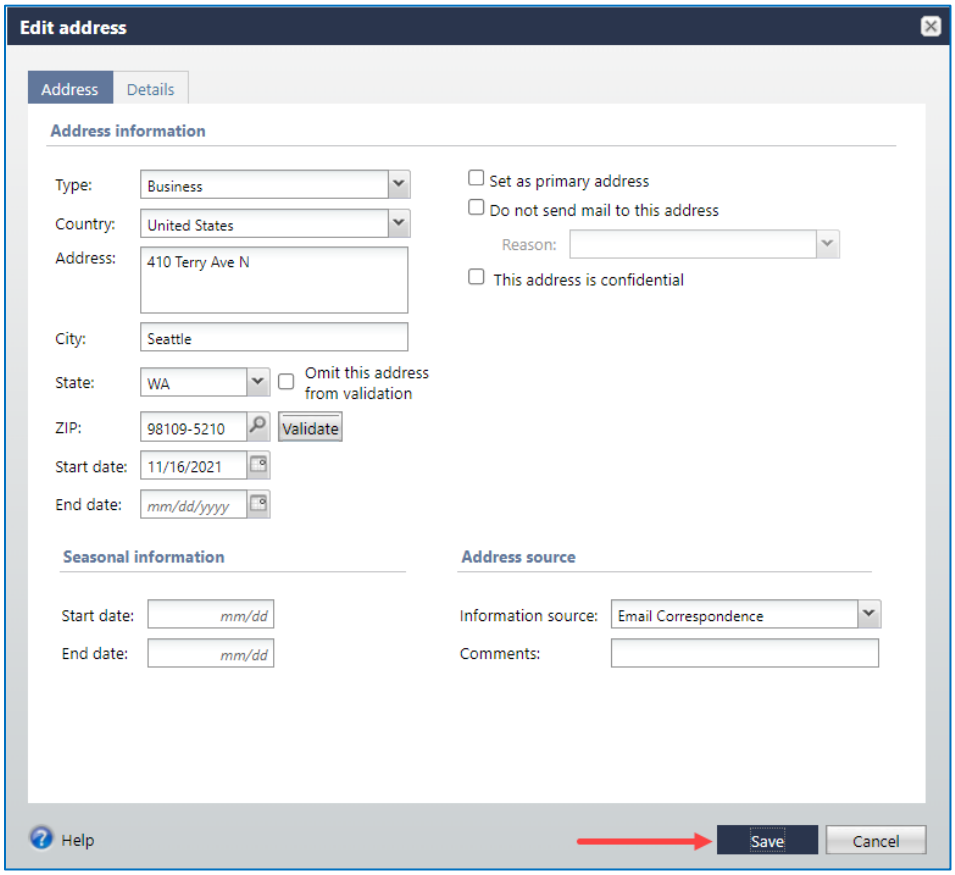
1. Click the **Contact** tab.
2. Click the **double arrows** to the left of the address you want to edit.
3. Click **Edit**.



4. Update fields as needed (not to be used for new addresses)

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5. Click **Save**.



Marking an Address Unknown

If you receive returned mail, attempt to find an updated address for the constituent. If you cannot locate a new address, but there is another valid address on the record, take the following steps:

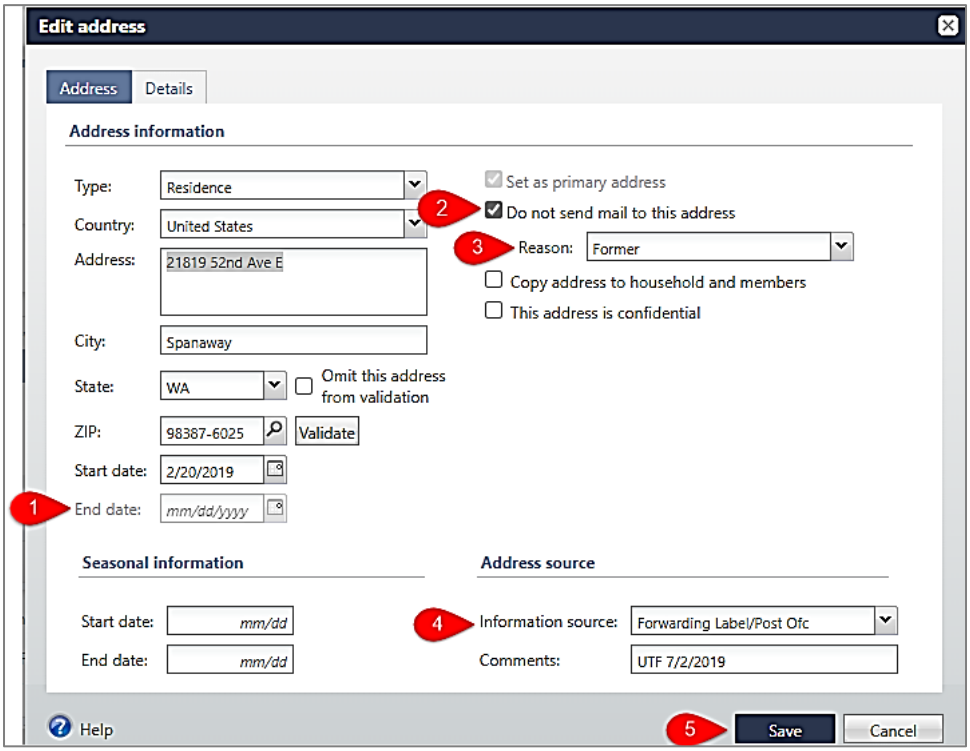
Mark the valid address as Primary by following the Editing an Address steps above and checking the **Set as primary address** box.

On the bad address, follow the Editing an Address steps below.

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1. Add an **End Date** when possible.
2. Check the **Do not send mail to this address** box.
3. Select a **Reason** from the Reason drop-down menu. For additional information on which reason code to choose, see the document **Understanding Do Not Contact**.
4. Update the **Information source**.
5. Click **Save**.



NOTE: If there are no other valid addresses on the record, you will not be able to add an End date. This is because there must always be one address designated as **Primary**. In this case, only update the **Do not send mail to this address** box, the **Reason**, and the **Information Source**. When a new address is found, that can be added and marked as **Primary** and then the former address can be **End dated**.

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ADD & UPDATE PHONE INFORMATION

COMMUNICATING WITH THE CONSTITUENT BY PHONE

Phone numbers in TED are a method used to contact a constituent via phone. Several different phone number types are stored on a constituent record. Types include home or personal cell, campus, or business phone numbers.

Phone number information is intended to be used for the purpose of contacting the constituent either through personal phone calls, or mass communications through the call center. The primary phone number on a record is pulled for any mass communication lists, ad hoc list requests, segmentation, or for any personal correspondence. For this purpose, it is important to note if a phone number is used by the constituent year-round or on a seasonal basis. This will help ensure that communications are received correctly by the constituent at the number of his or her choice.

It is important to note that constituents can request to not be contacted by the university, college, or unit at a specific or any address. These requests are indicated on the record by a Do not mail flag or a solicit code.
A Do Not Call flag is added to indicate that a constituent does not want a specific phone number called and will appear on their TED record in the form of an exclamation symbol. A phone number can be marked Do Not Call for a variety of reasons.
A Solicit Code is added to indicate that a constituent does not want to receive mass communications and applies to all phone numbers, current and future on the record.

Phone Number types and locations

Home, personal cell, home fax, relative, assistant, and campus phone numbers are linked to an individual constituent and found on the individual constituent's record.

Business, business cell, and business fax phone numbers are linked to an organization and found on the organization constituent record.

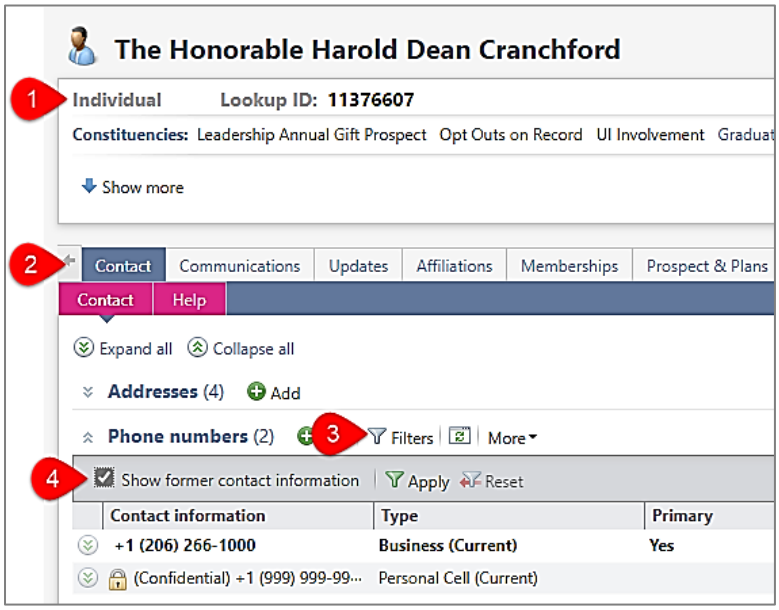
Note: Most business phone numbers associated with a constituent's place of employment will be added to the individual record when the employment relationship is created between the constituent and the organization. It should not be added directly to the individual constituent's record via the Contact Tab. Exceptions can include the assistant, business cell, or business fax numbers.

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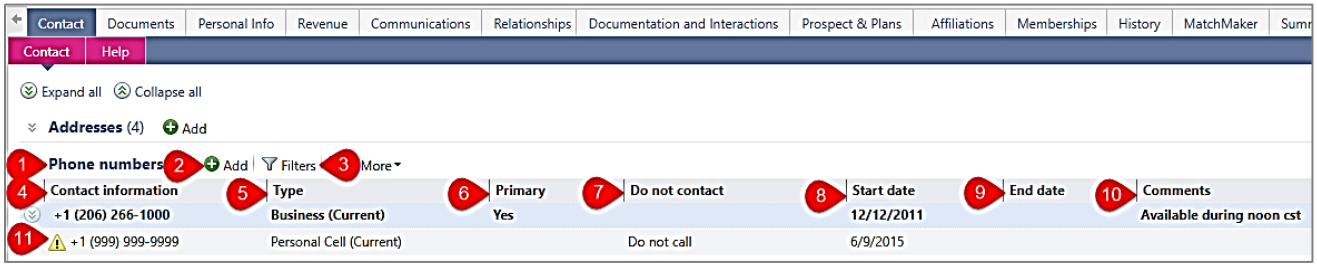
Viewing Phone Number Information on the Record

5. Begin by navigating to the constituent's **Individual** record in TED.
6. Click the **Contact** tab.
7. To view all phone numbers on the record, you may need to set your filter so you can see former contact information. Click **Filters**.
8. Click **Show Former Contact** Information and click Apply.



Phone numbers that have been End Dated indicate that the constituent is no longer using that specific phone number. It is important to review the former contact information prior to adding a new phone number to the record. It is unnecessary to add a phone number that is already on the record but contains an end date. If it was end dated by accident, the end date can be removed, so the phone number is active again.

Contact Tab Details



11. The Contact tab has multiple sections. In this document, we are focusing on the **Phone Numbers**. The section header indicates both which section and how many pieces of contact information are available in that section. *Note this number will change as filter settings are applied and removed.
12. Use the **Add** option to directly add a new phone number to the TED record.
13. Selecting the **Filters** option will expand the section header information and allow the user to select Show former contact information and Apply. This option allows the user to see any phone number that has been end dated.

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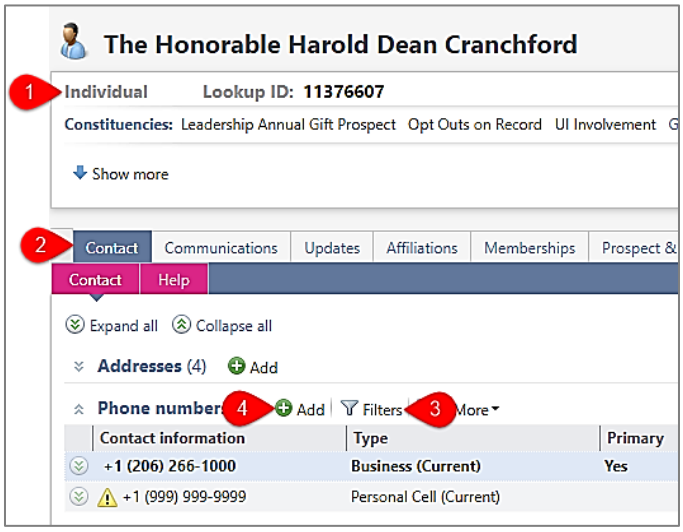
14. The **Contact information** column in the Phone Numbers section displays the constituent Phone number. All phone numbers should contain the appropriate area code.
15. The **Type** column in the Phone Numbers section displays the type of number associated with the contact information.
16. The **Primary** column in the Phone Numbers section indicates if the number has been marked Primary for the constituent. The Primary phone number is the number pulled in all mass communication requests.
17. The **Do Not Contact** column in the Phone Numbers section indicates if the number has been marked Do Not Call. A Do Not Call flag is added to the number when that specific number should not be used. A phone number can be marked Do Not Call for a variety of reasons.
18. The **Start date** column in the Phone Number section identifies when the constituent began using that specific number.
19. The **End date** column in the Phone Number section identifies when the constituent stopped using that specific number.
20. The **Comments** column in the Phone number section displays all comments made in connection with the phone number for a constituent record.
21. The exclamation point indicates there is a **Do Not Call flag** on the phone number.

Adding a New Phone Number to a Record

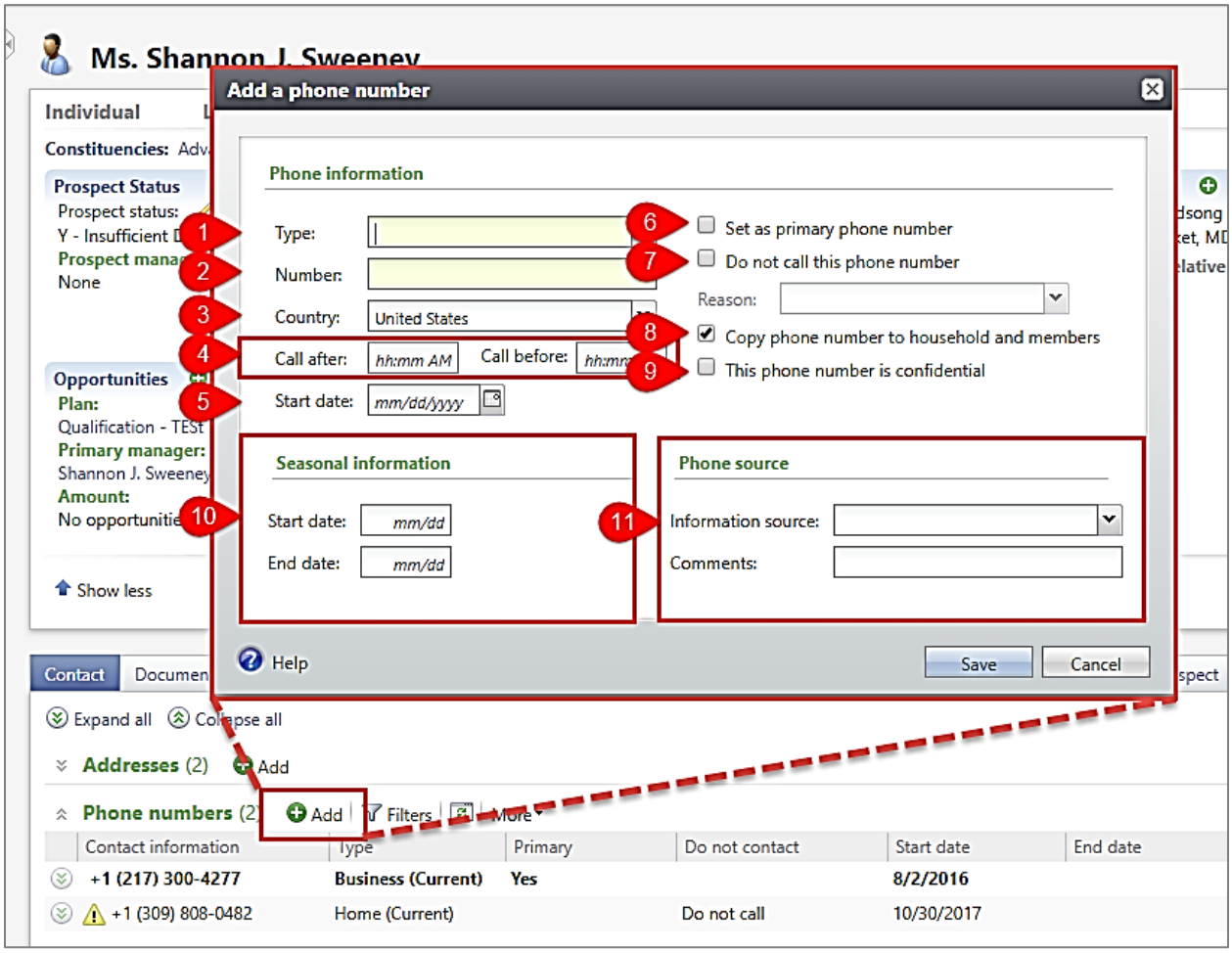
After reviewing a constituent's Contact Tab and former contact information it may be necessary to add a new phone number to the record.

Understanding the options available when adding a new phone number to a record is important in ensuring that the number has been added correctly.

1. Begin by navigating to the constituent's **Individual** constituent record in TED. All phone number information used for mass callings is pulled from Individual records, not Household records.
2. Select the **Contact** tab.
3. Use the Filter option to verify that the phone number is not already on the record.
4. Click the **Add** button.



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1. Select the **Type** from the drop-down menu:
    - **Home** – The phone number to the constituent's residence.
    - **Personal Cell** – The constituent's personal cell phone number.
    - **Home Fax** – The constituent's personal fax number.
    - **Business** – The number to the constituent's direct line at his/her place of business. **Note primary business phone numbers should not be directly added to the constituent record via the Contact Tab. Primary business phone numbers are added and edited when creating the contact relationship with the business. For more information see the Individual-To-Organization Relationship documentation. This does not include the constituent's assistant, business cell or business fax numbers. **
    - **Business Cell** – The number to the constituent's business cell phone. Note: Business cell phones can be added or updated directly on the individual constituent's record.
    - **Business Fax** - The number to the constituent's business Fax machine. Note: Business fax numbers can be added or updated directly on the individual constituent's record.

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- **Assistant** – The constituent may prefer his/her assistant to be contacted instead of the constituent directly.
- **Relative** – The constituent may choose to receive communications at a relative's residence.
- **Campus** – Any phone number associated with the campus.

2. Enter the **Number**. When entering the phone number "-"or "/" or even "(" ")" are unnecessary. The system will automatically format the number correctly.
3. Enter the **Country**. Note: The system will not automatically add or identify any international phone codes. They must be added when adding the phone number to the record.
4. If the constituent has requested to only be called during certain hours, add the **Call after** and the **Call before** times as necessary (including AM or PM.) Note: If the constituent has requested to only be contacted during specific hours be sure to add the constituent's time zone to the Comments field.
5. The **Start date** indicates when the constituent began using that phone number.
6. Check the box next to **Set as primary phone number** to make this the Primary phone number on the record. A record can only have one primary number, which will be listed first on the record.
7. If this phone number should not be used, check the **Do not call** this phone number box and then select the **Reason** from the drop-down menu:
    - Constituent Request – The constituent may request that a valid phone number not be used to contact them for a variety of reasons.
    - Former – All contact types are required to have a Primary. When the phone number is no longer in use, but there is no other phone number for the constituent available, the phone number cannot be end dated. It must be marked Do Not Call with the Former reason code.
    - Internal Request – A phone number can be marked Do not contact by someone from the unit, foundation, or a gift officer.
    - Restricted

***** The reason to add a phone number and mark it as Do Not Call is to indicate to others that may find the number and add it to TED see that even though it is a valid number, it should not be used. *****

***** The Do Not Call flag should not be used if a constituent does not want to receive mass communications. Even if you mark a number as Do Not Call, the constituent can still receive mass communications through any numbers added in the future. A Solicit code will apply to all phone numbers, current, and future. *****

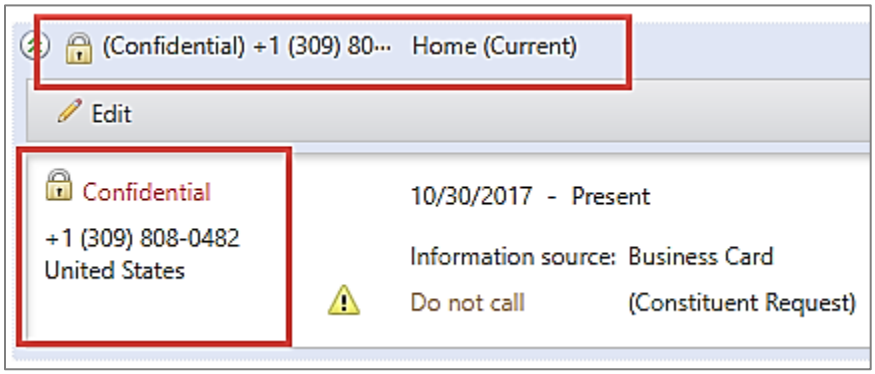
******The proper method to add a Solicit code is by logging in to UIF Support using the link https://support.uif.uillinois.edu and* submitting a UIF Support Advancement Services Ticket, selecting 'Data Services', 'I have a list/need an update', and 'Solicit Code: UPDATE' in the ticket drop down fields below.**

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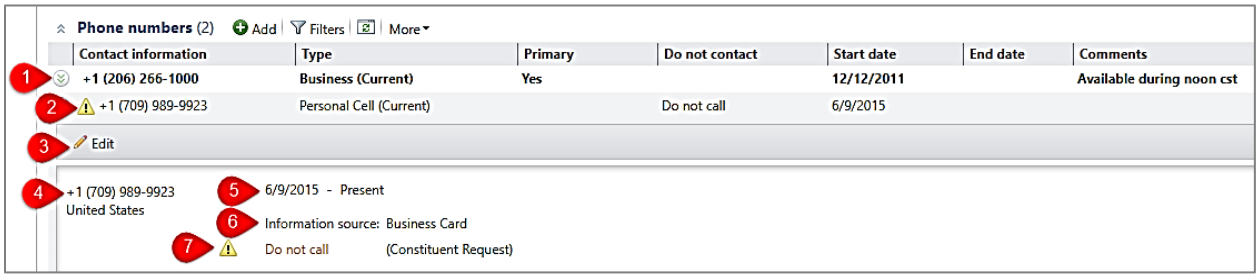
8. Check the **Copy phone number to household and members** box if you want to copy this number to those records. Only use this option for a business number if both members have a relationship with that business.
9. Check the **This phone number is confidential** box to mark a number as confidential. While all of the information in TED is confidential, this flag provides an additional notice to TED users that this phone number is sensitive. A lock icon and the word Confidential will display with the number.



10. If the number should only be used for certain months of the year, fill in the **Start date** and **End Date** under **Seasonal information** as appropriate. Make sure that you add seasonal dates to the number where the constituent should receive calls for the rest of the year.
11. Select the **Information Source** of where you found this phone number from the drop-down menu. Fill in any additional information in the **Comments** section.

Note: Each month, a list of phone numbers will be sent to RealPhoneValidation, a vendor we use to identify if phone numbers are cellular lines, landlines, or are no longer active. The information we get back will be used to keep phone types accurate in TED.

Expanded Phone Number Details



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9. The **double arrows** to the left of the phone number will expand the contact area to show additional details.
10. The **exclamation** identifies that there is a Do Not Call flag on the phone number.
11. When the phone number has been expanded the **Edit** option becomes available.
12. The expanded area shows the exact way the formatted phone number and associated country.
13. This area indicates the **dates** the phone number is or was valid.
14. Expanding the phone details will expand the **Information Source**, or how the information was received.
15. If there is a **Do Not Call flag** on the number, the reason will show in the expanded area.

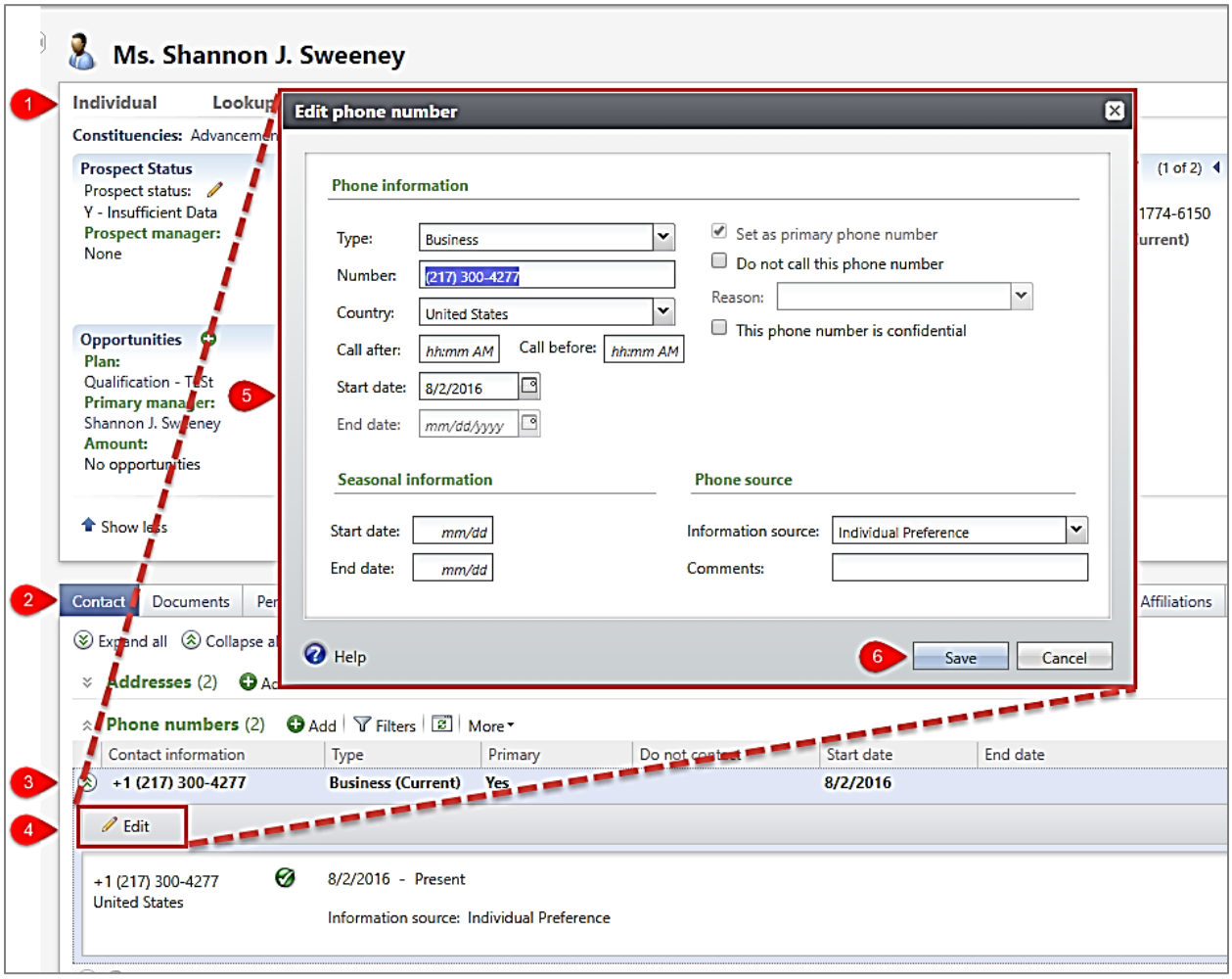
NOTE: This area will also identify any seasonal dates on the phone number. Seasonal dates should never be 1/1 – 12/31.

Editing a Phone Number on a Record

Phone numbers should only be edited if they are no longer valid, if there is an error with them, to update seasonal information, or to mark them as primary as appropriate. If a constituent changes phone numbers add a new phone number instead of editing one already on the record. This allows us to keep the historical record of the constituent's old phone numbers so the numbers are not entered again in error.

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1. Navigate to a Constituent record.
2. Click the **Contact** tab.
3. Click the double chevron to the left of the phone number you want to edit.
4. Click **Edit**.
5. Update all fields as needed.
6. Click **Save**.

Marking a Phone Number Unknown

If you are told someone is no longer at a phone number or a phone number is no longer connecting, attempt to find an updated number for the constituent. If you cannot locate a new phone number, but there is another valid number on the record, take the following steps:

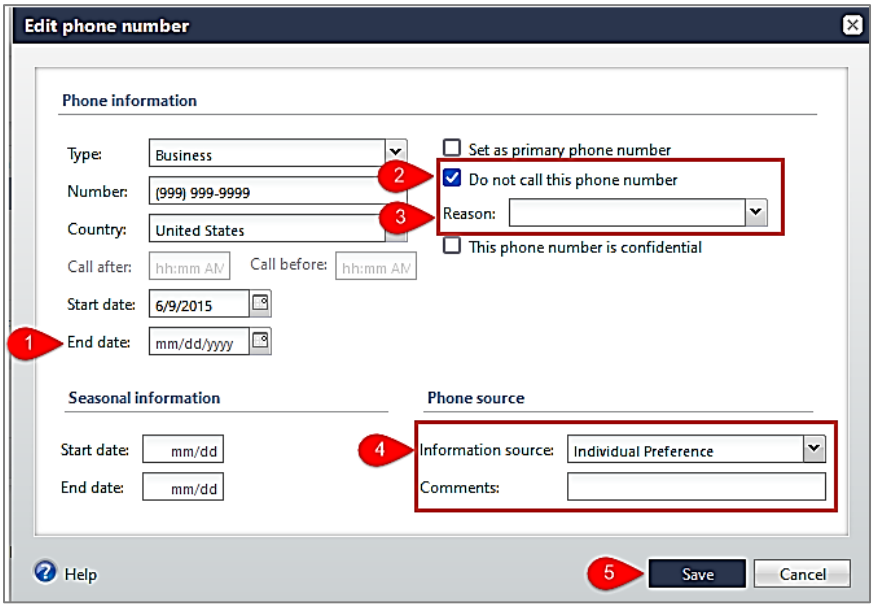
Mark the valid number as Primary by following the Phone Number Updates steps above and checking the Set as primary phone number box.

On the bad phone number, follow the Edit a phone number steps above.

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1. Add an **End Date when possible**.
2. Check the **Do not call** this number box.
3. Select a **Reason** from the Reason drop-down menu. For additional information on which reason code to choose see the documentation on **Understanding Do Not Contact**.
4. Update the **Information source** including any appropriate additional **comments**.
5. Click **Save**.



Note: If there are no other valid phone numbers on the record, you will not be able to add an End date. This is because there always must be one number designated as Primary. In this case, only update the Do not Call box, the Reason, and the Information Source. When a new phone number is found, that can be marked as primary, and the former phone number can be deleted.

REVIEWED 7/30/24

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ADD & UPDATE EMAIL ADDRESS INFORMATION

COMMUNICATING WITH THE CONSTITUENT VIA EMAIL

Email addresses in TED are a method used to contact a constituent via email. Several different email address types are stored on a constituent record. Types include personal, business, campus, and assistant.

Email address information is intended to be used for the purpose of contacting the constituent either through personal correspondence or mass communications. The primary email address on a record is pulled for any mass communication lists, ad hoc list requests, segmentation, or personal correspondence. For this purpose, it is important to note if an email address is used by the constituent year round or on a seasonal basis. This will help ensure that electronic communications are received correctly by the constituent at the email address of their choice.

It is important to note that constituents can request to not be contacted by the university, college, or unit at a specific or any address. These requests are indicated on the record by a Do not mail flag or a solicit code.
A Do Not Email flag is added to indicate that a constituent does not want a specific email address contacted and will appear on their TED record in the form of an exclamation symbol. An email address can be marked Do Not Call for a variety of reasons.
A Solicit Code is added to indicate that a constituent does not want to receive mass communications and applies to all email addresses, current and future on the record.

Email Address Types and Locations

Personal, campus, and assistant email addresses are linked to an individual constituent and found on the constituent's individual record.

Business email addresses are linked to an organization and found on the organization record.

Note: The business email address associated with a constituent's place of employment will be added to the individual record when the employment relationship is created between the constituent and the organization. It should not be added directly to the individual constituent's record via the Contact Tab.

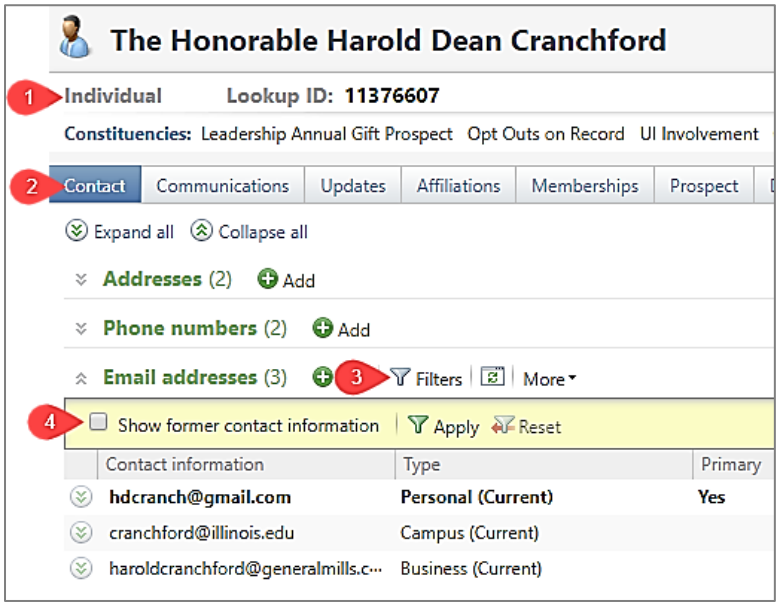
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Viewing Email Information on the Record

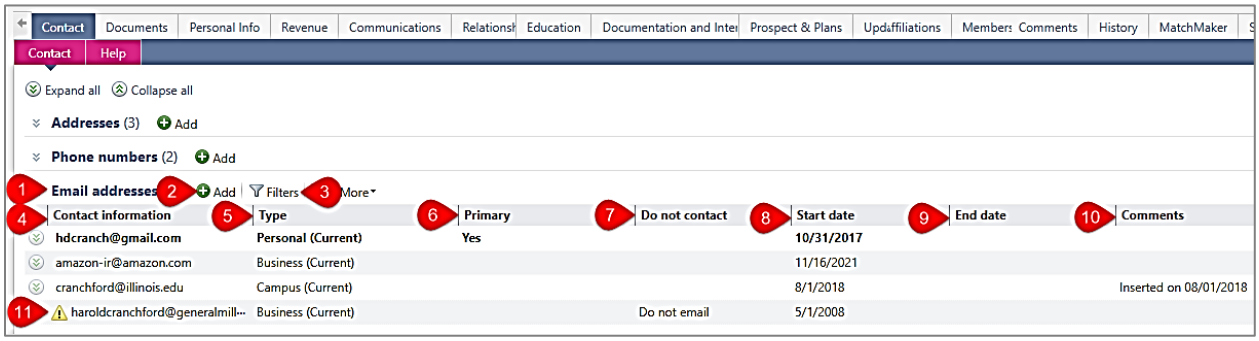
The Contact tab on an individual constituent's record contains the constituent's email address information.

9. Navigate to a constituent record in TED. For adding or updating email addresses for a person, ensure that you are on the **Individual** constituent record.
10. Select the **Contact** tab.
11. To view all Email Addresses on the record, you may need to set your filter so you can see former contact information. Click **Filters**.
12. Click **Show Former Contact** Information and then **Apply**.



Email Addresses that have been End Dated indicate that the constituent is no longer using that specific email address. It is important to review the former contact information prior to adding a new email address to the record. It is unnecessary to add an email address that is already on the record but contains an end date.

Content Tab Details



22. The Contact tab has multiple sections. In this document we are focusing on the **Email Addresses** section. The section header indicates both which section and how many pieces of contact information are available in that section. *Note this number will change as filter settings are applied and removed.
23. The **Add** option allows the user to directly add a new email address to the TED record.

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24. Selecting the **Filters** option will expand the section header information and allow the user to select Show former contact information and Apply. This option allows the user to see any email address that has been end dated.
25. The **Contact information** column in the Email Address section displays the constituent's email address.
26. The **Type** column in the Email addresses section displays the type of email address associated with the contact information.
27. The **Primary** column in the Email Addresses section indicates if the email has been marked Primary for the constituent. The Primary email address is the address pulled in all mass communication requests.
28. The **Do Not Contact** column in the Addresses section indicates if the email address has been marked Do Not Email. A Do Not Email flag is added to the email address when that specific address should not be used. An email address can be marked Do Not Mail for a variety of reasons.
29. The **Start date** column in the Email addresses section identifies when the constituent began using that specific address.
30. The **End date** column in the Email addresses section identifies when the constituent stopped using that specific address.
31. The **Comments** column in the Email Addresses section displays all comments made in connection with the email for a constituent record.
32. An **Exclamation point** on the address further indicates that the email address has been marked with a Do Not Email flag.

Adding a New Email Address to a Record

After reviewing a constituent's Contact Tab and former contact information it may be necessary to add a new email address to the record.

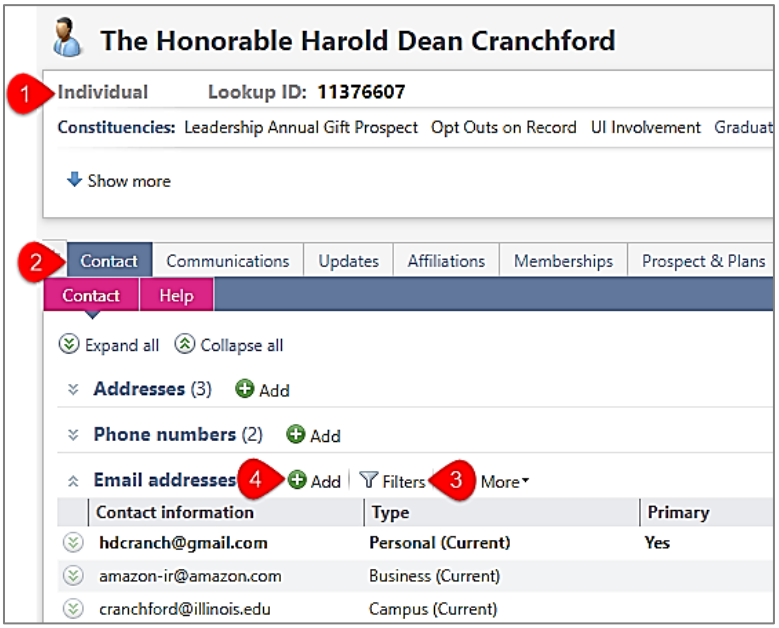
Understanding the options available when adding a new email address to a record is important in ensuring that the email address has been added correctly.

To begin navigate to the appropriate individual constituent record. On the Contact Tab find the Email address section.

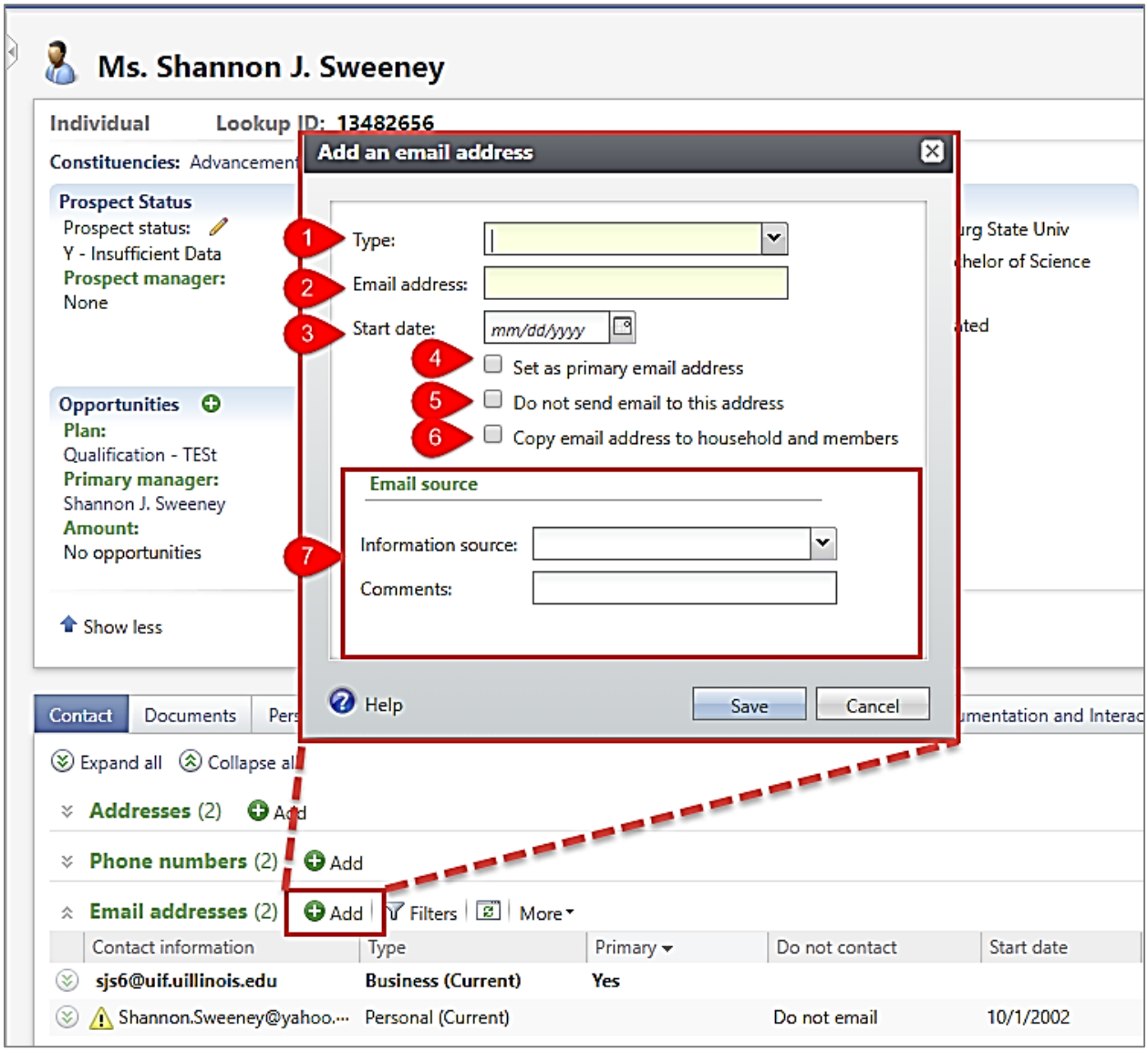
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1. Begin by navigating to the constituent's **Individual** constituent record in TED, or Organization record if the constituent if an organization. All Email address information used for mass mailings are pulled from Individual or Organization records, not household records.
2. Select the **Contact** tab.
3. Use the **Filters** option to verify that the email address is not already on the record.
4. Click the **Add** button.



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1. Select the Type from the drop-down menu:
    a. **Personal** – Any email address the constituent is using for personal reasons.
    b. **Business** - Any email address the constituent uses solely for business reasons. This address should be the address given to them by their place of employment.
    c. **Campus** – Any email address associated with the University of Illinois system.
    d. **Assistant** - Constituents may request that any communication go through their assistant for review and response.
2. Enter the **Email Address**.

Email addresses on an organization should be specific to the organization, not to an individual constituent (i.e. customerservice@illinois.edu vs john.smith@illinois.edu)

3. Enter the **Start date**.

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4. Check the box next to **Set as primary email address** to make this the Primary Email Address on the record. A record can only have one primary email, which will be listed at the top of the list.
5. If this Email Address should not be used, check the **Do not send email to this address** box.

***** The reason to add an Email Address and mark it as Do Not Email is to indicate to others that may find the email address and attempt to add it to TED can see that it should not be used even though it is a valid email address. *****

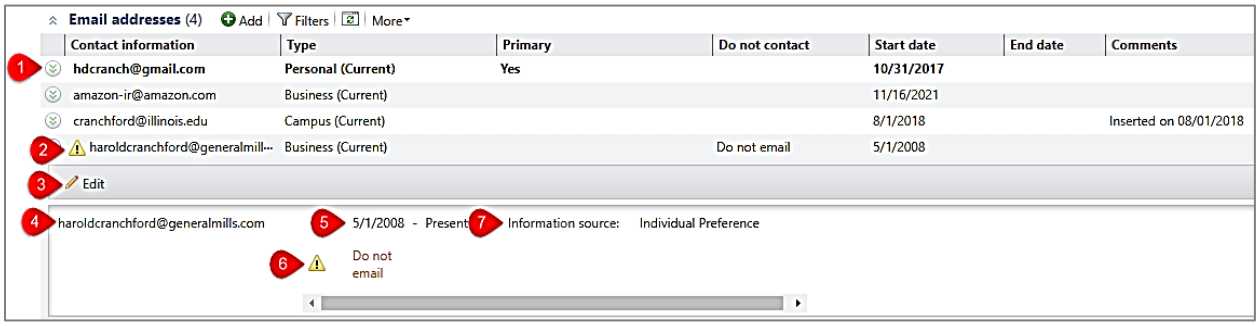
***** The Do Not Email flag should not be used if a constituent does not want to receive mass communications. The reason for this is because even if you mark an email as "Do not Email", if a new email is added in the future, the constituent would then start to receive mass communications at that email. A Solicit code will apply to all Email Addresses, current and future. *****

******The proper method to add a Solicit code is by logging in to UIF Support using the link https://support.uif.uillinois.edu and* submitting a UIF Support Advancement Services Ticket, selecting 'Data Services', 'I have a list/need an update', and 'Solicit Code: UPDATE' in the ticket drop down fields below.**



6. Check the **Copy Email Address to household and members** box if you want to copy this email to those records. Only use this option for a business email if both members have a relationship with that business.
7. Select the **Information Source** of where you found this Email Address from the drop-down menu. Fill in any additional **Comments**.

Expanded Email Address Details



16. The **double arrows** to the left of the email address will expand the contact area to show additional details.
17. The **exclamation** identifies that there is a Do Not Email flag on the address.
18. When the address has been expanded the **Edit** option becomes available.
19. The **expanded area** shows the exact way the address has been formatted.
20. This area indicates the **dates** the email address is or was valid.

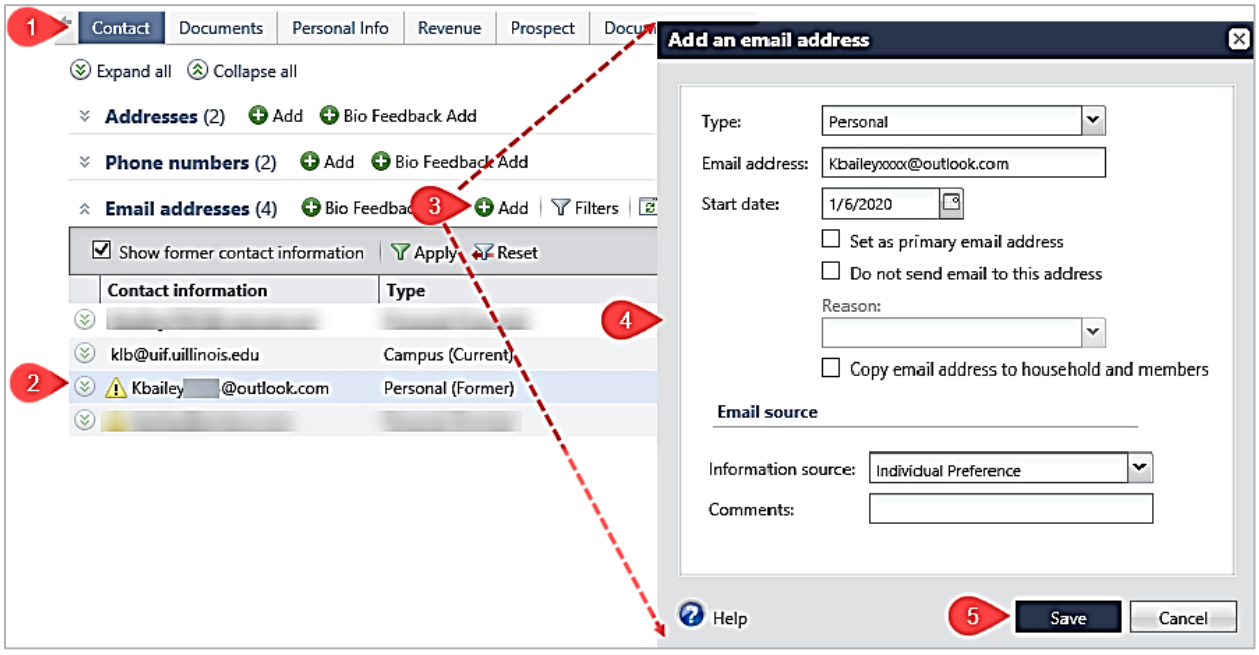
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21. If there is a **Do not email** flag on the address the reason will show in the expanded address.
22. The **Information source** will expand to detail where the information as found.

Editing an Email Address on a Record

Email Addresses should only be edited if they are no longer valid, if they contain an error, or to mark them as primary if appropriate. If a constituent changes to a new email address, add the new email address instead of editing on already on the record. This allows us to keep the historical record of the constituents old email addresses so they are not entered again in error.



7. Click the **Contact** tab on the individual constituent record.
8. Click the **double chevron** to the left of the Email Address you want to edit.
9. Click **Add**.
10. Update fields as needed.
11. Click **Save**.

Marking an Email Address Unknown

If you receive a bounce back or invalid email address message for an Email Address, attempt to find an updated email for the constituent. If you cannot locate a new Email Address, but there is another valid email on the record, take the following steps:

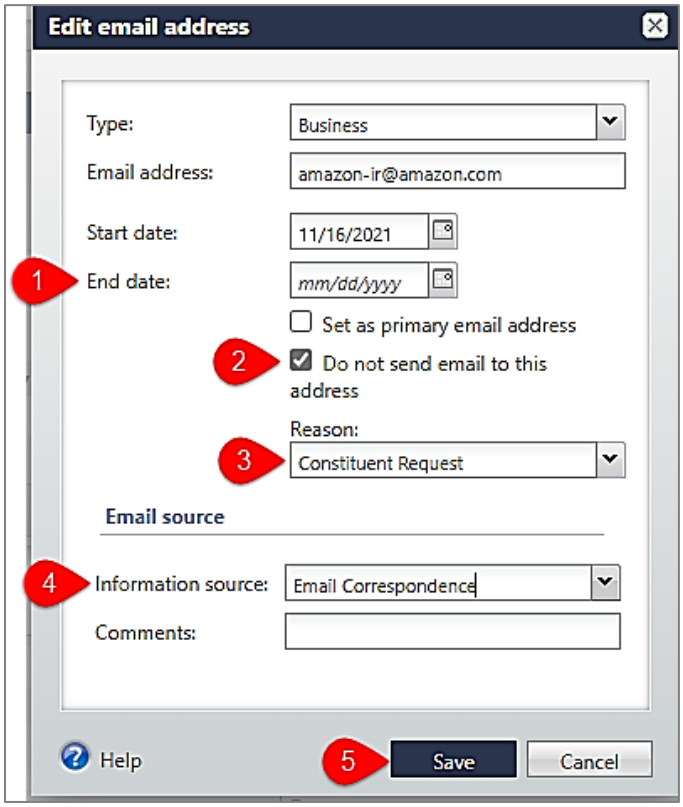
Mark the valid email address as Primary by following the Email Address Updates steps above and checking the **Set as primary Email Address** box.

On the bad email address, follow the Edit an email address steps below.

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1. Add an **End Date** when possible.
2. Check the **Do not send email to this address** box.
3. Select a **Reason** from the Reason dropdown menu. For additional information on which reason code to choose, see the document **Understanding Do Not Contact**.
4. Update the **Information Source**.
5. Click **Save**.



NOTE: If there are no other valid Email Addresses on the record, you will not be able to add an End date. This is because there must always be one email designated as Primary. In this case, only update the Do not send email to this address box, the Reason, and the Information Source. When a new Email Address is found, that can be marked as primary and then the former address can have an End date added.

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ADD & UPDATE SOCIAL MEDIA INFORMATION

COMMUNICATING WITH THE CONSTITUENT USING SOCIAL MEDIA

The details of a constituent's social media accounts in TED are a method used to contact a constituent via social media. Several different social media service types are stored on a constituent record. Types include LinkedIn, Instagram, Goggle+, and more.

Social Media information is intended to be used for the purpose of either finding out more information about the constituent, such as when LinkedIn is used, or to communicate with the constituent, such as when Facebook is used. Currently Social Media information does not require a primary account.

It is important to note that constituents can request not to be contacted by the university, college, or unit at a specific or any address. These requests are indicated on the record by a Do not mail flag or a solicit code.
A Do Not Mail flag is added to indicate that a constituent does not want a specific address used and will appear on the TED record in the form of an exclamation mark symbol. An address can be marked Do Not Mail for a variety of reasons.
A Solicit Code is added to indicate that a constituent does not want to receive mass communication and applies to all current and future addresses on the record.

Social Media Types and Services

Social Media types and services available are as follows:

- Facebook
- Instagram
- LinkedIn
- Twitter
- WeChat

Personal social media sites, or sites about the individual or containing personal information about the individual, are stored on the constituent's individual record.

Business social media sites, or sites about the organization or containing details specifically on the organization, are stored on the organization record.

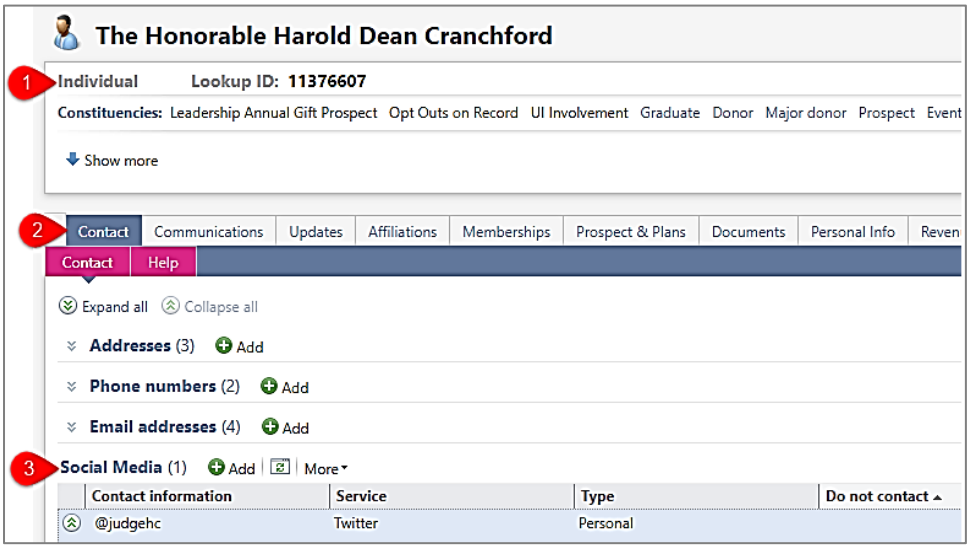
Note: All social media information should be added directly to the constituent's record via the Contact Tab. Currently there is no separation between personal, business, or employment social media account types.

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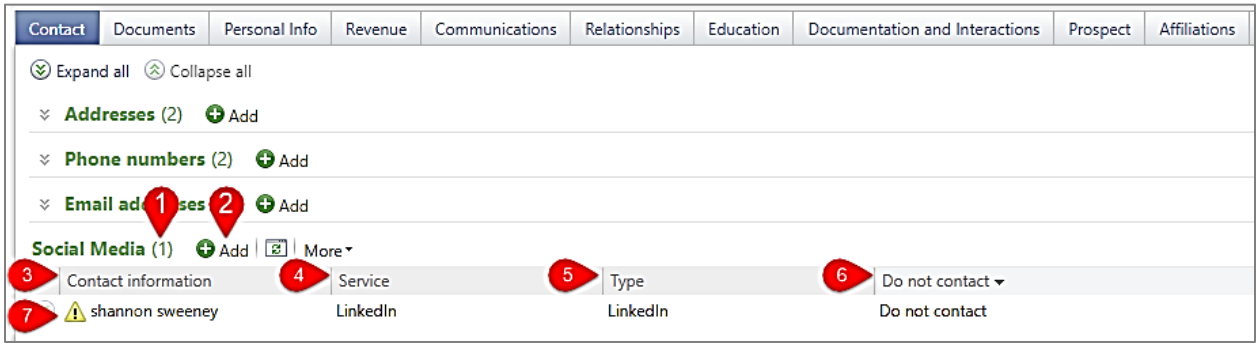
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Viewing Social Media Account Information on the Record

1. Navigate to a constituent record in TED. For Social Media Account information for a person, ensure that you are on the **Individual** constituent record.
2. Select the **Contact** tab to view the contact options.
3. Select **Social Media.**



Contact Tab Details



33. The Contact tab has multiple sections. In this document we are focusing on the **Social Media** section. The section header indicates both which section and how many pieces of contact information are available in that section. *Note this number will change as filter settings are applied and removed.
34. The **Add** option allows the user to directly add a new social media account to the TED record.
35. The **Contact information** column in the Social Media section displays the constituent's username on the social media site.
36. The **Service** column in the Social Media section displays the service type of media associated with contact information.
37. The **Type** column in the Social Media section displays the type of social media and should match the Service column.

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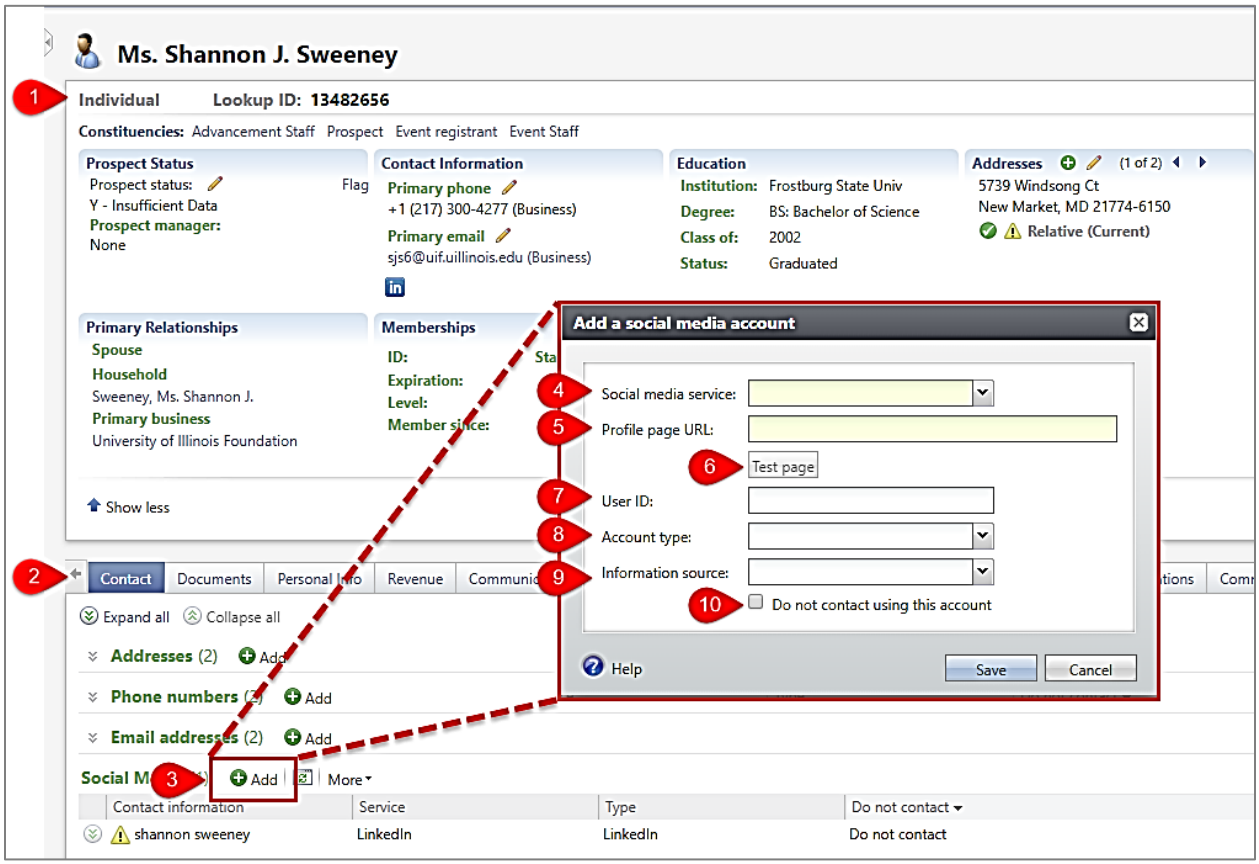
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38. The **Do Not Contact** column in the Social Media section indicates if the social media site has been marked Do Not Contact.
39. A Do Not Contact flag is added to the social media site when that specific site should not be used to contact the constituent.

Adding a Social Media Account

After reviewing a constituent's Contact Tab, it may be necessary to add a new social media account type to the record.

Understanding the options available when adding new social media information to a record is important in ensuring that the account has been added correctly.



1. Begin by navigating to the constituent's **Individual** constituent record in TED, or **Organization** record if the constituent is an organization. All Social Media Account information used for mass communications is pulled from Individual or Organization records, not Household records.
2. Click the **Contact** tab.
3. After verifying that the Social Media Account is not already on the record, click the **Add** button.
4. Select the **Social Media Service** from the dropdown menu:
    - Facebook

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- Instagram
- LinkedIn
- Twitter
- WeChat

5. Enter the **Profile page URL**. This is the direct link to the constituent's page on the social media site.
6. Test the Profile page URL using the **Test page** option to ensure that it goes to the specific constituent's social media page.
7. The User ID should automatically fill based on the Profile page URL. If it does not auto populate, manually enter the **User ID** for the constituent.
8. Select the **Account Type** from the drop-down menu:
    - Facebook
    - Instagram
    - LinkedIn
    - Twitter
    - WeChat
9. Select the **Information Source** of where you found this Social Media Account from the drop-down menu.
10. If this Social Media Account should not be used, check the **Do not contact using this account** box.

***** The reason to add a Social Media Account and mark it as Do Not Contact is to indicate to others that may find the Social Media Account and add it to TED that even though it is a valid social media account type, it should not be used. *****

***** The Do Not Contact flag should not be used if a constituent does not want to receive mass communications. Even if you mark a social media account as "Do not contact", if a new social media type is added in the future, the constituent would then start to receive mass communications at that social media account. A Solicit code will apply to all Social Media Accounts, current and future. *****

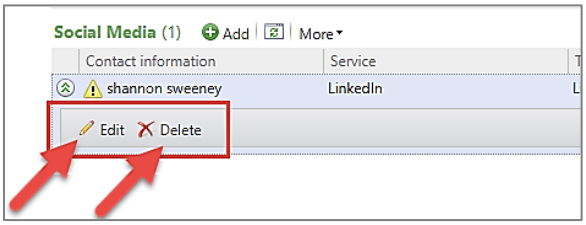
******The proper method to add a Solicit code is by logging in to UIF Support using the link https://support.uif.uillinois.edu and* submitting a UIF Support Advancement Services Ticket, selecting 'Data Services', 'I have a list/need an update', and 'Solicit Code: UPDATE' in the ticket drop down fields below.**



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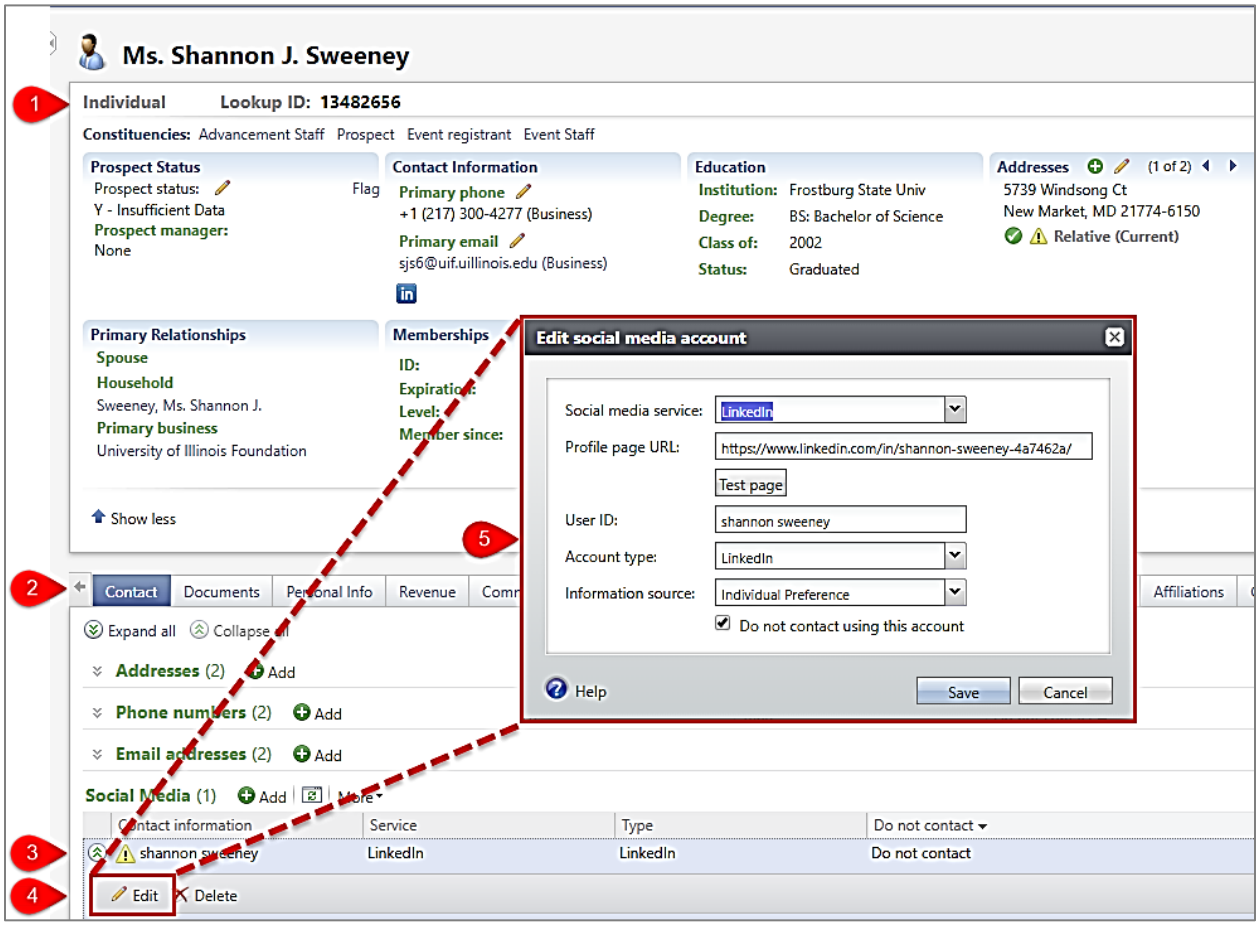
Expanded Social Media Details

Using the double arrows to the left of the constituent's social media id will allow you to Edit or Delete the social media account. Expanding the selection shows no other additional information.



Editing a Social Media Account

Social Media Accounts should only be edited if they are no longer valid, or if they contain an error. This allows us to keep a historical record of the constituents' old Social Media Accounts so they are not entered again in error.



12. Navigate to a Constituent record.
13. Click the **Contact** tab.
14. Click the double chevron to the left of the **Social Media Account** you want to edit.
15. Click **Edit**.
16. Update fields as needed.
    Click **Save**.

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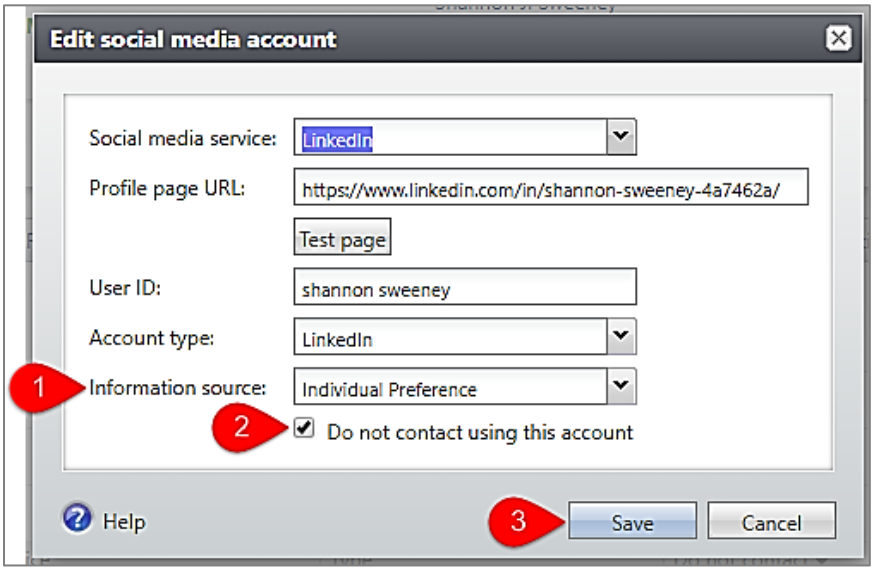
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Marking a Social Media Account Unknown

If you receive an invalid Social Media Account message for a Social Media Account, attempt to find an updated social media account for the constituent. If you cannot locate a new Social Media Account, take the following steps:

On the bad social media account, follow the Edit a Social Media Account steps below.

1. Update the **Information source**.
2. Mark the social media account as **Do not contact using this account**.
3. Click **Save**.



NOTE: If there are no other valid Social Media Accounts on the record update the **Information Source**, and the **Do not contact using this account** box to indicate the social media account is no longer valid. When a new Social Media Account is found, it can be added, but the invalid, or old social media account, is not deleted.

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UNDERSTANDING DO NOT CONTACT

WHEN NOT TO CALL, MAIL, EMAIL OR CONTACT A CONSTITUENT

There are times when the contact information for a constituent is incomplete, outdated, or inaccurate. When this happens, information is not deleted from the system. It is marked **Do not mail, Do not call, Do not email,** and **Do not contact**.

These options are intended to be used for the purpose of storing contact information that needs to be kept on file, regardless of if it is used for communication purposes. A common reason to choose these options is if the contact information you have is the only contact information, but it is no longer valid; however, you do not have a replacement for it yet.

It is important to note that a Do not mail, Do not call, Do not email, or Do not contact flag is linked to a specific address, phone number, email address or social media site on the constituent's record not all contact data on the record. If you need a constituent removed from future communications or solicitations at the department, college, campus, or University level, complete a request to have a solicit code added to the constituent's record.

Mass Communication Lists

IMPORTANT – When mass communication lists are pulled, Mail Preferences and Solicit Codes on a constituent's record are applied to **all** contact data on file (phone, email, address, or social media) depending on the type of code.

The *Do not contact* option does not apply to all contact data for a constituent, but only on the specific contact data that has been marked.

Do Not Mail

Do not send mail to this address (aka: Do Not Mail)

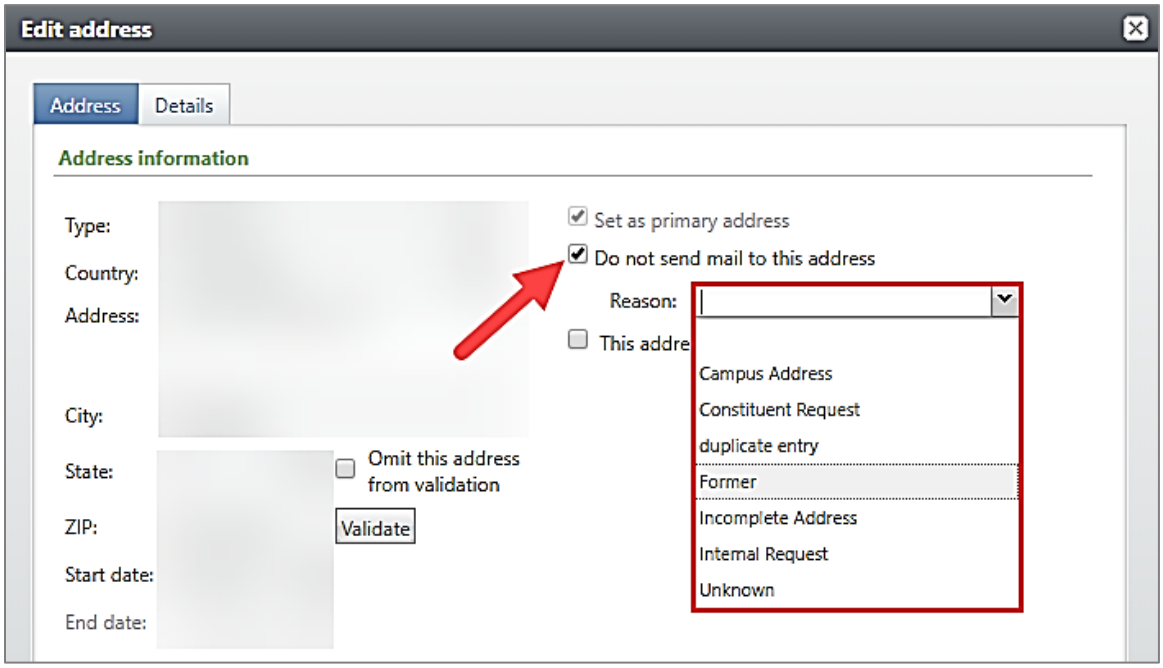
This indicates to Advancement staff that even though a particular address is/was a valid address, it should not be used for mailings. This option applies only to the specific address marked.

Mark an address as **Do not send mail to this address** if:

- The constituent has asked us not to mail to them at that specific address.
- A unit has determined that an address won't be used.
- When a new or "good" address is not available, such as in the case of returned mail. NOTE – If mail is returned with a new address, then the new address should be entered, and the old address end dated. It is not necessary to mark it as do not mail because the end date will prevent the address from being used.

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Include the **Reason** when marking the Do not send mail to this address. Reason codes are as follows:

- Campus Address - Constituents should not be contacted via their campus address.
- Constituent Request - The constituent has asked us not to mail to them at that specific address
- Former - When a new or "good" address is not available, and there are no other options. Contact data must have a primary address. Primary addresses can not be end dated or replaced. If mail is returned with no additional information or updated address the data is marked Do Not Mail.
- Incomplete Address – If the available contact information is limited and incomplete, such as city and state but no street address, the address is marked Do Not Mail.
- Internal Request – When a unit has determined that a specific address will not be used.
- Unknown – When the mail is returned for unknown reasons and no additional information.

Additionally, add any additional information to the **Comments** section under the Address Source.

Do Not Call

Do not call this phone number

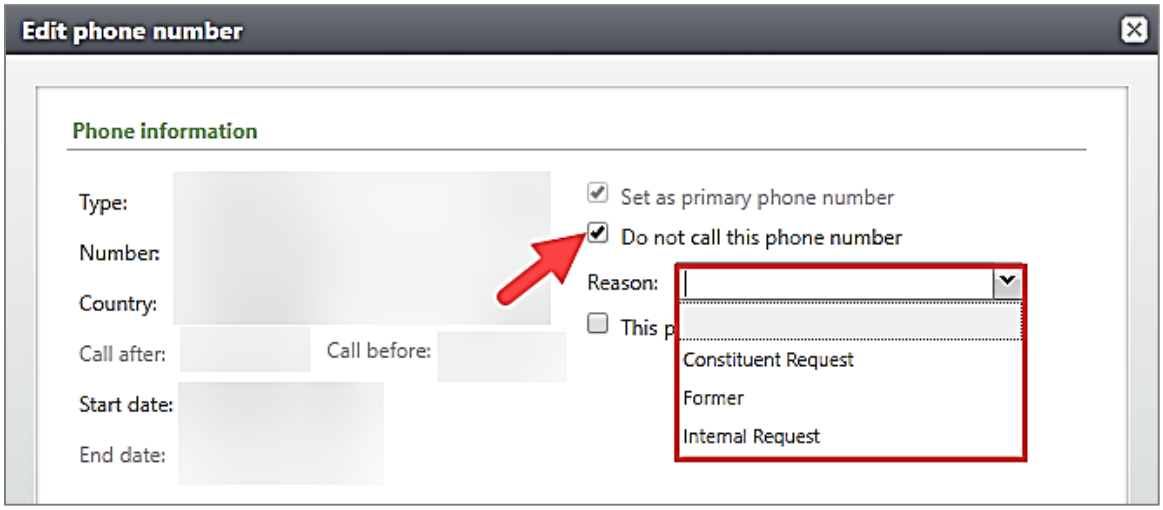
This indicates to Advancement staff that even though a particular phone number is/was a valid number, it should not be used for callings. This option applies only to the specific phone number marked.

Mark a number as **Do not call this phone number** if:

- The constituent has asked us not to call to them at that specific number.
- A unit has determined that a phone number won't be used.
- When a new or "good" phone number is not available.

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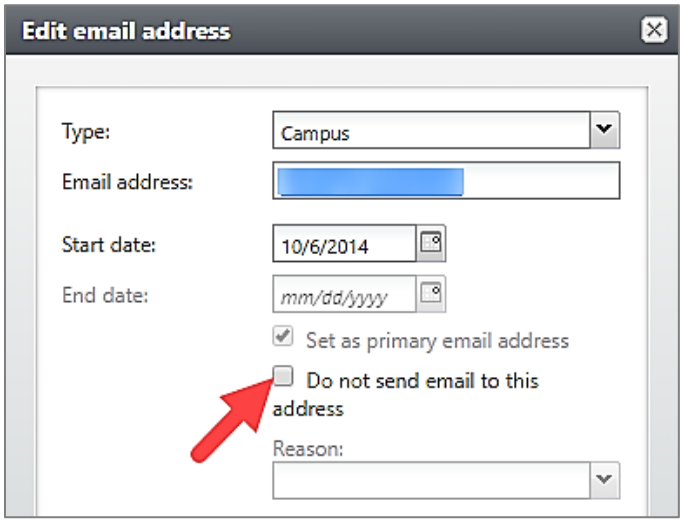


Include the **Reason** when marking the Do not call this phone number. Reason codes are as follows:

- Constituent Request - The constituent has asked us not to call to them at that specific number.
- Former - When a new or "good" phone number is not available and there are no other options. Contact data must have a primary phone number. Primary phone numbers can not be end dated or replaced. If phone lines are disconnected or unable to complete with no additional information the data is marked Do Not Call.
- Internal Request - A unit has determined that a phone number won't be used.
- Restricted

Additionally, add any additional information to the **Comments** section under the Phone Source.

Do Not Send Email to this Address



Do not send email to this address

This indicates to Advancement staff that even though a particular email address is/was a valid address, it should not be used for emails. This option applies only to the specific email address marked.

Mark an email **Do not send mail to this address** if:

- The constituent has asked us not to email to them at that specific email address
- A unit has determined that an email won't be used.
- When a new or "good" email is not available.

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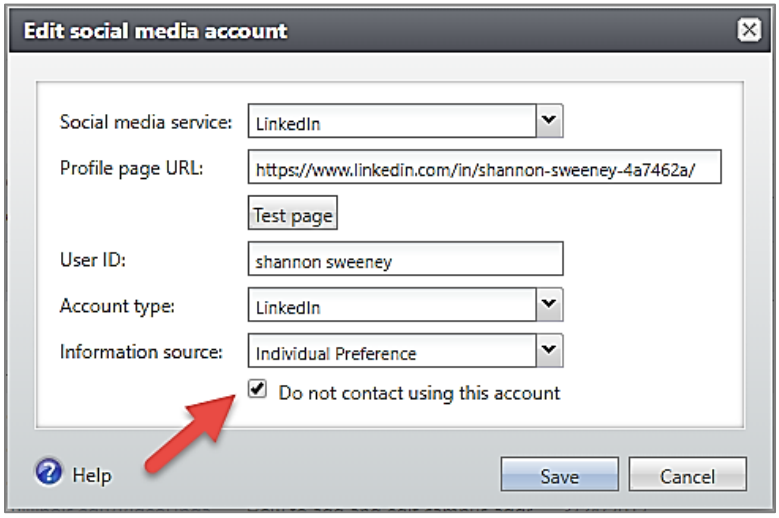
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Additionally, add any additional information to the **Comments** section under the Email Source.

Do Not Contact

Do not contact using this account

This indicates to Advancement staff that even though a particular social media site is/was a valid site, it should not be used to contact the constituent. This option applies only to the specific social media site marked.



Additionally, update the information source to indicate how the new information was found.

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DOCUMENTATION AND INTERACTIONS TAB

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SURVEYS

Business Information/ Surveys in Aggregate

Surveys are a valuable tool that helps better understand a targeted set of constituents and are traditionally used in aggregate for the insight into a population to assess or adjust strategies as a whole or in part. Surveys conducted by advancement (Or University partners) fall into a variety of categories that include census, alumni (or subsets of alumni), donors (including first time or online donors), program (Foundation Members or parents program participants), career and branding.

Survey data that is compared in a consistent format across multiple surveys, can be used to determine changes that occur over time. For example, has brand awareness improved? Is the general sentiment about philanthropy at the UIUC positive? Is a certain program more successful now than it was five years ago? Are there specific individuals whose opinion has drastically changed for the negative that should be addressed?

Business Information/ Personalized Survey Data

Surveys can also provide some insightful information that is beneficial to manage strategies for individual respondents or in like groups.

Attitudinal or Behavioral Survey Responses ->>

For instance, if a respondent's replies indicate that their education here has transformed their life and if we know that they are a high capacity, never-visited non-donor, they could be a candidate for a qualification strategy. Or if another respondent's replies indicate that they are a strong supporter of the arts although they may not have any connection to the arts at UIUC, they could be a candidate for the segmentation strategy for marketing communications or an annual giving solicitation for the arts.

Open-ended Survey Responses ->>

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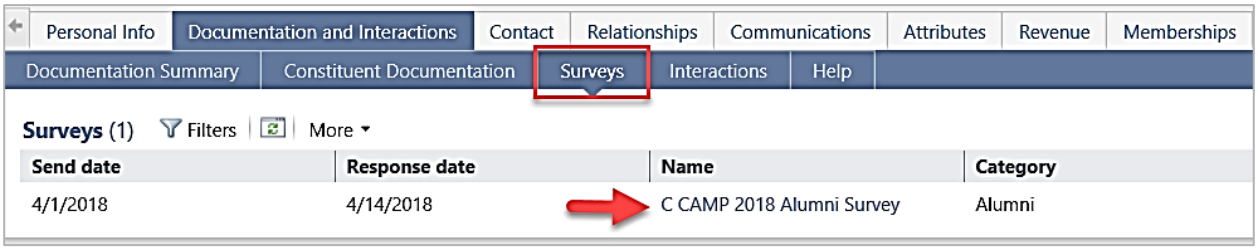
Sometimes open ended questions prompt the sharing of information by respondents that we otherwise would or could not know. Professors, programs or the entire University experience can positively or negatively impact a respondent's life. This information can be vital to refining the strategy for that constituent.

Demographic and Other Survey Responses ->>

Obtaining demographic, contact or other information in order to learn more about a respondent enables us to improve communication and learn more about that person. Race/ethnicity data that was not provided via the student or faculty load process can be supplemented through surveys. Gathering information about student involvement or recent individual engagement with the institution outside of advancement are also vital survey components.

TED Information/ Survey Data

Much of the information gleaned from survey results can be loaded into TED. In the most basic form of integration, the Survey area in TED (Documentations & Interactions tab of an individual record) can house a list of which surveys the constituent completed as well as his/her own answers to those questions.



Creating Common Language in Survey Results ->>

Because surveys are created and managed by myriad units and universities for varying purposes and often in conjunction with different third-party survey vendors, the format of the questions may change from survey to survey, making it difficult to assess positive or negative changes in perception or engagement. However, the questions used for advancement surveys are mostly

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aimed at collecting similar information, despite the varying survey managers. As such, the survey tool itself for each survey will be imaged, where possible, in OnBase and surfaced in TED, while the results of the surveys on each individual record will be "standardized" into these common question types following:

Overview questions are broad attitudinal and behavioral questions and assess things like a respondent's connection to the subject matter, overall opinion/experience and alumni experience.

Value of Degree questions get to the respondent's views of the value of their degrees and how the degree prepared them for certain types of activities. Examples would ask about their decision to attend and preparedness.

Brand or Communications questions provide insight into general audience sentiment, the most effective marketing/communications platforms for reaching an audience as a collective group or individually, as well as what specific types of content and subjects will resonate with the respondents. Examples would include a respondent's opinion on reputation, brand messaging, importance of communications channels and elements and frequency of communication and promotion.

Demographic questions gather information that might otherwise not be available in the advancement database. These questions can be useful in understanding the survey results and can also drive strategy changes to better serve. An example would be ethnic origin.

Loyalty questions attempt to classify the respondent's top University of Illinois affiliations. These questions assist in developing an advancement strategy at the appropriate level within the institution for identifying specific engagement opportunities or influencers that might make an impact on the respondent's interest in volunteering, hiring, giving, etc. Examples would be to ask the subject their extent of loyalty to a department, major university in general, instructor, classmates or healthcare provider.

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Impact on Opinion questions determine what influences a constituent's feelings about the university, including campus aesthetics, media visibility, tradition, rankings, accomplishments of faculty or students, success of athletic programs, community outreach, diversity and inclusion, etc.

Student Experience questions can assist in determining what messaging or programming might best resonate with respondents as a whole or with specific individuals. They also help to uncover gaps in the advancement database for student engagement data. Examples would include gathering their opinion of student experience, how important their student experience was to them, and their level of student participation.

Engagement and Participation questions determine what types of engagement opportunities will be most appealing to constituents, as a whole or as individuals, what objections are most common among those not attending, what physical or virtual spaces might lead to the highest engagement, etc. Examples include asking about their past participation, how likely they are to participate, what would prevent them from participating and where they may be most likely to attend an event.

Philanthropic questions can supplement existing wealth models and data while providing insight into charitable inclination and interests among constituents. These questions can assist in determining ask designations, donor behavior, and fundraising program effectiveness. Examples include questions regarding their charitable giving frequency, loyalty, and causes. Another example could be asking the level of importance they place on the cause, mission, efficiency, fiscal responsibility, programs and services, vision and leadership, direct involvement, resource needs, and tangible benefits of the organization. Other examples could be about their charitable giving channels, or methods, how they would want to be recognized and how satisfied they were with their interactions with the organization they gave to.

Program-Specific questions are unique to a particular program within advancement, such as a Parents Program, Alumni Career Services, Foundation Membership Program, etc. These can help guide the direction for the programs or can identify influencers and key stakeholders in that program's space. An example of this would be about how important that service or program is to them.

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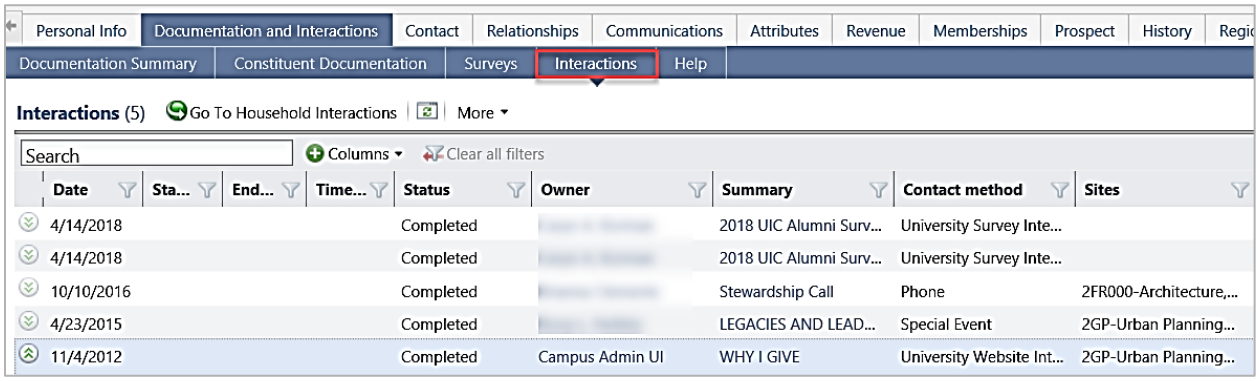
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Adding First-Class Data to TED

Existing data in TED such as contact information, first generation student, race/ethnicity, marital status, etc. can and often should be updated as a result of a survey.

Loading Narrative Responses to TED

Open-ended survey responses can be loaded into the Interactions area of TED illustrating the word- for- word responses from that constituent.



Analyzing Additional Responses for Possible Addition to TED

In some cases, the data needs to be analyzed to determine whether it is a duplicate of existing information in TED.

UIC Alumni Survey

The UIC 2018 Alumni Survey –managed by PEG LTD through its Alumni Attitude Study program was launched on April 1, 2018, and closed on May 7, 2018. It was commissioned by the Office of Vice Chancellor for Advancement at UIC as a broad alumni engagement and attitudinal survey to assist in strategic development of the new UIC Alumni Association.

The goal of this specific survey project was to load the University of Illinois at Chicago 2018 Alumni Survey questions and responses into TED. The data was loaded as follows:

- Typical survey responses to Survey area
- Open-ended responses to the Interactions area

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- Other data to the appropriate first-class fields (email address and race/ethnicity as an example) where possible
- Indices created by the survey manager to the Wealth and Ratings area
- Additional data to the appropriate locations in TED, after analysis (student involvement committees after evaluating whether this data currently exists in TED.
- Surfacing of blank survey tool in OnBase to be visible on respondent individual records.

Surveys can be found on the Surveys subtab under Documentation and Interactions on individual constituent records in TED.

Next Steps

Additional manual review of the survey data should be conducted by the unit to ensure that specific survey responses that may require additional action (such as adding an opt-out code, addressing issues raised, etc.) are addressed.

Over time, the Survey area in TED will be enhanced to allow for more robust visualization and analysis of the results data and to build a standard survey data integration process into TED. This will ensure that all advancement users have the crucial information collected from surveys that occur across the advancement enterprise.

REVIEWED 7/31/24

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DOCUMENTS TAB

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LOCATING DOCUMENTS IN TED & ONBASE

SAVE & FIND CONSTITUENT DOCUMENTATION FOR FUTURE USE

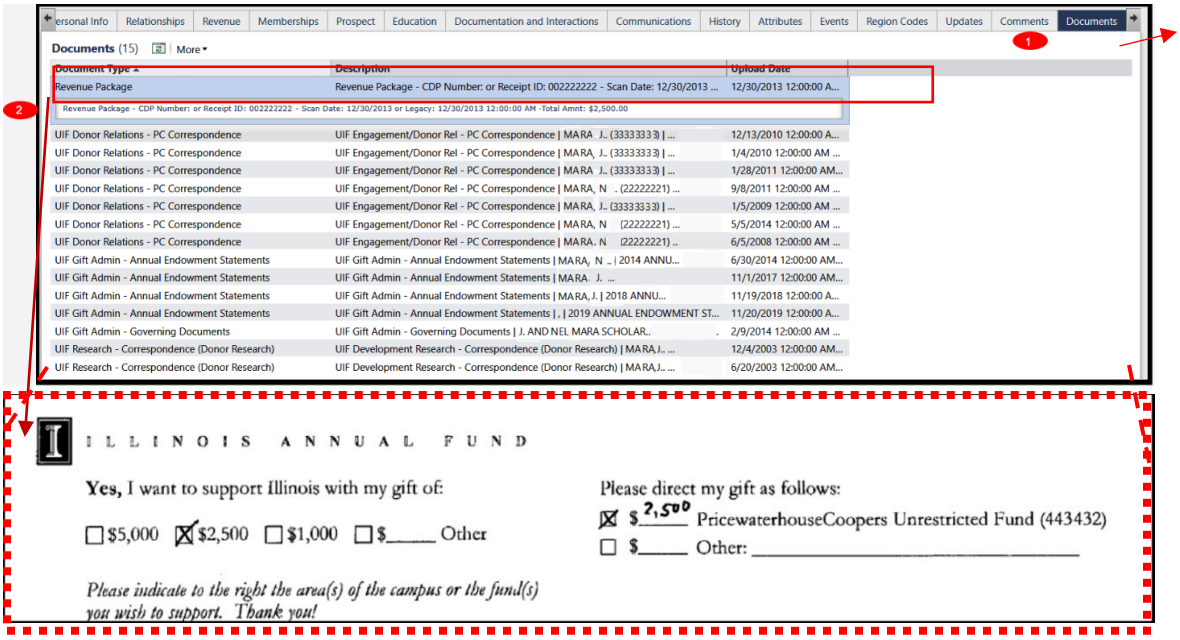
The OnBase system is the full advancement repository for all constituent documentation. Documents are loaded directly to the OnBase system by Foundation and Advancement staff on all three campuses prior to becoming available in the TED system. The majority of documents, including gift images and donor research, revenue, events, bios, and business operations, are available in TED.

Locating Documents In TED

Documents can be found in two locations in TED depending on the type of document and the date they were added.

Documents on the Individual Constituent Record

Gift documentation from 1/1/2010 through 11/6/2015 currently appears on the **Documents** tab on an individual constituent record. The **Documents** tab also contains all other documents for the constituent such as biographies.

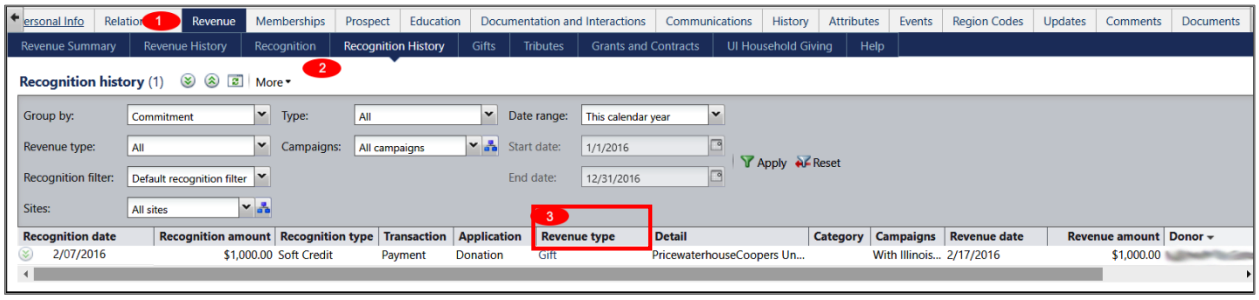


1. On a constituent's Individual record, click the **Documents** tab.
2. Click the **double arrow** circle next to the document you want to view.
3. Click the **link** that appears below to open the document via the DocPop window after you Log in with your Net ID and password.

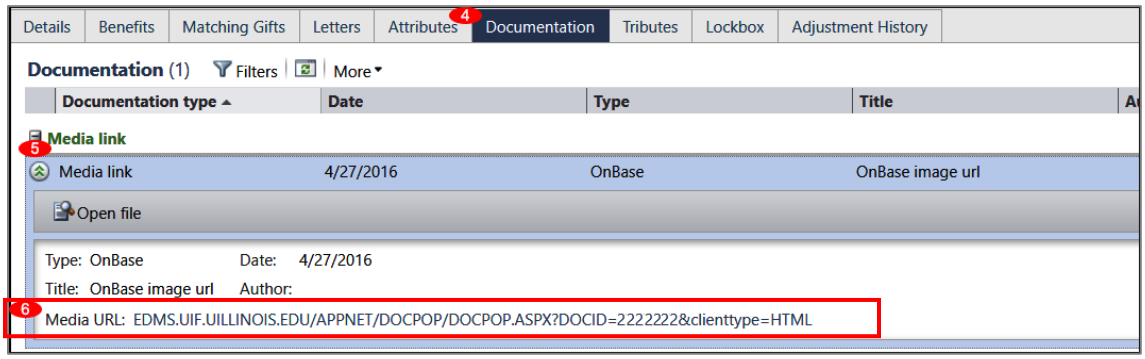
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Documents on the Revenue Transaction Record

Gift documentation that has been added since the TED launch on 11/23/2015 appears on Revenue Transaction records, which is accessible from the Revenue tab on a constituent record.



1. Click the **Revenue** tab on a constituent record.
2. Click the **Recognition History** sub-tab to view each transaction.
3. Click the **Gift link** to open the Revenue Transaction record.



4. Click the **Documentation** tab.
5. Click the double-arrow circle next to **Media link**.

Click the link that appears to view the document in the DocPop window after you login with your Net ID and password. If you click the link and receive a "Document Not Found" error, you may not have permission to access the document. Please contact aims@uif.uillinois.edu, (217) 300-3907 for assistance.

The DocPop Window

In both locations, clicking on the link will take you to a log in screen. Log in with your Net ID and password. Depending on your settings and the type of file, it will either open in a browser window or directly into the appropriate program, such as Microsoft Word. Opening a document this way is referred to as **DocPop**.

REVIEWED 6/18/25

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ADDING DOCUMENTS TO TED & ONBASE

ADD CONSTITUENT DOCUMENTATION FOR FUTURE USE

Documents in TED are added via the OnBase electronic document management system. Most users have access to import documents directly. Once your document is imported you can access it via OnBase. Certain document types will appear in TED within 24 hours of being imported. These are viewable on the Documents tab of the constituent's TED record indicated at the time it was loaded into OnBase.

Note: Documents are not added to household records, only to individual and organization records.

Guidelines for Adding Documents

Please observe the following guidelines when adding documents or links to articles and resources pertaining to constituents:

The University of Illinois, and the Foundation are committed to the ethical collection and use of information in the pursuit of legitimate institutional goals. We shall support and further the individual's fundamental right to privacy and subscribe to the following basic principles regarding ethics and confidentiality:

- The principle of the right to privacy
- The principle of information necessity
- The principle of individual ethical responsibility
- The principle of protection of confidential material
- The principle of record sensitivity
- The principle of ethical collection

In accordance with these principles, adhere to the following guidelines.

- Collection of data is limited to public sources, correspondence, and constituent relationships.
- We shall not seek out documents relating to divorce, child custody, probate, or bankruptcy.
- Information should be stated in an objective and factual manner and attributed to the source.

Other Document Types in OnBase

Finally, you may see document types for colleges and university departments. Many colleges and universities (e.g., UIC, UIC Stewardship, UIUC Library and UIUC Colleges of Education, LAS, Media, Law, LER and Fine & Applied Arts) store their constituent records, revenue/transaction records, designation records, and event records in OnBase. TED contains links to OnBase donor, revenue, event, biography, and business operations records. If your department is interested in creating their own Document Types

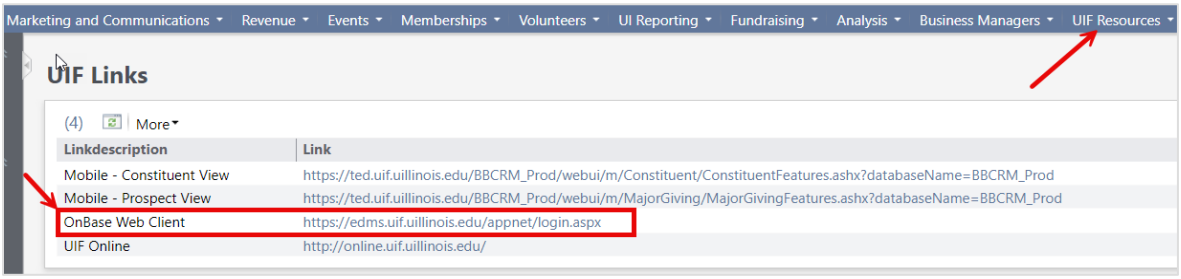
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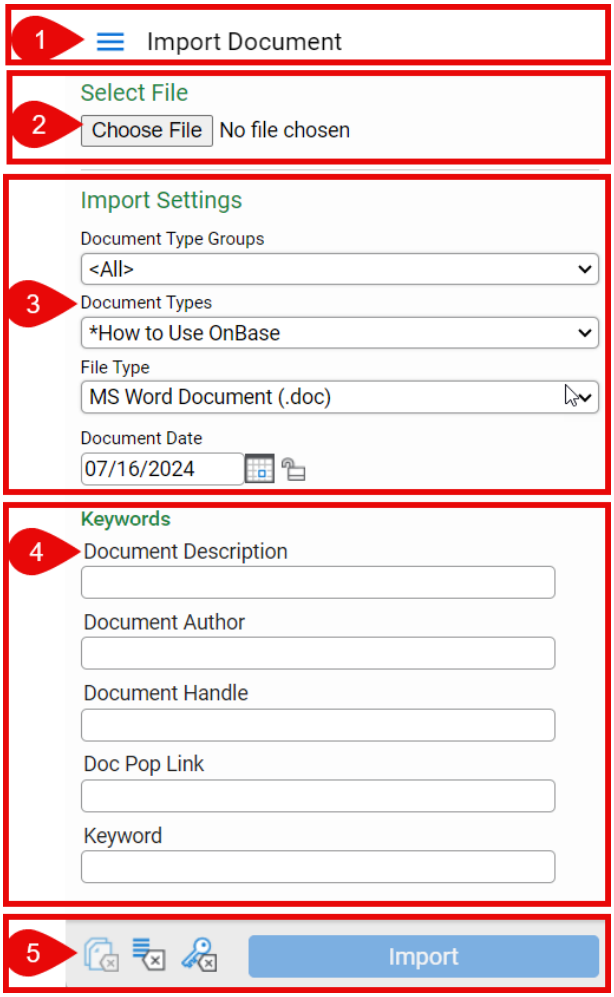
in OnBase, please submit a help ticket via **UIF Support** with a category of **Enterprise Application**, type of **Hyland OnBase** and item of **General**.

Importing Documents into OnBase

Before importing you must login to OnBase by visiting https://edms.uif.uillinois.edu or use the link found in the UIF Links area of the UIF Resources menu in TED.



1. Choose **Import Document** from the drop-down menu.
2. Click the **Choose File** button to locate the file you want to import.
3. Choose the appropriate **Document Type Groups** and **Document Types**. Generally, it is recommended you leave the group set to **<All>** and choose the appropriate **type**. The file type and date are auto-detected but you may wish to alter them. **See note below to have the document appear on a TED record.
4. Enter a **Document Description** and any additional appropriate **keywords**. Additional fields may appear based on the document type selected above. Required fields will be indicated in red on the form.
5. Click the **Import** icon to complete the import.



** Any donor correspondence document that should appear in TED must be imported via OnBase using the **UIF RECORDS – Correspondence, Donor Records** document type. Documents will not appear in TED until the nightly process runs to import them from OnBase into TED. Use UIF Support to request additional help with this process.

UPDATED 7/11/25

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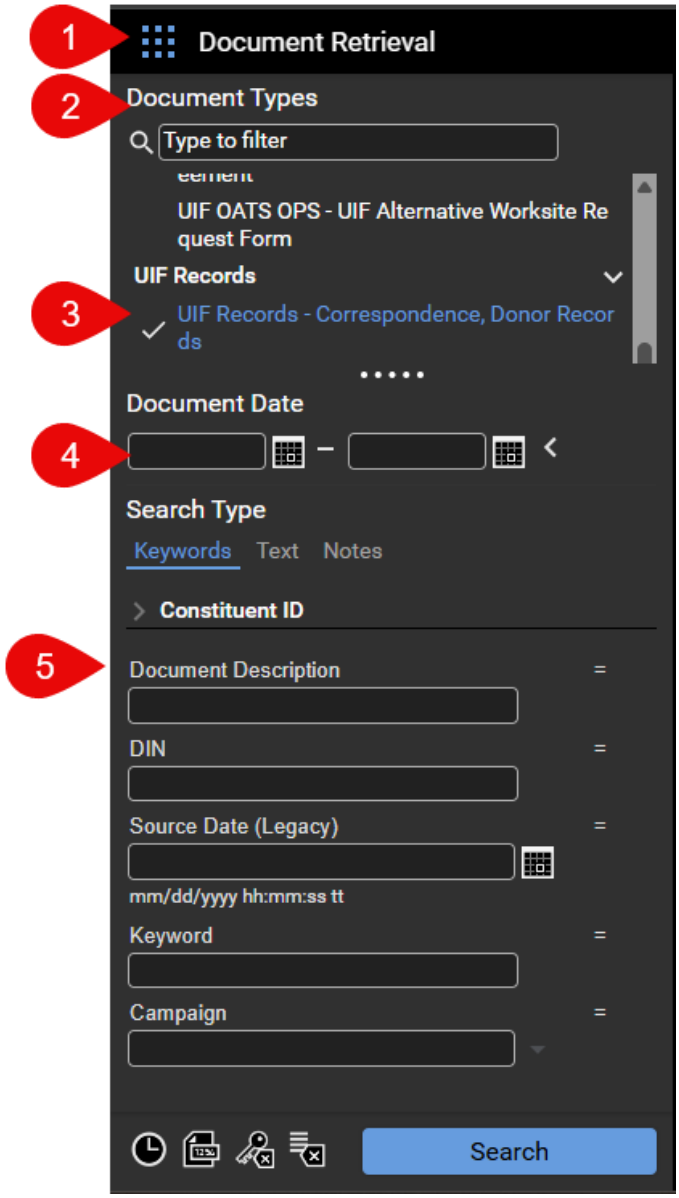
SEARCHING DOCUMENTS IN TED & ONBASE

There are two ways to find documents in the OnBase system; Document Retrieval or Custom Query.

Document Retrieval

1. After you login, the OnBase web client will open. In the drop-down option, select **Document Retrieval.**
2. You may limit the list of Document Types by using the **search field** in the Document Types area.
3. Select the document type(s) you want to search for from the **Document Types** area. Next, choose a Document Type(s). If you want to select multiple document types, hold down the **Shift** key as you select the first and last document type that you would like to search.
4. You may choose to limit your search by date range in the **From Date** and **To Date** fields. Dates must be entered in the following format: MM/DD/YYYY.
5. Enter Keywords to search for documents. Common keyword types used are **Constituent ID** and the **Document Description** fields. Use an * for wildcard searching (e.g. *Smith*).

   To submit your search, click the **Search** button.



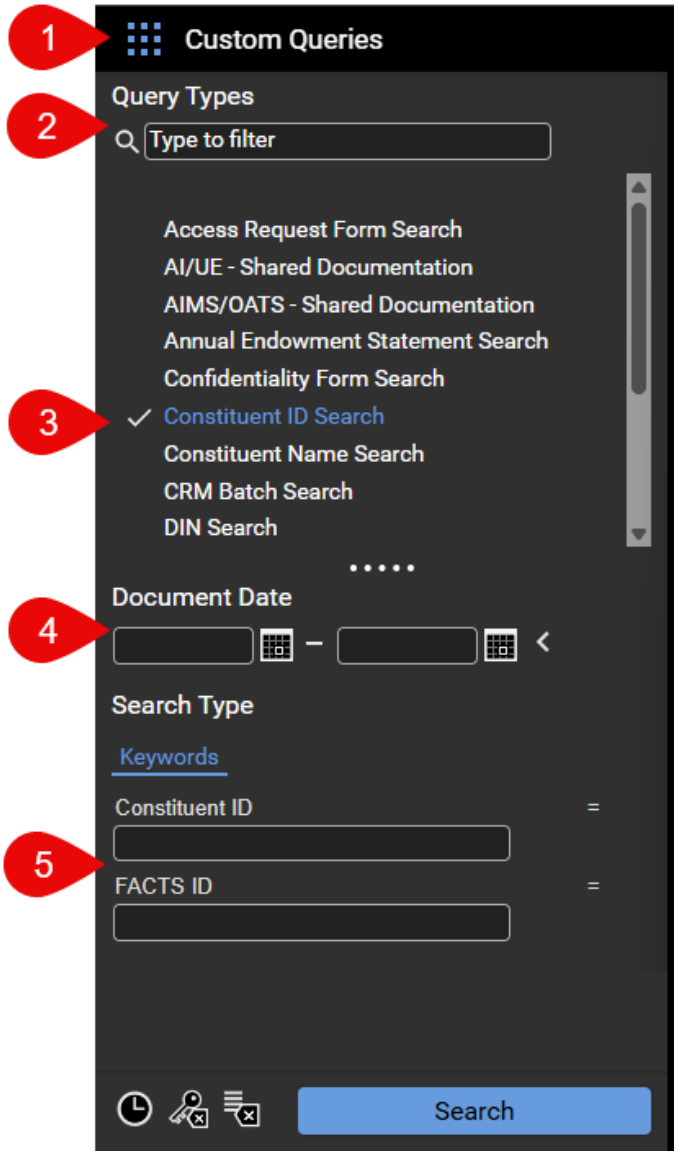
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Custom Query

1. After you login, the OnBase web client will open. In the drop-down menu, select **Custom Query.**
2. You can limit the list of options by using the **Query Types** area search field.
3. A list of Custom Queries search terms will automatically appear. Select the appropriate query type based on the document you are searching for. The field will automatically update with search options as new queries are chosen.
4. You may choose to limit your search by date range in the **From Date** and **To Date** fields. Dates must be entered in the following format: MM/DD/YYYY.
5. Enter **Keywords** to search for documents. When using the Constituent ID Search Query the window updates with a Constituent ID search field.

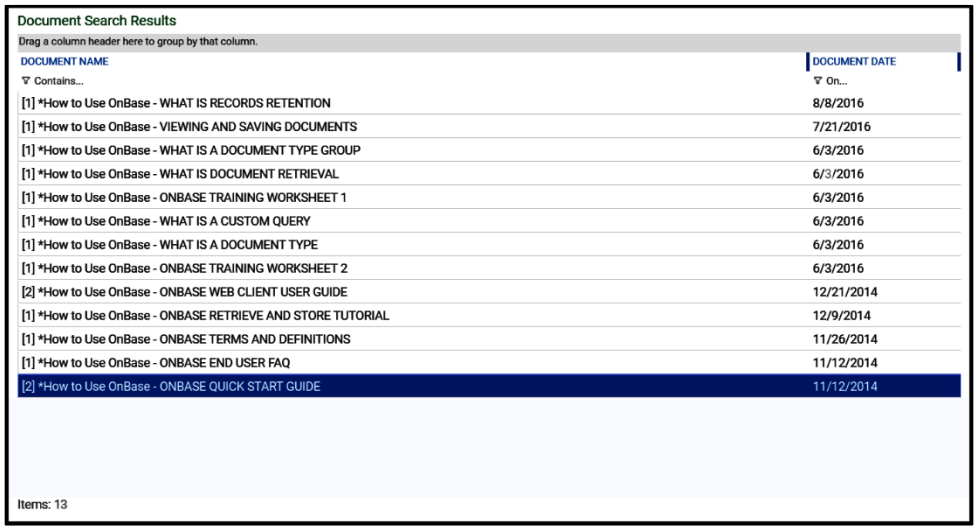
   To submit your search, click the **Search** button.



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Viewing a Retrieved Document

1. Whether you use **Document Retrieval** or **Custom Queries**, your search results will appear in the top windowpane.



2. **Double click the document** in the search results to open it. Many documents will preview onscreen inside of the OnBase window, and some documents will be downloaded locally to your computer.

3. To continue searching, click the **Clear All** icon to reset your search.



UPDATED 8/7/25

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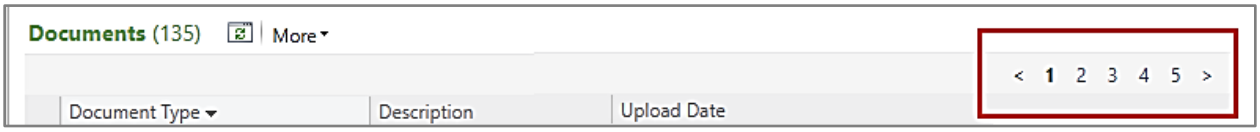
GOVERNING DOCUMENTS

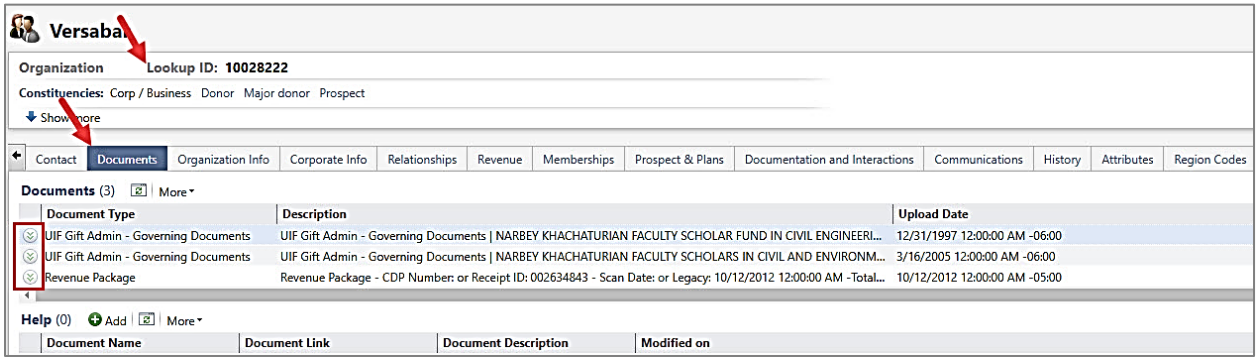
FINDING A CONSTITUENT'S GOVERNING DOCUMENTS IN TED

Governing documents are stored via the OnBase document system and are accessible from within the TED system. Additionally, you can find more information concerning the funds these documents govern via the FUND database on UIF Online.

TED Documents Tab

You can access a constituent's governing documents for a gift they have given through the **Documents** tab on their individual constituent record. From this tab look for the document types of Governing Documents. Depending on the number of documents on a constituent's record you may need to use the page numbers in the middle right corner of the screen.





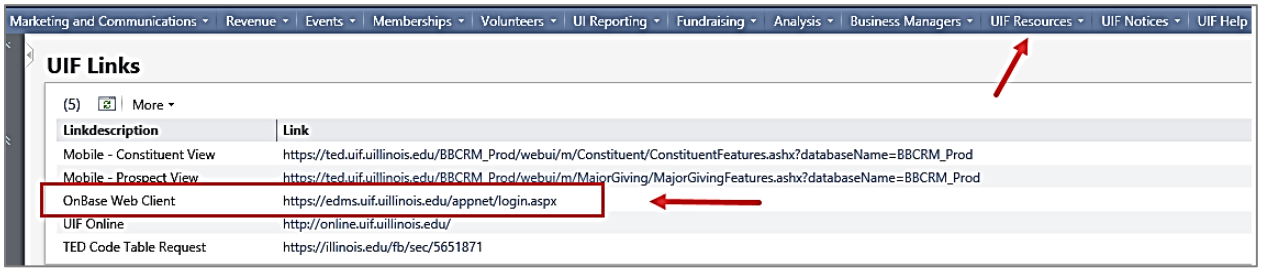
1. To view the document, begin by clicking the **double arrow** to expand the document's row information.
2. Once the document row has been expanded you can click the link to launch the document via the OnBase Doc-Pop window.

OnBase Web Client

Governing documents can also be accessed directly through the OnBase Web Client, which is accessible from the UIF Links area of the UIF Resources menu in TED.

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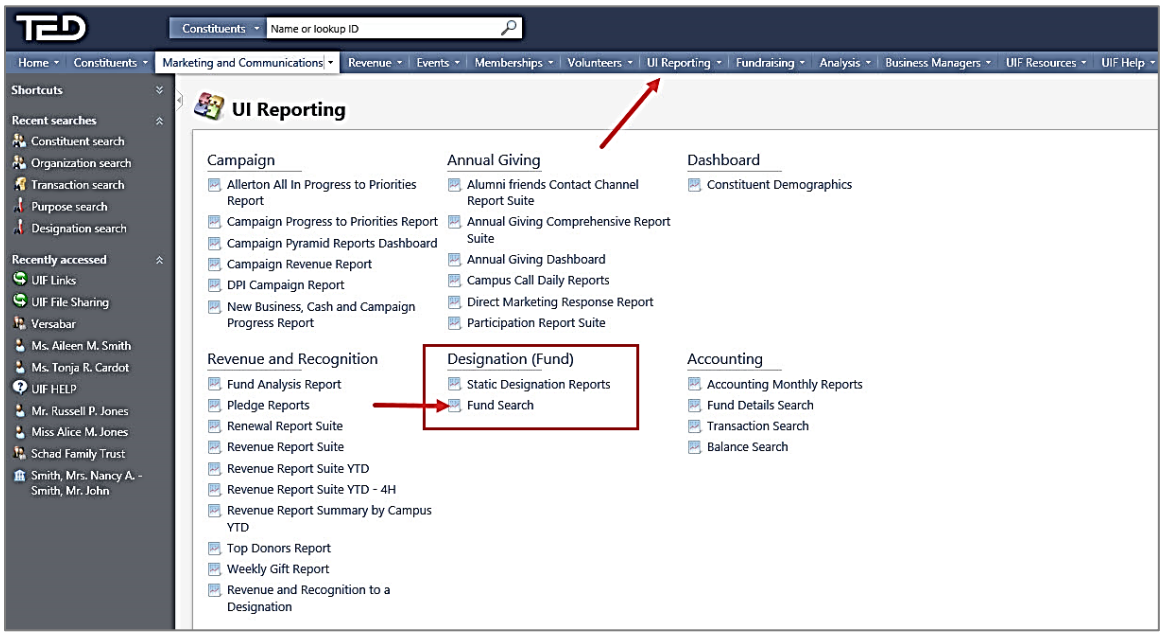
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Once you are logged in to the **OnBase Web Client** you can search by a constituent's name using the Custom Query feature to view all of their documents on file, which includes governing documents. See the Documents in TED and OnBase documentation for further information on using the Custom Query feature in OnBase.

FUND Database

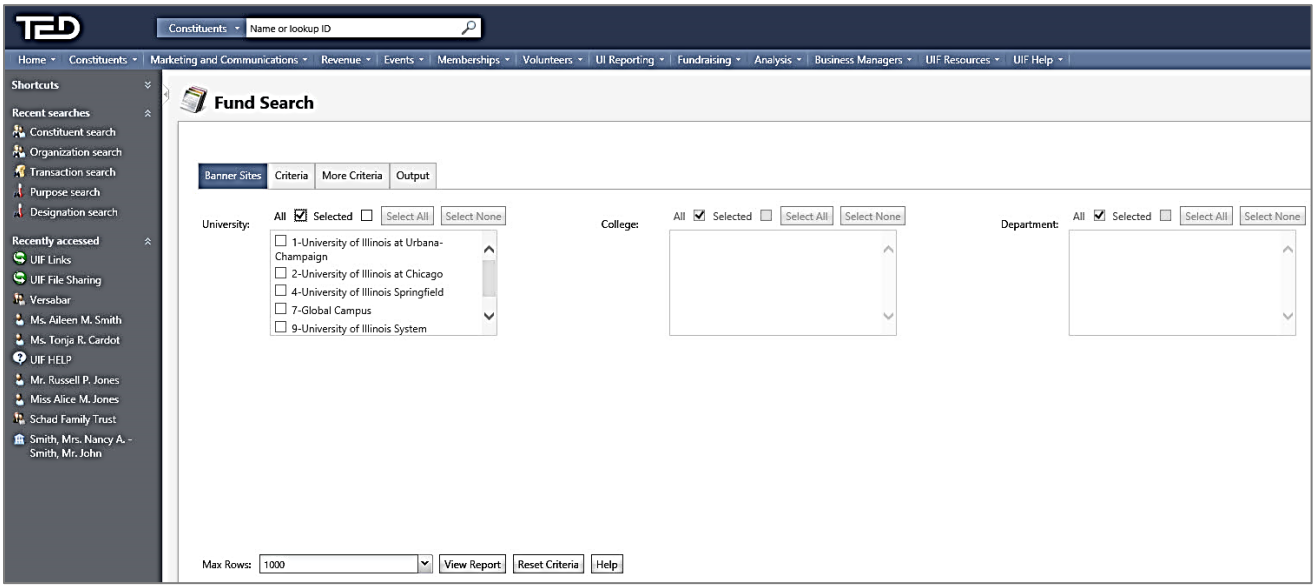
The link to the FUND Database can be found in TED rather than directly from UIF Online.



1. From the the UI Reporting menu, under Designation (Fund), click **Fund Search**. The following screen displays:

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Fund Database provides information related to fund balances and may contain some information related to governing documents.

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DOCUMENT TYPES IN TED

HIGH LEVEL OVERVIEW FROM ONBASE

The University of Illinois Foundation (UIF) stores electronic documents, pictures, videos, and sound recordings in OnBase by Hyland.

You can access OnBase on the web at https://edms.uif.uillinois.edu. You can access OnBase documents in TED through docpop links. These links appear on the documents or documentation tab of TED constituent, designation, and transaction records.

Good to Know -- Your ability to view, edit, and share documents is determined by your role with UIF and University Advancement.

You can add documents to your department's document types as well as these general document types, University Advancement - Biographies, University Advancement - Briefing Sheets, University Advancement – Business Cards, and UIF Records – Correspondence, Donor Records.

If you click on a document link in TED and receive the message, "document not found", know that this message may mean that the document is in OnBase, but you do not have permission to view the document. Each OnBase document type name begins with the department that sets its permissions. Contact records (UIFRecords@mx.uillinois.edu) to request access to a document.

Most OnBase users can view these document types.
UIAA Correspondence - Alumni Association member correspondence.

University Advancement – Biographies, University Advancement – Briefing Sheets, University Advancement – Business Cards

UIF Communications – Tributes, tributes to deceased Foundation and Presidents' Council Members. Tributes are written by UIF and presented to the families in honor of donors and friends of the University.

UIF Gift Administration – Governing Documents, Statements of Gift, Pledge Documentation and Annual Endowment Statements

UIF Research – Briefing Biography, Mini Biography, Research Biography, Briefing Sheets, and Standard Biography

UIF Records – Correspondence, Donor Records, general correspondence organized by constituent.

You may also see document types for colleges and university departments. We currently have document types for UIC Development, UIC JMLS, UIS Springfield, UIUC Library, ACES, AHS, Education, Gies, Grainger, iSchool, LAS, Law, LER, and Media.

Note! If your department is interested in adding documents to OnBase (with or without TED document links), contact Erin Miller, Advancement Content Librarian | Miller@uif.uillinois.edu | 217.300.6118

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Full list of OnBase Document Types that surface on constituent, designation, and transaction records in TED.

Document Type

UI Donor Relations - Event Invitations
UI Donor Relations - Event Photographs
UIAA - Correspondence
UIAA - Resumes - Public
UIC Advancement - Donor Stewardship Preferences
UIC Advancement - Gift Letters
UIC Advancement - Scholarship/Award Preferences
UIC Advancement - Stewardship Plan Documentation
UIC Advancement - Student Thank You Letters
UIF Cash Desk - Revenue Form
UIF Cash Desk - Revenue List
UIF Cash Desk - Revenue Package
UIF Cash Desk - Revenue Package - Adjustment Documentation
UIF Cash Desk - Revenue Package - Credit Card Documentation
UIF Cash Desk - Revenue Package - Cvent Documentation
UIF Cash Desk - Revenue Package - Recurring Updates
UIF Communications - Tributes
UIF Donor Relations - PC Correspondence
UIF Gift Admin - Annual Endowment Statements
UIF Gift Admin - Governing Documents
UIF Gift Admin - Governing Documents: Fund Agreements
UIF Gift Admin - Governing Documents: Gift Agreements
UIF Gift Admin - Governing Documents: Letter of Purpose
UIF Gift Admin - Governing Documents: Original Copy
UIF Gift Admin - Governing Documents: Pledge Agreements
UIF Gift Admin - Governing Documents: SOU
UIF Gift Admin - Governing Documents: Will/Trust
UIF Gift Admin - Grants (Inactive)
UIF Gift Admin - Matching Gift Program Correspondence
UIF Gift Admin - Matching Gift Revenue Documentation
UIF Gift Admin - Pledge Reminders
UIF Gift Admin - Pledge Statements
UIF Gift Admin - Pledges Files (Active)
UIF Gift Admin - Statement of Gift
UIF Gift Admin - Statement of Gift - Pledge
UIF Gift Admin - Statement of Intention
UIF Gift Processing - Event Documentation
UIF Principal Gifts - PGP Worksheets
UIF Records - Correspondence, Donor Records
UIF Records - UI Survey

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UIF Research - Briefing Sheets
UIF Research - Correspondence (Donor Research)
UIF Research - IPOs
UIF Research - Mini Biography
UIF Research - Research Biographies
UIF Research - Resumes - Public
UIS Advancement - Donor Stewardship Preferences
UIS Advancement - Scholarship Applications
UIS Advancement - Scholarship/Award Preferences
UIS Advancement - Stewardship Plan Documentation
UIUC Advancement - Donor Stewardship Preferences
UIUC Advancement - Stewardship Plan Documentation
UIUC College of ACES Advancement - Donor Files
UIUC College of Education Advancement - Award /Speaker Biographies
UIUC College of Education Advancement - Donor Files
UIUC College of Fine and Applied Arts Advancement - Donor Files
UIUC Grainger College of Engineering - Stewardship
UIUC LAS Advancement - Correspondence
UIUC LAS Advancement - School of Chemistry Impact Reports
UIUC LAS Advancement - Student Thank You Letters
UIUC Library Advancement - Donor Files
University Advancement - Biographies
University Advancement - Briefing Sheets
University Advancement - Business Cards

UPDATED 5/9/24

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EDUCATION TAB

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EDUCATION OVERVIEW

AND HOW EDUCATION DATA IS UPDATED IN TED

The Education tab on a constituent's record contains degree information on University of Illinois students and graduates. This data assists units with segmenting and targeting their prospect base. Units may also choose to store degree data from other institutions or high school information on a constituent record.

Additional education information can be stored in the Educational Involvement area for units that have this need. This area is for Information related to but not contained in the degree record. This data is maintained manually by units.

The Scholarships area shows UI scholarships received by the constituent that have been connected on the Recipients tab of the Purpose in TED. Non-UI scholarships or scholarships that cannot be connected on the Recipients tab of a Purpose can be housed in the Committees area of TED.

How Education Data Gets in TED

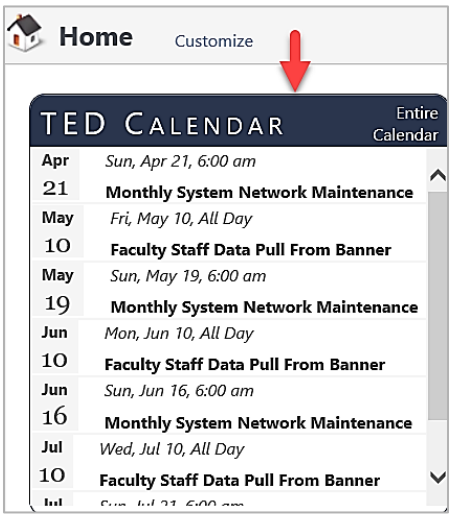
UI Education Data

University of Illinois graduates and current student data is imported into TED from Banner at intervals during the year for:

- University of Illinois at Chicago
- University of Illinois at Springfield
- University of Illinois at Urbana-Champaign

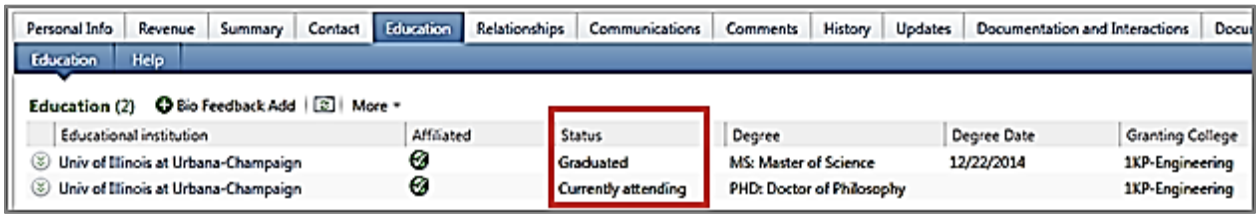
Education information and degree details originate in the Banner system and are maintained by the Office of the Registrar (Admissions and Records).

Graduate degree data is pulled from Banner three times a year (near or around Feb 1, July 1 and Sept 1). These dates will also show up on the Ted Homepage Calendar.



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The Education tab includes the status of the imported education data.



Current students - UI Student data for current enrollees is available to be imported into TED 10 days after each semester begins. Enrollment and degree information initiates from Banner and displays in TED with a status of ***Currently attending***.

Graduates – UI graduate data is available to be imported into TED 30 days after graduation. Graduation and degree information initiates from Banner and displays with a status of ***Graduated***.

Incomplete – UI enrollees who are not current students and did not complete graduation have a status of ***Incomplete***. Any changes to this status will be updated in the next load from Banner. Units that would like historical information loaded should submit a Bio Feedback Add request.

Unknown - Honorary Degrees are manually entered with a status of ***Unknown*** and can refer to University of Illinois Honorary Degrees or can be used to record honorary degrees from other institutions. Units that would like this information loaded should submit a Bio Feedback Add request.

Missing UI Education Data

Historically not all attendee records were loaded into the UI advancement database. If you find missing or incorrect University of Illinois education data, we encourage you to submit a Bio Feedback Add request. If a current UI student or graduate from your unit has missing or incorrect education record in TED, submit a Bio Feedback Add request. University of Illinois education data will be verified with the Office of the Registrar (Admissions and Records) before being posted in TED.

FERPA blocks may affect the data loaded into TED.

Transfer Students

TED does not indicate on the record that a student is a transfer.

University Laboratory High School

University Laboratory High School - Records are entered by UIF Data Management Records after graduation, and current students are entered the summer before the new school year.

Non-UI/High School Education Data

Non-UI Institutions - Education from other institutions can also be stored on a constituent's record and will display on the education tab. Units that would like this information loaded should submit a Bio Feedback Add request. Degrees from non-UI institutions are not vetted by UIF Data Management Records and are posted as submitted.

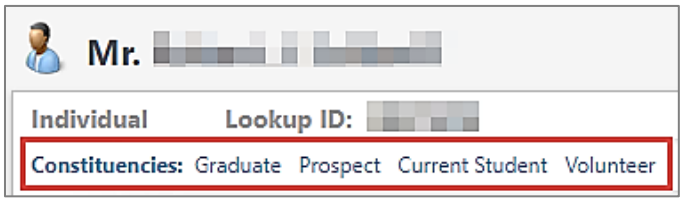
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High Schools - Education from other high schools can also be stored on a constituent's record and will display on the education tab. Units that would like this information loaded should submit a Bio Feedback Add request.

Education Constituencies

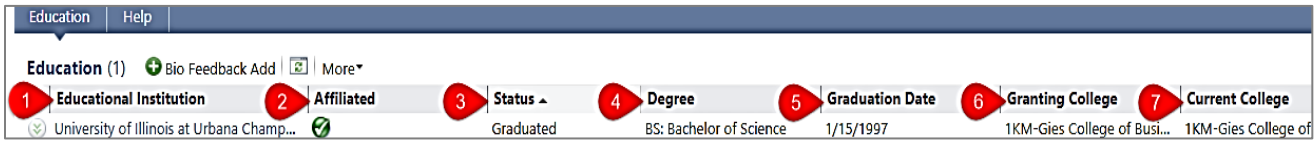
Some of the Education related constituencies are clickable links that will open the education tab. The clickable links are displayed in blue text, the non-clickable constituencies are black text.



The constituencies listed below are created or dependent on education records. See the complete constituency document for more constituency definitions.

Graduate	Added automatically when a status of "Graduated" from UIC, UIUC, UIS
Current Student	Added automatically when a status of "Currently Attending" for UIC, UIUC, UIS
Attendee	Added nightly when a status of "Incomplete" or "Unknown" at UIC, UIUC, UIS. Not applicable to UI Honorary Degrees.
Inactive Student	Added nightly when a status of "Incomplete" or "Unknown" and have not been enrolled in the last 2 years at UIC, UIUC, UIS. Not applicable to UI Honorary Degrees.
Uni Graduate	Added nightly when a status of "Graduated" and has an education record for University Laboratory High School at the University of Illinois.
Uni Attendee	Added nightly when a status of "Incomplete" and has an education record for University Laboratory High School at the University of Illinois.
Uni Current Student	Added nightly when a status of "Currently Attending" and has an education record for University Laboratory High School at the University of Illinois.
Parent of Current Student	Added nightly in a global change process after a parent/child relationship is created, where the child's status is Currently Attending one of the 3 affiliated educational institutions.
Parent of Former Student	Added nightly in a global change process after a parent/child relationship is created, where the child's status is Graduated, Incomplete, or Unknown at any of the three affiliated educational institutions.

Education Data Fields



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1. **Educational Institution**
    - Univ of Illinois at Chicago
    - Univ of Illinois at Springfield
    - Univ of Illinois at Urbana-Champaign
    - University Laboratory High School at the University of Illinois
    - Other universities or high schools can display here.

Click on the education institution to view more details about the education and degree. These details are outlined later in this document.

2. **Affiliated** – The green check mark appears next to any of the three of the University of Illinois institutions. University Laboratory High School and other institutions will be blank in the affiliated column.

3. **Status**
    - Currently Attending
    - Graduated
    - Incomplete
    - Unknown (used for Honorary Degrees, or can be used for non-UI Institutions)

UI records imported from Banner create a status of currently attending, graduated or incomplete. Non-UI education records submitted through a Bio Feedback Add request should use the most appropriate status that the user is aware of. Unknown can be used if the status is not certain.

4. **Degree** – The degree information on record in Banner. For non-UI institutions, the degree can be supplied on the Bio Feedback Add request if known but is not required.

5. **Graduation Date** – The graduation date on record in Banner. If the graduation date is incorrect in Banner, it will not appear correctly in TED. It must be fixed in Banner not TED. For non-UI institutions, the degree date can be supplied on the Bio Feedback Add request if known but is not required.

6. **Granting College** – The site and college name for this education record when the individual was a student.

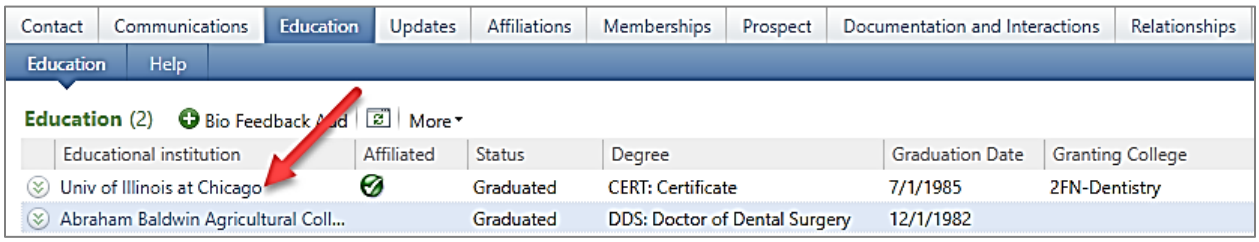
7. **Current College** – The current site and college name for this education record.

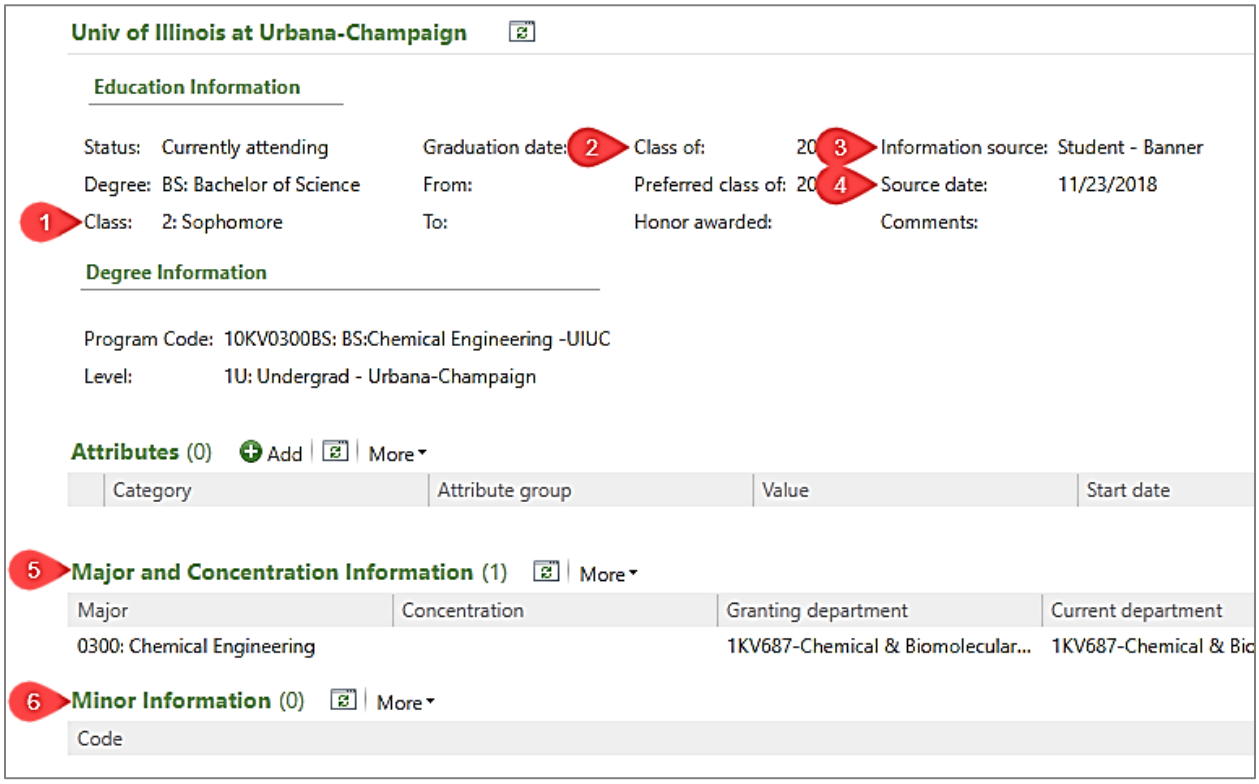
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Education Detail Data

To view additional details on an educational record, the blue Educational institution is a link that contains more details about the UI education record.





1. **Class** – Common entries are freshman, sophomore, junior, senior and Graduate. Some entries are specific to the program, such as Dentistry Yr 1. In Query, this field is called **Level** in the Education History table.
2. **Class of** – Expected graduation year.
3. **Information Source** – The most common source listed is Student – Banner, which indicates this came through the import from Banner. UI degrees are confirmed by Admissions and Records and will reflect this in the information source. For non-UI degree information, other sources are available to indicate where the information was obtained such as Internet Source, Questionnaire or Survey, and Verbal from Individual/Family.
4. **Source Date** – Indicates the date of import or manual entry.

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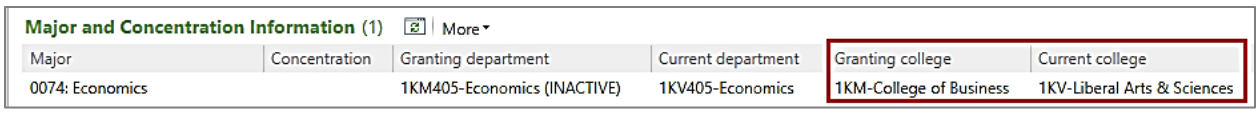
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5. **Major and Concentration Information** – Student or graduate program major from Banner. Useful for more specific segmentation.
6. **Minor Information** - Student or graduate program minor (if applicable) from Banner.

Granting College versus Current College

Occasionally majors/programs/departments move from one college to another. This change is reflected in the Granting College versus Current College fields (or Granting department versus Current department) on applicable detail education records. If the granting and current college or department are not the same on the record, this indicates that the unit is no longer in the college or department that it was in when the individual was a student.

An example is the Department of Economics (UIC & UIUC) which was formerly in the College of Business and is now in the College of Liberal Arts & Sciences.



Major and Concentration Information (1) More

Major	Concentration	Granting department	Current department	Granting college	Current college
0074: Economics		1KM405-Economics (INACTIVE)	1KV405-Economics	1KM-College of Business	1KV-Liberal Arts & Sciences

Uses of the fields will vary depending on the information needed by the unit.

Maybe you want to locate all graduates of a college using the granting college, College of Business (1KM). Or, you may want to invite all Economics graduates to a reception hosted by the College of Liberal Arts and Sciences (1KV), using the current college. Both fields are included on the constituent education record to allow for different uses by units for either a straight list of graduates or as contact lists (planned by UIF Engagement and programmed by UIF AI Segmentation).

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EDUCATIONAL INVOLVEMENT

SUPPLEMENTAL EDUCATION DATA

The educational involvement area can be used to store information not contained in the UI education record from Banner*. This data used in combination with the degree program code can assist units in segmenting and targeting their prospect base. Educational Involvement is optional and is maintained manually by units. For large amounts of data, a file can be submitted to UIF Advancement Information Management and Support (AIMS) group.

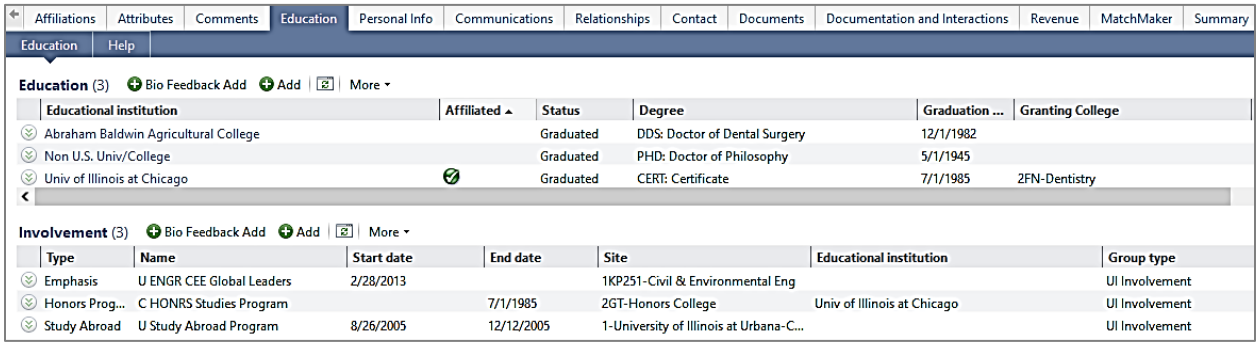
Some examples of Educational Involvement include –

- U ENG CEE uses emphasis to track areas of interest not contained in the degree record, such as Construction Materials.
- UIC School of Public Health (C SPH) tracks emphasis and divisions within the college for their graduates. This information is not included on the education record imported from Banner.
- The College of Nursing (C NURS) tracks the location where their students were educated. Historic education records did not contain this date. A studies program entry in the educational involvement area in combination with the program code from the degree record accomplishes this.
- UIS tracks students who did coursework in Peoria using a studies program entry, and a type of UIS Peoria Center.
- Other Certificates may be used for degrees not approved by IBHE (Illinois Board of Higher Education).

**Banner is the system used by the Office of the Registrar (Admissions and Records) that houses current and previous University of Illinois student information.*

Educational Involvement Display

Educational involvement is entered on a constituent's record displays on the education tab below the education area.



Educational Involvement Details

Type

These descriptions are to help identify which type is best suited for your unit's needs.

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Alternate Study	Educational Involvement "Alternative Study" data entries may or may not be associated with the student's/graduate's UI academic program of record.
Course	Educational Involvement "Course" data entries may or may not be associated with the student's/graduate's UI academic program of record.
Emphasis	Education Involvement "Emphasis" data entries are associated with the student's/graduate's UI academic program of record.
Exchange Student	Educational Involvement "Exchange Student" data entries can be used to identify someone from outside the USA who studies at the University of Illinois.
Honors Program	Education Involvement "Honors Program" data entries are associated with a student's/graduate's UI academic program of record and in some cases track academic information that is currently built into the Banner degree program code, but pre-banner was tracked separately.
Other Certificate	Education Involvement "Other Certificate" identifies a Non-Illinois Board of Higher Education (IBHE) certificate that does not come through the Banner Grad Transfer import process.
Student Type	Educational Involvement "Student Type" data entries, for segmentation purposes, can be used to track constituents at a level of detail not possible through the constituent's UI degree data. For instance, UI degree program codes, historically prior to Banner system, did not track online students.
Studies Program	Educational Involvement "Studies Program" data entries are associated with the student's/graduate's UI academic program of record and in some cases track academic information that is currently built into the Banner degree program code, but pre-banner was tracked separately. Honors Programs are categorized separately and should not be contained within "Studies Program."
Study Abroad	Educational Involvement "Study Abroad" data entries can be used to identify University of Illinois students who study in a country other than the USA.
Thesis/Dissertation Topic	Educational Involvement "Thesis/Dissertation Topic" can be used to identify Master's and Ph.D. thesis and dissertation project titles.

Name

After selecting a type, the name of the educational involvement will further identify the involvement. Educational involvement names include the advancement unit short name and description of the involvement. For segmentation purposes, these types can be used to track constituents at a level of detail not possible through the constituent's UI degree data.

Examples of Education Involvement names:

C SPH Environmental & Occupational Health Specialty
S CAST
U AHS I-LEAP Participant

If units would like to have an Educational Involvement Type and Name added or edited, submit a request using UIF Support and select Educational Involvement: CREATE as the Item under the Category 'Data Services' and Type 'I have a list/need an update'

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Description

The description field provides additional details about the involvement.

Group Type

Each Educational Involvement will be classified as either UI Involvement, or External Involvement. UI Involvement indicates that the involvement was affiliated with the individual's UI experience. External Involvement are ones affiliated with a college or university outside of UI.

Start and End Date

While start and end dates are not required fields, having accurate start and stop dates provides meaningful information on the education record. This could be the start date of an alternate study program, along with the date the program ends. Another example is the start and end date of a student's study abroad. If only one date is known (either start date or end date), it is best to include that date and leave the other date blank.

Suggested best practices for using dates include:

- Use start date for the date the program or event started (example - a student's Study Abroad experience begin in September 2017, use 9/1/17 for the start date).
- Use the end date to mark the end of the involvement. The end date for many programs should be the same as the degree date for the corresponding degree. This is especially true of studies programs.
- For data that was converted from the legacy database, only one date was available. Many times, this is the date the record was entered and is not a meaningful date. This caused some dates that are erroneous in TED and should be fixed as they are found.
- Studies programs that converted have had the start date removed, and the end date has been populated with the associated degree date.

Site

Each UI department's Banner Code is entered into TED as a Site. Educational Involvements with the Group Type of UI Involvement will have the corresponding unit's site listed. This allows for more robust reporting and tracking.

Educational Institution

This dropdown will display only institutions that are on the constituent record. In the case of multiple degree records (i.e., a BS from University of Illinois at Urbana-Champaign and Masters from University of Illinois at Chicago), both will be listed in the drop-down list of educational institutions and the correct one can be chosen. For educational involvement entries related to the education record, select the related institution.

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Program Code

While seldom used in the educational involvement area, this is the list of program codes that originate in Banner. This can also be seen by clicking on the UI degree.

Comments

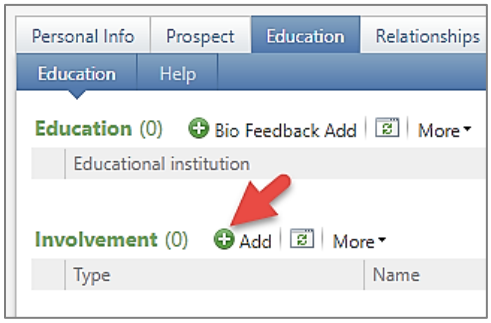
The Comments field should be used to further identify information not included under the involvement type. This can include the dissertation or thesis title, or concentration not listed in the degree code.

Specialties

A constituent's area of practice during his/her residency at any of the UI schools or colleges is added to the Specialties section of the Personal Info tab on the constituent's individual record. Specialties that have been added in the comments field should be deleted and a Bio Feedback request made to add the residency to the Specialties section.

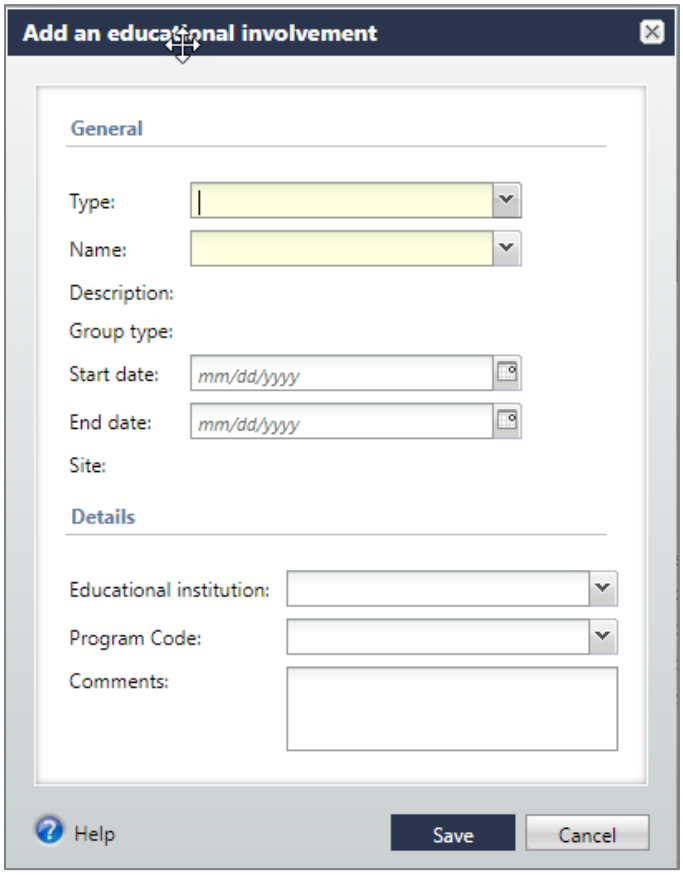
How Educational Involvement Data Gets in TED

Users with access can enter educational involvement directly from the education tab.



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There is a mass load process available to assist units with loading data. Units that would like to utilize this feature can submit an Excel or CSV file via ticket in UIF Support, and select Educational Involvement: UPDATE as the Item under the Category 'Data Services' and the Type 'I have a list/need an update' .

The file should include the following information:

Column A – Name (not used by mass update process, display only)
Column B – LookupID (Required)
Column C – AlternateLookupType (Required) i.e. TED, UIN, Paciolian
Column D – EducationalInvolvementType (Required)
Column E – EducationalInvolvementName (Required)
Column F – EducationalInvolvementStartDate (Optional)
Column G – EducationalInvolvementEndDate (Optional)
Column H – EducationalInvolvementComments (Optional)
Column I – EducationalInvolvementEducationalInstitution (Optional)
Column J – EducationalInvolvementProgramCode (Optional)

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Educational Involvement	
Types	Names
Alternative Study	
	U OTHR Illinois International Summer Research Lab
	U VMED Summer Research Training Program: Abbott
	U VMED Summer Research Training Program: Morris
	U VMED Summer Research Training Program: National Institutes for Health
	U VMED Summer Research Training Program: Pathobiology
	U VMED Summer Research Training Program: Pfizer
	U VMED Summer Research Training Program: State of Illinois
Course	
	C SAFFR Leadership Center Workshop
	S BMGT Accountancy CPA Review-Historical
	U BUSN Business 101 Section Leaders
	U BUSN Golder Finance Academy
	U BUSN Golder Investment Banking Academy
	U BUSN Golder Investment Management Academy
	U FAA Arch Continuing Education
	U FAA Discovery Dance 100
	U FAA JH Kimiko Gunji Student
	U FAA JH Shozo Sato Student
	U FAA JH Student
	U FAA JH Tankokai
	U SAFFR EDPSY 199 Section CP on Leadership
	U SAFFR Leadership
Emphasis	
	C CUPPA Transportation Emphasis
	C NURS Midwifery
	C NURS Occupational Health
	C NURS Women's Health
	C SPH Community Health Science Division
	C SPH Doctorate in Public Health Specialty
	C SPH Environmental & Occupational Health Specialty
	C SPH EOHS- Occupational Medicine Residency
	C SPH Epidemiology/Biostatistics Division

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	C SPH Health Informatics Program
	C SPH Health Policy & Administration Division
	C SPH Maternal and Child Health
	C SPH Maternal and Child Health Program Graduates

Educational Involvement

Types	Names
	C SPH Nonspecified
	U BUSN Technology & Management
	U ENGR CEE Construction Management
	U ENGR CEE Construction Materials
	U ENGR CEE Energy Water Environment Sustainability
	U ENGR CEE Environmental Engineering & Science
	U ENGR CEE Environmental Hydrology and Hydraulic Engineering
	U ENGR CEE Geotechnical Engineering
	U ENGR CEE Global Leaders
	U ENGR CEE Information Technology
	U ENGR CEE Societal Risk Management
	U ENGR CEE Structural Engineering
	U ENGR CEE Sustainable & Resilient Infrastructure Systems
	U ENGR CEE Transportation Engineering
	U ENGR CEE Water Resources Engineering and Science
	U ENGR CSL Circuits Group
	U ENGR CSL Decision & Control Group
	U ENGR CSL Grad Students
	U ENGR CSL Remote Sensing & Space Science
	U ENGR ECE BIBA Group
	U ENGR ECE Nanotechnology Group
	U ENGR ECE Power & Energy Systems
	U FAA Music Choral Alumni
	U FAA Music Percussion
	U LAS Biochemistry
	U LAS CDB Cell and Developmental Biology
	U LAS EEB Evolution, Ecology & Behavior
	U LAS Entomology
	U LAS Global Leaders
	U LAS MCB School of Molecular & Cellular Biology

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	U LAS Microbiology
	U LAS MIP Molecular & Integrative Physiology
	U LAS Plant Biology
	U LAS SIB School of Integrative Biology
	U MEDIA Cinema Studies
Exchange Student	
	C International Student
	U ACES Study Abroad Here

Educational Involvement

Types	Names
	U UNI Exchange Program
	UIUC Exchange Program
	United States: New London, CT
Honors Program	
	C CAMP James Scholars
	C HONRS GPPA Medicine
	C HONRS Studies Program
	C HONRS Studies Program Scholarship Association (Pre-Honors College)
	C MEDC James Scholars
	S CAMP CAP Scholars Honors
	U ACES Agriculture Honors Program
	U ACES James Scholars
	U AHS Physical Education Honors Program
	U BUSN Honors Program
	U BUSN James Scholars
	U CAMP Campus Honors Program
	U CAMP James Scholars
	U EDUC Education Honors Program
	U EDUC James Scholars
	U ENGR Honors Program
	U ENGR James Scholars
	U FAA Architecture Honors Program
	U FAA Honors Program
	U FAA James Scholars
	U FAA Music Honors Program
	U LAS Biology Honors Program
	U LAS English Honors Program

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	U LAS Honors Program
	U LAS Mathematics Honors Program
	U LAS Philosophy Honors Program
	U LAS Psychology Honors Program
	U MEDIA James Scholars
	U MEDIA Journalism Honors Program
Other Certificate	
	C AHS Health Information/Informatics
	C SAFFR UIC Experience
	CFA Certified Financial Analyst
	CPA Certified Public Accountant

Educational Involvement

Types	Names
	S EHS Teacher Education
	S PAE CAST
	U BUSN Accountancy Postbac Cert
	U BUSN Business Administration
	U INFOS Community Informatics
	U INFOS Data Curation
	U INFOS Special Collections
	U INFOS Youth Services
	U LAS Certificate in Neuroscience
	U OTHR Illinois International CELP Agricultural Bank of China
	U OTHR Illinois International CELP Export-Import Bank of China
	U OTHR Illinois International CELP Industrial and Commercial Bank
	U OTHR Illinois International CELP People's Bank of China
	U SAFFR Leadership
Student Type	
	C NURS International Alumnus
	Online Degree
	Online Student
	U BUSN Section Leader Business 101
Studies Program	
	C MEDC Health Humanities Program
	C MEDC Hispanic Center of Excellence
	C MEDC Medical Scientist Training Program

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	C MEDC The Urban Medicine Program
	C MEDP COM Peoria Rural Student Physicians Program (RSPP)
	C NURS Chicago
	C NURS Online
	C NURS Peoria
	C NURS Quad Cities
	C NURS Rockford
	C NURS Urbana
	C OTHR OGE Tutorium
	C SPH Education and Research Center Program
	C SPH Great Lakes Center
	C SPH Public Health Informatics
	C SPH Residency in Occupational Medicine
	C UIH Urban Health Program
	Galesburg Attendee

Educational Involvement

Types	Names
	Navy Pier
	U ACES Education
	U AHS Early Physical Education Degrees
	U AHS I-LEAP Participant
	U BUS EMBA Grads Prior to 1997
	U BUS MSBA-IM Program
	U EDUC Center for Study of Reading
	U FAA Music Ethnomusicology Program
	U INFOS Continuing Education Student
	U INFOS LEEP
	U LAS Access and Achievement Program (AAP)
	U LAS African American Studies
	U LAS American Indian Studies
	U LAS Asian American Studies
	U LAS Gender and Women's Studies
	U LAS Latina Latino Studies
	U LAS REEEC
	U MEDU 4-Year Clinical Program
	U MEDU Medical Scholars Program

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	U OTHR OVCRI Mayo Clinic and Illinois Alliance Program
	U SAFFR Illinois Leadership Center i-Program
	U SAFFR Illinois Leadership Center i-Program - FSAImprint
	U SAFFR Illinois Leadership Center i-Program - Imprint
	U SAFFR Illinois Leadership Center i-Program - Inclusion
	U SAFFR Illinois Leadership Center i-Program - Innovation
	U SAFFR Illinois Leadership Center i-Program - Insight
	U SAFFR Illinois Leadership Center i-Program - Integrity
	U SAFFR Illinois Leadership Center i-Program - Intersect
	UIS Peoria Center
	Urban Health Program
Study Abroad	
	C OTHR Study Abroad Program
	S PROV International Program
	S Study Abroad Student
	SAO: Study & Intern in South Africa
	U ACES International Education Experience
	U ACES Study Abroad
	U FAA Arch Study Abroad - Barcelona

Educational Involvement

Types	Names
	U FAA Arch Study Abroad - China
	U FAA Arch Study Abroad - Munich
	U FAA Arch Study Abroad - Versailles
	U FAA JH Study Abroad - Japan
	U LAS Barcelona, Spain
	U LAS Illinois in Paris
	U LAS Japan: Kobe
	U LAS Vienna Program
	U OTHR CHP Intercultural Study Tour - Japan
	U OTHR Yanai Ambassador
	U Study Abroad - Florence
	U Study Abroad - United Kingdom
	U Study Abroad Program
Thesis/Dissertation Topic	
	Dissertation
	Thesis

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	Thesis| Dissertation

UPDATED 2/28/24

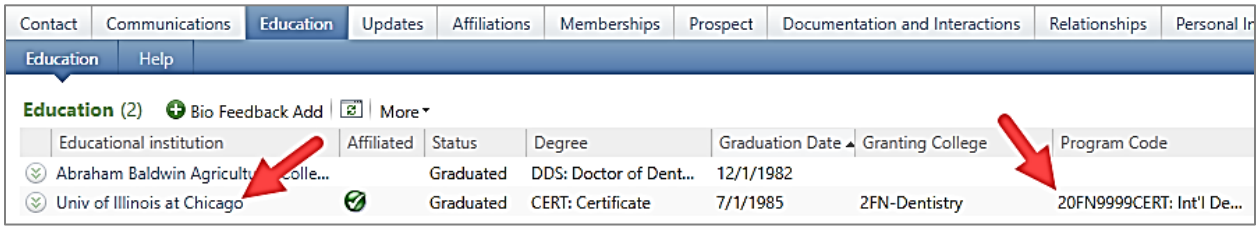
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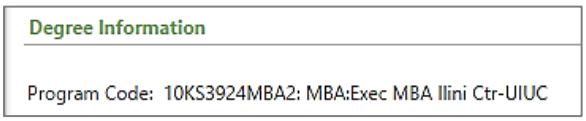
READING THE DEGREE PROGRAM CODE

DETAILS CONTAINED IN THE CODE

The Education tab on a constituent's record contains degree information on University of Illinois students and graduates. To view the degree program code and more details about the UI education record, click the educational institution or look at the program code column of the education subtab.



All UI degree information initiates from the Banner system. Each position of the 12-character code has a specific meaning and understanding the code can provide users with additional information about our current students and alumni.



Degree Program Code Format

This 12 digit unique identifier is usually the university, college, major and degree.

Position	Description
1-2	Designates University Level (10 UIUC, 20 UIC, 40 U
3-4	Designates College Level (site) For advanced degrees at UIC or UIUC, position 3-4 can designate the graduate college instead of the granting college. These codes are FS (UIC) or KS (UIUC).
5-8	Designates Major or Concentration
9-12	Degree
11-12 Sometimes used for special designations	J Contract K Cost Recovery X Extramural/NDEX Extramural Undergraduate U Online Q NDEQ – Tuition Differential 1 Urbana-Champaign 2 Chicago 4 Springfield 5 Peoria 6 Quad Cities 7 Rockford No Longer in use, but may be on historical records: C Cohort E Peoria F Rockford N Northbrook P Urbana-Champaign W Quad Cities I Illini Center

REVIEWED 7/26/24

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EVENTS TAB

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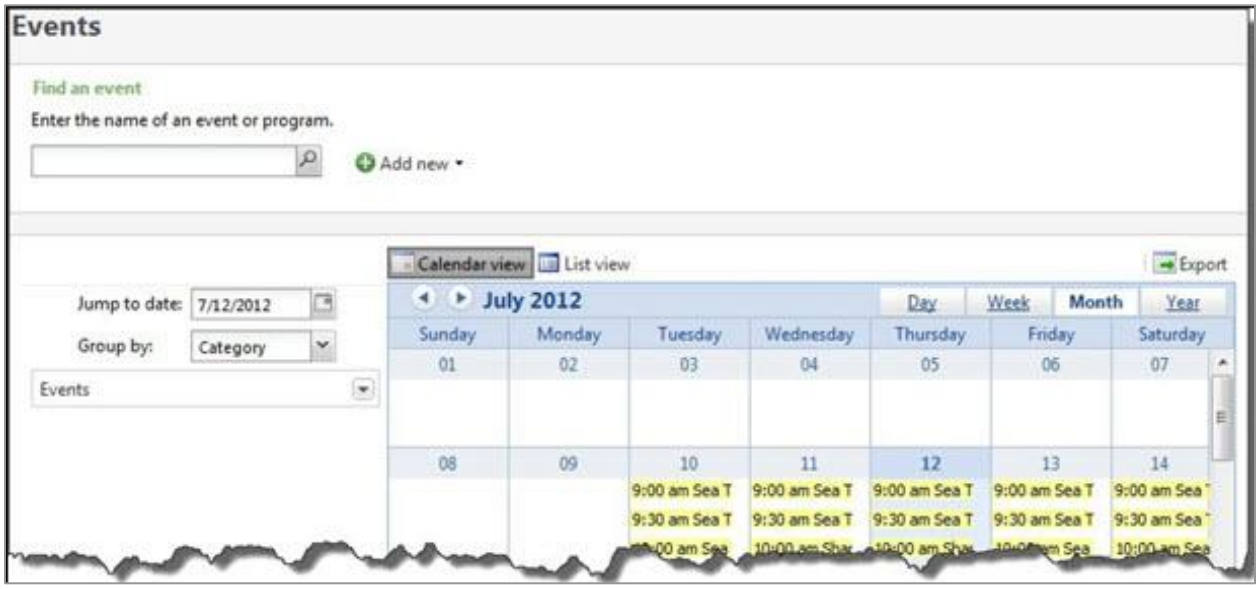
EVENTS IN TED

With *Events*, you can manage events for UI Advancement. You can set up one-time events such as galas, or multi-level events, such as a class reunion with both a welcome lunch and formal evening dinner.

In this guide, you learn how to set up single and multi-level events. You can also learn to manage registrant and guest information within the TED event module. This guide also covers how to view information about your events with event reports.

Full Circle View

From *Events*, you can configure your event options and settings, add and manage one-time and multi-level events, set up event seating, and run event reports. The Events page also provides a centralized location for you to search for events.



Event Setup

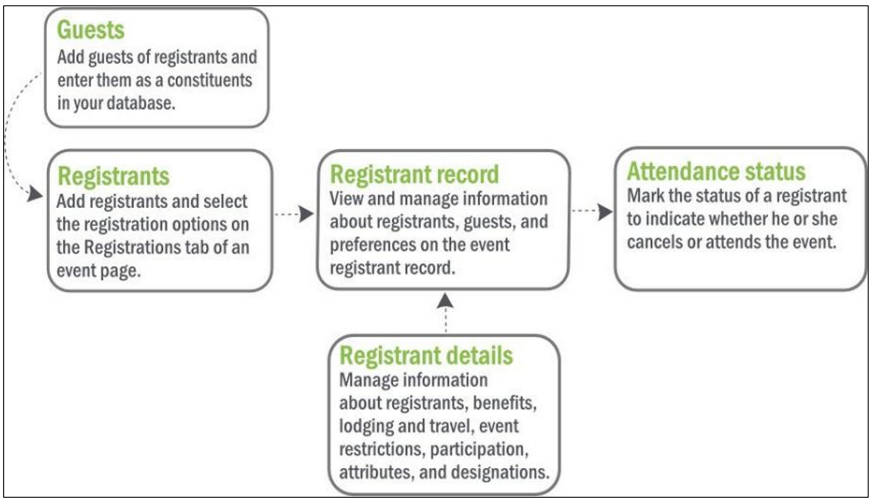
TED event administrators can record and track event detail information, add and manage events, coordinators, tasks, registration options, registrants and seating from an event record. There are two additional levels of TED event access. One can add and edit registrations and the other has view only access.

Event Registration

From the Registrations tab on the Events page, you can add and manage registrations for each event. On the event page, this tab allows you to view registrants and their guests along with information about attendance statuses.

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On the registrant record, you manage registrant details, including guest, registration, and preference information. When your event has many registrants, you can filter your registrant list by registrant, registrant status, attendance, or registrant type.

Event Seating

Before you can assign registrants and groups of registrants to seats, you must first configure the seating layouts for events. You can set up and name sections, tables, seats, and rows. You can also assign a registrant to a seat individually or you can assign groups to a section of seats. Finally, you can generate a seating summary to verify the arrangement.

Event Reports

You can run event reports to monitor event progress. For a comprehensive overview of your event, you can view the Event Profile report that contains information about the event's coordinators, location, seating, and more.

View the Event Summary report for information about the event that includes registration and attendance information. Compare the effectiveness of two different events with the Event Comparison report.

View the custom Event reports under UI Reporting, including the Event List Report Dashboard and the RSVP Name Tags report.

Finally, the Registration List Builder is available to customize and export current registration data. Available on the event registration tab, the Registration List Builder allows you to export **live** data with the option to customize the columns of information; this data includes custom data entered during the registration process (Preferences, Name Tag information, Seating Notes and Additional Notes).

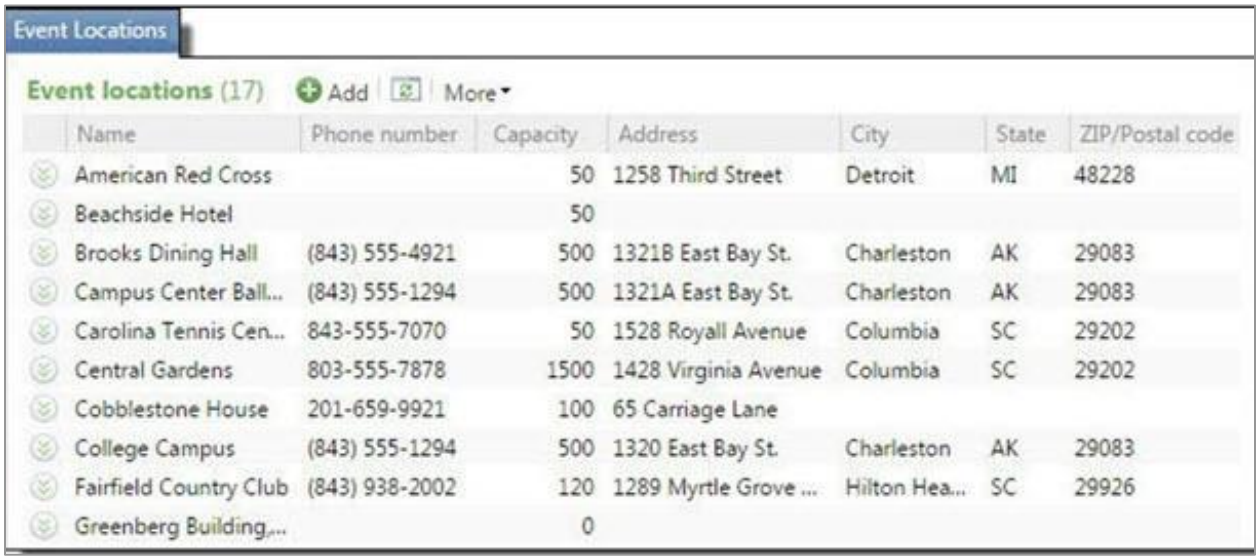
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EVENT LOCATIONS

When you add an event, you must select the location where the event occurs, such as a banquet hall.

On the Event Locations tab, you can view the venues where your organization holds events. For each location, you can view the name, phone number, capacity, and address.



Name	Phone number	Capacity	Address	City	State	ZIP/Postal code
American Red Cross		50	1258 Third Street	Detroit	MI	48228
Beachside Hotel		50				
Brooks Dining Hall	(843) 555-4921	500	1321B East Bay St.	Charleston	AK	29083
Campus Center Ball...	(843) 555-1294	500	1321A East Bay St.	Charleston	AK	29083
Carolina Tennis Cen...	843-555-7070	50	1528 Royall Avenue	Columbia	SC	29202
Central Gardens	803-555-7878	1500	1428 Virginia Avenue	Columbia	SC	29202
Cobblestone House	201-659-9921	100	65 Carriage Lane			
College Campus	(843) 555-1294	500	1320 East Bay St.	Charleston	AK	29083
Fairfield Country Club	(843) 938-2002	120	1289 Myrtle Grove ...	Hilton Hea...	SC	29926
Greenberg Building,...		0				

Add Event Locations

When you host an event, you must select a venue where the event occurs, such as a banquet hall or sports facility. When you add an event location, you can enter information about its address, contact, and capacity. After you add a location, it appears in search results when users select locations for events. Event locations are requested by submitting a ticket to have the location added. To submit a ticket, click on UIF Help from the main TED toolbar, then click the link for Advancement Support – Submit a Request and then login to UIF Support to complete the form for your request.

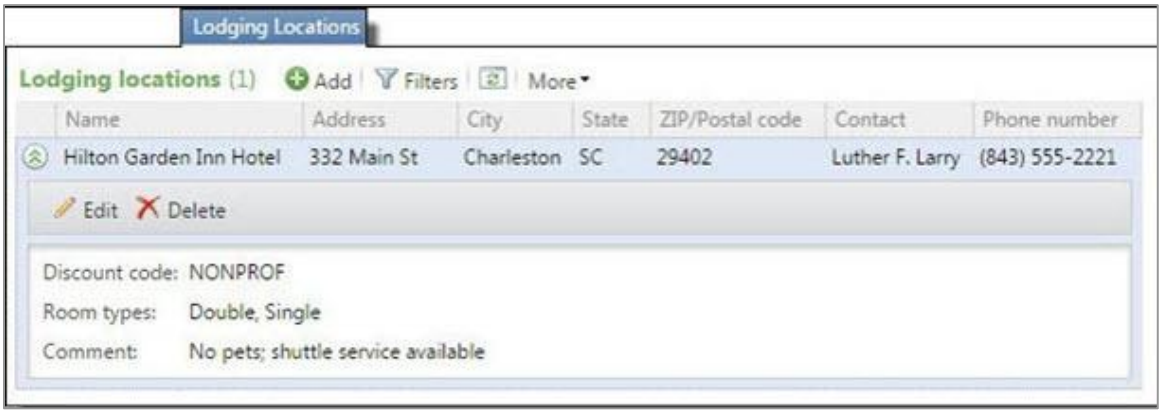
Larger event venues may have rooms or other distinct units within them. For example, a convention center may have 20 meeting rooms, and a hotel may have a restaurant, atrium, and rooftop lounge. You can add rooms when you submit your ticket to add a location.

Lodging Locations

On the Lodging Locations tab, you can view the facilities where your registrants stay when they travel to events. For each location, you can view the name, phone number, address, and contact. You can also view any comments about the lodging location. This is not a commonly used TED functionality.

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1. To filter the lodging locations in the grid, click **Filter**, enter the name or city, and click **Apply**. To remove the filter and display all locations, click **Reset**.

2. To view detailed information about a lodging location, select it in the grid and click **Show Details**. The **Details** window displays the discount code, room types, and comments about the location.

   From the grid, you can add and manage lodging locations.

Add Lodging Location

You may have registrants who travel to your event and require lodging facilities such as hotels or motels. Your organization may also provide on-site lodging accommodations for registrants and guests. To add a lodging location, submit a ticket to have it added; you can include the location's address and contact information. To submit a ticket, click on UIF Help from the main TED toolbar, then click the link for Advancement Support – Submit a Request and then login to UIF Support to complete the form for your request.

Registration Options

When you define registration options for an event, you select a registration type for each option to indicate the number of associated registrations and the registrants' level of participation in the event. For example, you may create a registration type of "Individual/Individual and Guest" with a registration count of two.

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Registration type	Name	Registration fee	Receipt amount	Registration count
Board Member	Board Member	$0.00	$0.00	1
Board Member and Guest	Board Member and Guest	$0.00	$0.00	2
Individual	Individual	$0.00	$0.00	1
Individual and Guest	Individual and Guest	$0.00	$0.00	1
Staff	Staff	$0.00	$0.00	1

Under **Event registration options**, the registration types appear. For each registration type, you can view its description, status, and registration count (the number of registrations associated with that particular registration type). To add a new registration type to the list available, you must submit a ticket. To submit a ticket, click on UIF Help from the main TED toolbar, then click the link for Advancement Support – Submit a Request and then login to UIF Support to complete the form for your request.

Event Restriction Types

When you register constituents for events, you can add restriction types to track personal restrictions or preferences such as dietary or physical needs. To have a new restriction added to the current list of options, you must submit a ticket. To submit a ticket, click on UIF Help from the main TED toolbar, then click the link for Advancement Support – Submit a Request and then login to UIF Support to complete the form for your request.

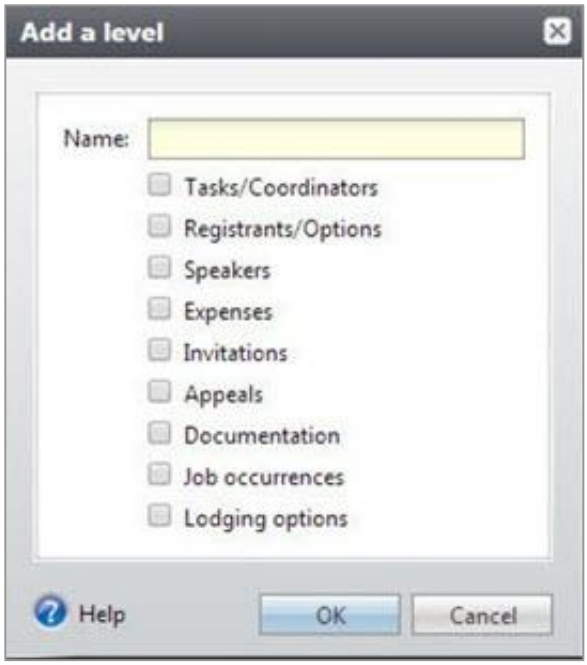
Event Management Templates

Some events are tiered and have multiple tiers or levels. You can set up templates for the multi-level events. The templates determine whether events at levels or tiers can have registrants, speakers, lodging options, and more.

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Note: The event name appears at the top of the record and is followed by the name of the level from the template. For example, if "2011 Conference Keynote" is the name of the event and "Conference Sessions" is the name of the level from the multi-level event template, the record will display "2011 Conference Keynote - Conference Sessions."



1. Enter a name for the level or tier of events. You can select the options for events at this level, such as whether the events have registrants, speakers, lodging options, and more. These are the default options for events at this level. However, you can override these options for a single event.

2. Click **Save**. You return to the event template. To re-order the event levels, use the arrow buttons.

TED EVENT SETUP

With *Events*, you can manage Advancement events. Whether you are arranging an alumni awards banquet, a donor luncheon, or alumni homecoming activities, you can record and track the information in TED.

Event Setup Checklist

Setting up events requires several steps.

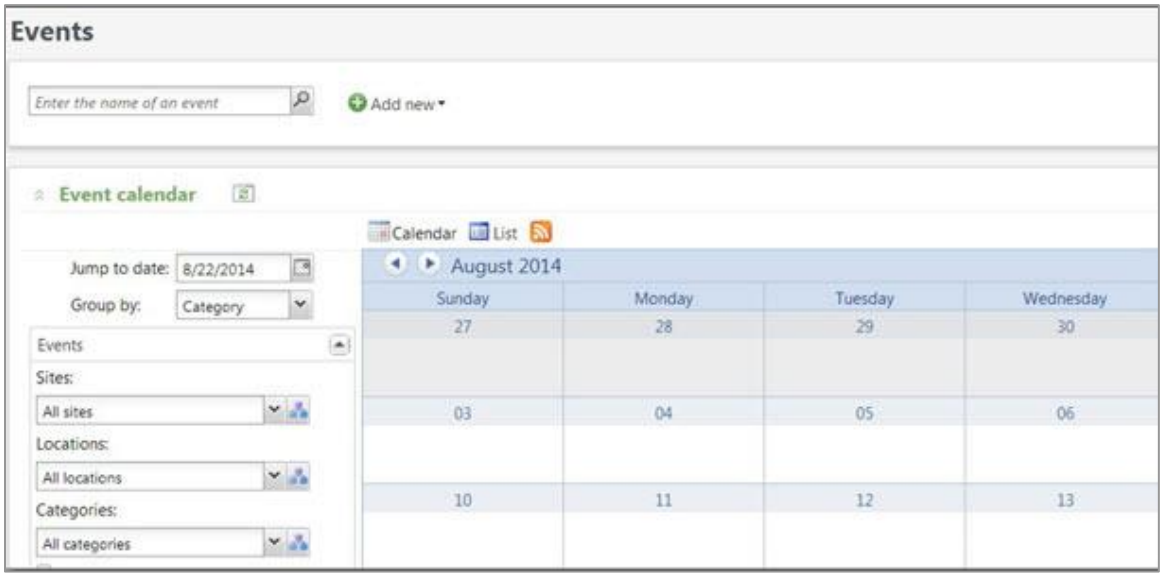
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- Add event locations.
- Add registration types.
- Add an event.
- Add supporting events if the event is comprised of multiple events grouped together.
- Add event coordinators.
- Add event tasks.
- Add registration options.
- Add an invitee list and add invitation processes.
- Add registrants and preference information.
- Add event seating.

Events Page

This centralized events page provides a search field for all event types, along with calendar and list views of your events. It enables you to add events, search for events, and run event reports. You can also edit and delete event information from this page. Click *Events* to access this page from the main TED menu bar.



To search for an event in the calendar, choose Category or Location in the **Group by** box to look at event times and dates to filter events. Filters enable you to view only the event category and location attributes that interest your organization. Use the checkboxes to determine what is displayed on the list. Event categories and locations are identified by color. You can collapse and expand the calendar.

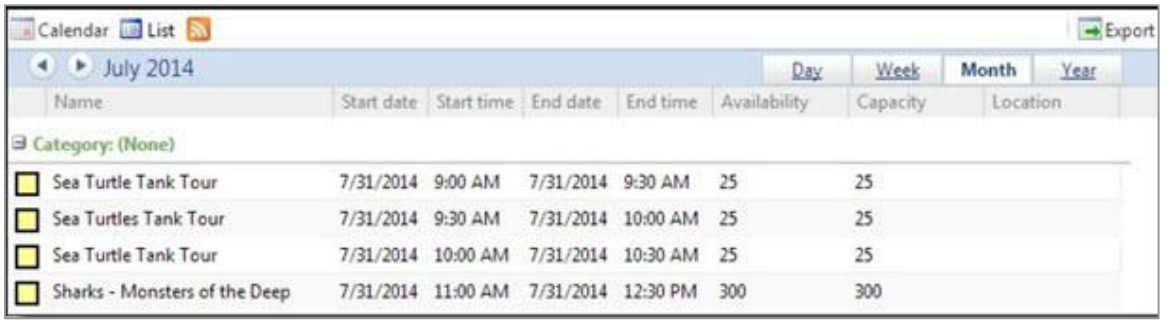
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You can use the calendar view to see event time and date information. To access the calendar view, click the down arrows beside **Event calendar**. View the events calendar by day, week, month or year. To edit or delete information for an event, right-click the event. When you select **Edit**, the Edit event screen appears, and you can edit details such as schedule and location information. Click **Go to event** to access the event record.



You can use the list view to view event time and date information, if you prefer to view event information in a list format rather than on a calendar. Each category of event is associated with a color that is shown at the left of the event name. To access the list view, click **List**. To edit or delete information for an event, right-click the event.



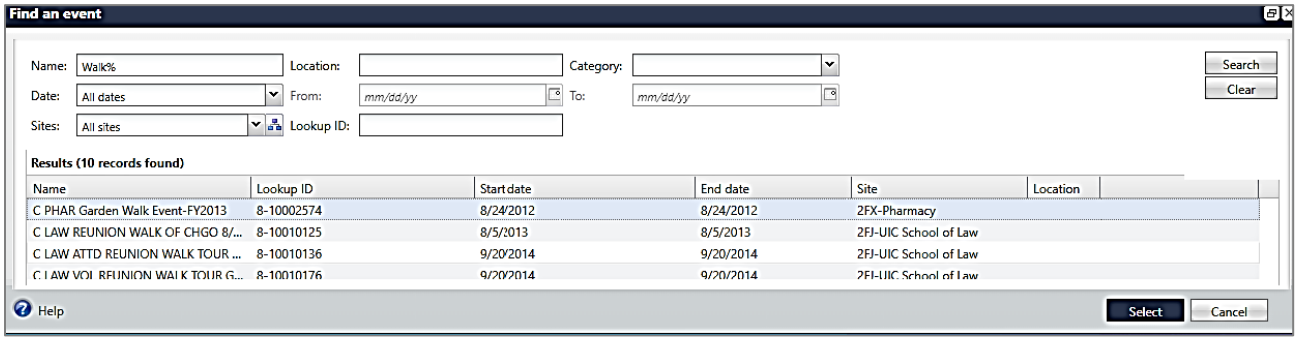
Note: The list displays a maximum of 50 items per date. If there are more items, additional pages will open.

Find an Event

From the Events page, you can search for events. Enter the name of the event in the search field and click the search button. The Find an event screen appears.

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You can enter search criteria including the event's lookup ID, location, category, sites, and dates.

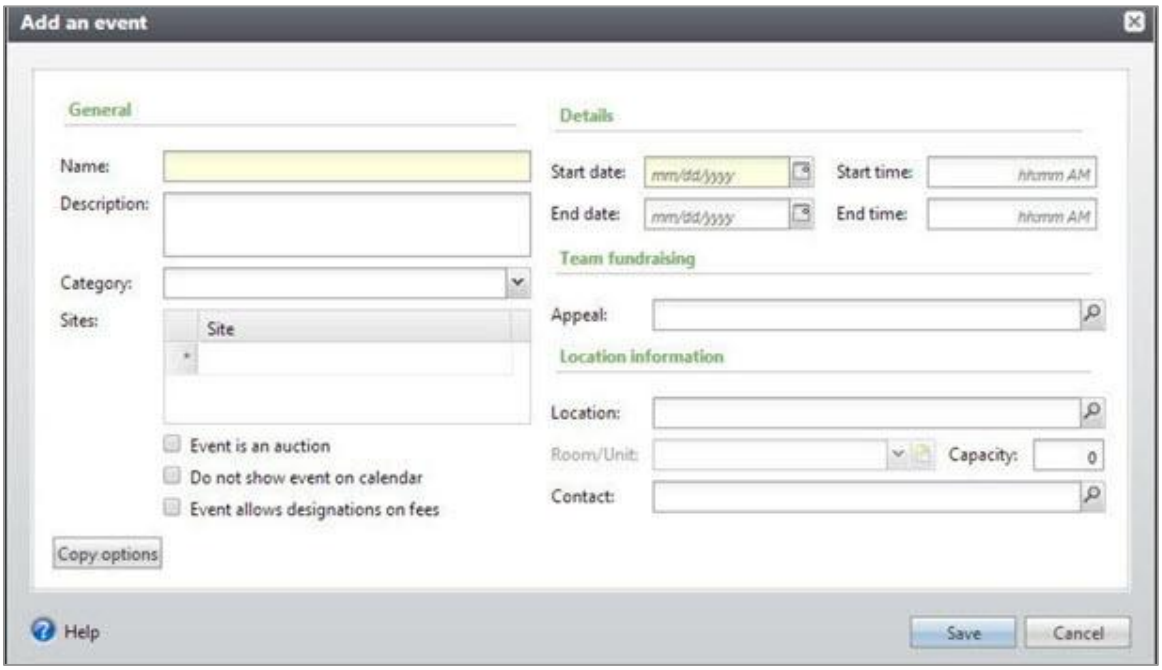
Click **Search** to find events that meet your criteria. Those events appear in the search grid. When you select an event from the results, its record opens.

ADD EVENTS

When you add a new event to your database, you can enter a description of the event, start and end time and dates, capacity, and location information.

Add an event

1. From *Events*, click **Add new** and select the event type.



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2. Under **General**, enter a unique name and description to identify the event. Be sure to use our naming convention rules and identify your campus within the Event Name. UIC events should begin with C, UIS events begin with S, Urbana events begin with U,UIF events begin with UIF. For example, a UIC event may be named, “C Alumni Basketball Reunion”. The description field is a great place to identify your invitation criteria and provide a one sentence summary of the event.
3. To further define the event, in the **Category** field, select the type of event, such as Banquet or Sporting event. UIF configures the categories that appear.
4. To identify the hosting unit of the event and to aid in searching for events, under **Sites**, select the sites to use the event.
5. When you select **Do not show event on calendar**, the event will not be displayed on the event calendar view. This is sometimes used if you are working on an event, but not yet ready for it be widely known.
6. When you select **Event allows designations on fees,** you can apply fees to designations. You can select the designations on the Designations tab of the event record**. Note: This functionality is not yet available as we do not yet link revenue and events.**
7. Under **Details**, enter the start and end date and times of the event.
8. Under **Location information**, search for and select the location where your organization hosts the event.
9. In the **Room/Unit** field, select the room or unit at the selected location used for the event. To add a new room to the location, click **Add.**
10. In the **Capacity** field, enter the total number of attendees the event can accommodate.

Tip: The program tracks the event capacity with the number of registrations received for the event. While the event capacity does not have to match the location capacity, we recommend you not exceed the location capacity.

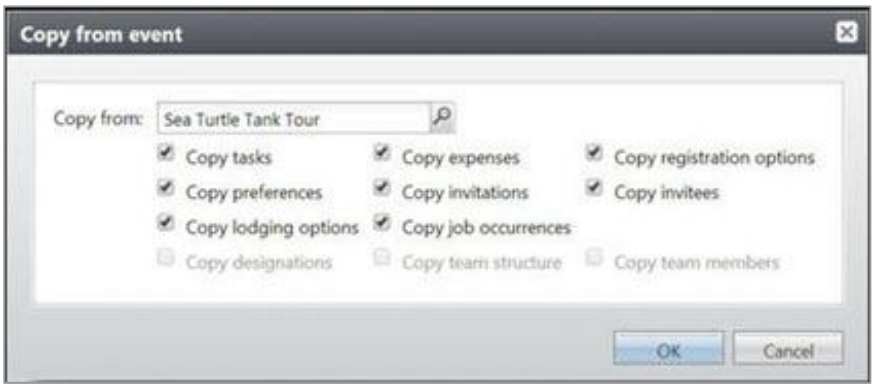
11. In the **Contact** field, search for and select the individual constituent who serves as a contact for the event location. **Note: This is not the unit event planner, but the actual contact at the venue.**
12. If the event is like another event, for example an event you hold each year, you may copy the select settings from the other event.

Note: When you add a multi-level event, the event options are determined by the event management template; the **Copy options** button will not appear.

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a. Click **Copy options**. The Copy from event screen appears.



b. In the **Copy from** field, search for and select the event from which to copy settings.
c. Select the settings to copy from the original event such as tasks and expenses.
d. Click **OK.** You return to the Add an event screen.

13. Click **Save**. The record of the new event appears.
14. Go into the event and click on the **Task/Coordinators** tab.
    a. Click **Add**.
    b. Search for the event planner who is responsible for this event and click **Select**. They must have a staff constituency on their TED record to be able to be selected for this field.
    c. Click **Save.**
15. Click on the **Options** tab so that you can add your required registration types to the event. You must complete this step in order to register guests for your event.
    a. Click **Add.**
    b. Select the correct **Registration Type** for your event.
    c. Click **Save.**
    d. Add as many registration types for your event as you need. The most common registration types used are “Individual” and “Individual and Guest”.

Add an Event Screen

The table below explains the items on the Add an event screen.

Screen Item	Description
Name	Enter a name to identify the event
Description	To further identify the event, enter a detailed description of the event.

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Category	To define the event, select the category for the event such as Reception or Sporting event.
Sites	If this event belongs to a site or multiple sites within your organization, select the applicable sites. Administrators can configure access to event information based on site. If your organization uses multiple sites, or if multiple sites are used for this event, you can filter events by site when you search for an event.
Do not show event on Calendar	When you select this checkbox, the event will not be displayed on the event calendar.
Start date and **End date**	Enter the dates the event begins and ends. The start and end dates can be the same date.
Start time and End time	Enter the time the event begins and ends. Event times are not required.
Location	Search for and select the location where the event takes place.
Room/Unit	Select the room at the location of the event. To add a new room to the location, click **Add**.
Capacity	Enter the number of attendees the event can accommodate. This number does not have to be the same as the location capacity but should not exceed location capacity. The program tracks this capacity with the number of registrations for the event.
Contact	Search for and select the individual constituent who serves as a contact for the event location.
Copy options	To copy the settings from a similar event in the database, click this button. On the Copy from event screen, search for and select the event from which to copy settings and select which options, such as tasks and registration options, to copy from the event.

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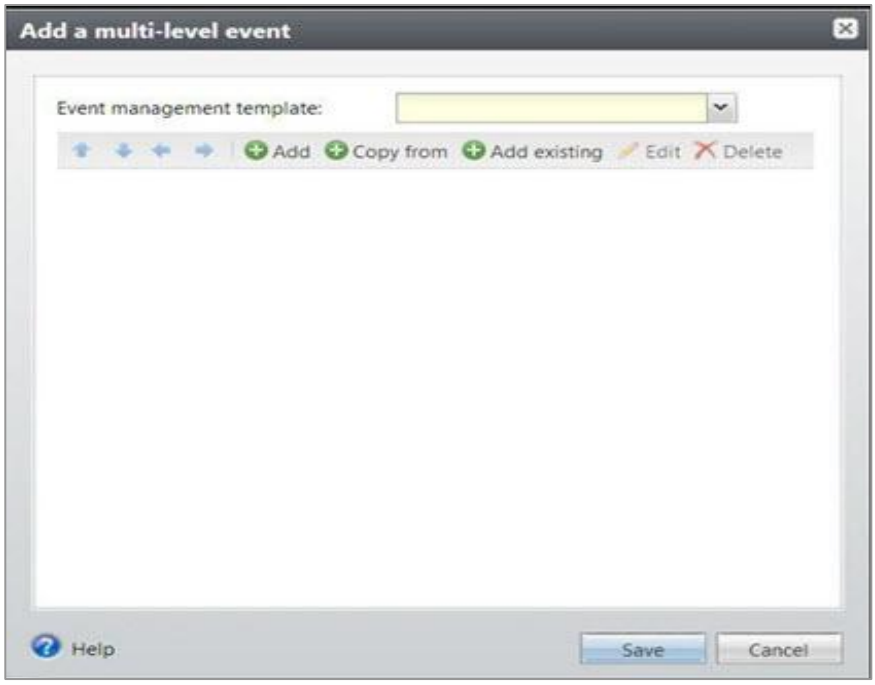
Note: If you are adding a multi-level event, the event options are determined by the event management template; the **Copy options** button will not appear.

ADD MULTI-LEVEL EVENTS

If your organization hosts many multi-level or tiered events, you can set up multi-level event templates to streamline data entry. When you add a multi-level event, you can select the template to use and can add the events.

Add a multi-level event

1. From *Events*, click **Add new** and select multi-level event. The Add a multi-level event screen



appears.

2. Select No Template when prompted to choose which multi-level event template to use.

3. To add a supporting event, click **Add**. The Add an event screen appears. You can also edit or delete supporting events.

4. As you add events, you can use the arrows to show the hierarchical levels or tiers of events

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and how the supporting events are related.

5. Click **Save**. The record of the new event appears.

Note: The event name appears at the top of the record and is followed by the name of the level from the template. For example, if "2011 Conference Keynote" is the name of the event and "Conference Sessions" is the name of the level from the multi-level event template, the record will display "2011 Conference Keynote - Conference Sessions."

Add a Multi-level Event Screen

Screen Item	Description
Multi-level event template	If your organization hosts many multi-level or tiered events, you can set up multi-level event templates to streamline data entry. When you add a multi-level event, you can select the template to use and can add the events.
Arrows	Use the arrows to show the hierarchical levels or tiers of events and how the supporting events are related.
Add, Edit, and **Delete**	After you select the multi-level event template, you can add supporting events. The templates determine whether events at levels or tiers can have registrants, speakers, lodging options, and more. **Note:** When you convert an individual event to a multi-level event, the individual event becomes the top tier event.

Add Existing Events to Multi-level Events

When you create multi-level events, you can include a single event you have already created. From the Add a multi-level event screen or from the event hierarchy, click **Add**, **Existing event**. Select the existing event and click **Save**. The event is part of the multi-level event and is displayed in the hierarchy.

MULTI-LEVEL EVENT HIERARCHY

When an event is part of a multi-level hierarchy, you can view the event hierarchy from the individual events. From an event, click **Event hierarchy** on the right edge of the page. The Event hierarchy view appears. You can use this view to move between events in the hierarchy.

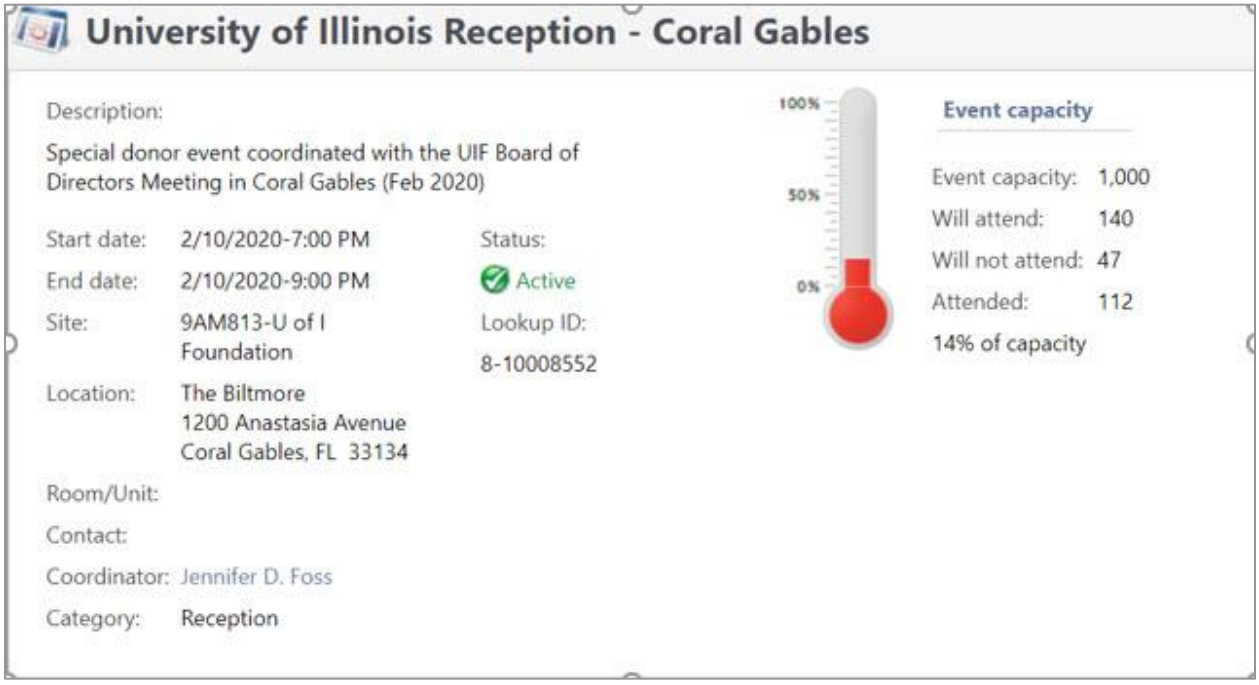
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Note: Events with supporting events cannot be deleted.

EVENT RECORD

The event record displays tabs with information about tasks, registrants, location information, coordinators, and notes for an event. You can add, edit, and delete information from these tabs.



You can mark events active or inactive under **Tasks** on the explorer bar. You can refresh the screen to make sure you have the latest information.

Event Capacity Thermometer

In the summary area of the event page, you can use the event capacity thermometer to view capacity information. The event capacity thermometer compares the event capacity and the number of registrants so far. The result appears as a percentage and as a visual representation on the thermometer.

Note: If this is a multi-level event, you can click **Include sub-events** to view event expenses and capacity information for the event and the sub-events. Click **Only this event** to switch the summary view back to the event only.

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Edit Events

After you add an event, you can edit details for the event. From the Event Search screen, you can select an event to edit.

Edit an event

1. Use the Event Search screen to select the event to edit. The event page appears.
2. Click **Edit event**, under **Tasks** on the explorer bar. The Edit event screen appears.
3. Make changes to the event information. The items on this screen are identical to those on the Add event screen.
4. To save your changes, click **Save**.

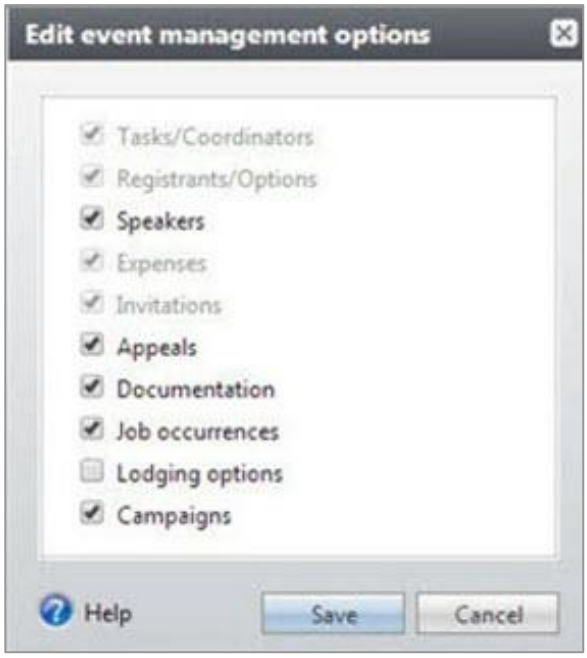
Edit Event Management Options

Event management options determine whether multi-level events can have registrants, speakers, lodging options, and more. Event templates set the options for multi-level events. However, you can override the options for events.

To override multi-level event options, such as whether the event can have registrants, go to the event and click **Edit event management options** under **Tasks**. Select the event options for the event, such as registrants, speakers, and expenses. When you set options for the event, the corresponding tabs appear for the event. For example, if an event can have speakers, the Speakers tab appears.

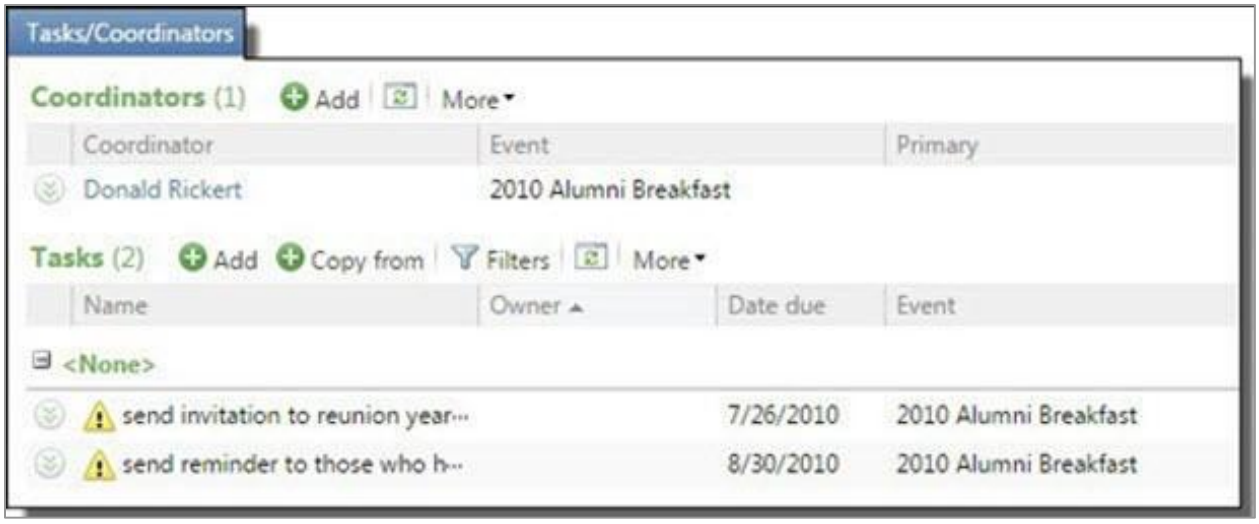
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TASKS AND COORDINATORS

On the Tasks/Coordinators tab of an event record, you can view and manage the coordinators and tasks associated with the event.



Under **Coordinators**, you can view all coordinators assigned to the event and manage them.

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Under **Tasks**, you can view information about the tasks required for the event. For each task, you can view its due date and owner.

Note: If this is a multi-level event, you can manage coordinators and tasks for the event and sub-events.

To view information about a task, select it in the grid and click **Show Details**. The **Details** window displays information such as status and notes. For a completed task, you can view its completion date.

As the tasks list grows, it may be difficult to find a particular task. To reduce the number of tasks that appear, you can filter the grid. To filter the grid, select whether to view all tasks or only those due by this week or this month and click **Apply**. You can also select whether to view completed tasks. To view all tasks, click **Reset**.

From the grid, you can add and manage the event tasks.

Manage Coordinators

Event coordinators are the staff members or constituent groups that oversee an event and make sure it runs smoothly, from the planning stages to the event itself. From the Tasks/Coordinators tab, you can add and manage the coordinators associated with the event.

Note: In order to select an individual to be a Coordinator, they must have the **Event Staff** constituency on their individual TED record.

You can also designate a primary coordinator for the event. The primary coordinator is displayed in the event summary view. It is highly recommended to designate a primary coordinator so that anyone who views the event summary will know who to contact should they have any questions about that event.

Add Event Coordinators

On the Coordinators tab of an event page, you can assign coordinators to the event.

Add a coordinator:

1. On the event record, select the Tasks/Coordinators tab and click **Add** under **Coordinators**. The Add screen appears.

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2. If this is a multi-level event, you can add coordinators to the event and any sub-events. In the **Event** field, select the event for the coordinator.

3. In the **Coordinator** field, select the constituent to assign as the coordinator.

4. You can mark one coordinator as the primary coordinator for the event. The primary coordinator is displayed in the event summary view.

5. Click **Save**. You return to the Tasks/Coordinators tab.

Manage Tasks

An event task is a job required in preparation for an event. You can assign tasks to staff members or to groups or group members involved with the event. From the Tasks/Coordinators tab, you can manage the tasks required for the event. For example, as task owners complete their tasks, you can mark the tasks as complete from this tab.

Add Event Tasks

An event task is a job required in preparation for an event. You can assign tasks to staff members or to groups or group members involved with the event.

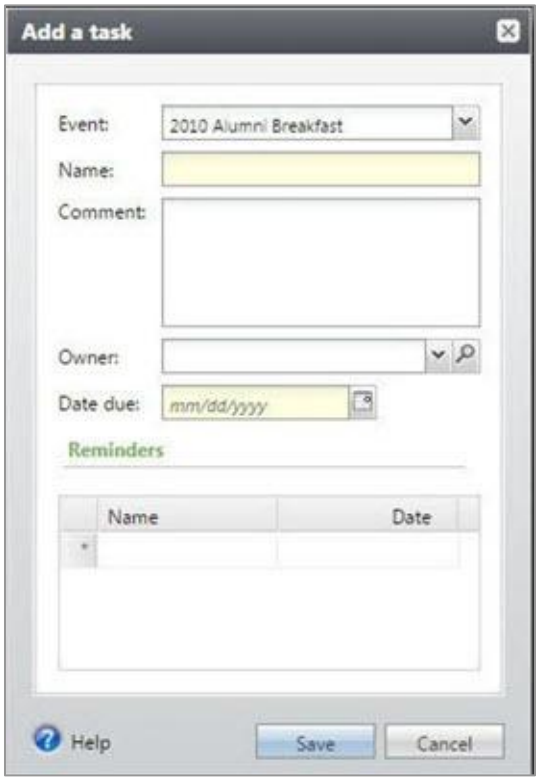
Tip: If an event requires the same tasks as another event, you can copy the tasks from one event to another.

Add an event task

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1. On the Tasks/Coordinators tab of an event record, click **Add** under **Tasks** and Add a task screen appears.



2. Select the event to which to add the task. For example, for a multi-level event, add the task to the event or a sub-event.
3. In the **Name** field, enter a unique name or description to identify the task.
4. In the **Comment** field, enter instructions or explanations for the task.
5. In the **Owner** field, select the event coordinator to assign the task, or search for and select the staffmember or constituent group to assign the task.
6. In the **Date due** field, select the date by which the owner must complete the task.
7. To set up email alerts to remind the owner to complete the task, under **Reminders**, enter the name and date for each alert.
8. Click **Save**. You return to the Tasks/Coordinators tab.

Add Task Screen

Screen Item	Description

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Event	For a multi-level event, you can add tasks for the event or a sub-event. Select the event for which to add the task.
Name	Enter a unique name or description to identify the task. If you configure a reminder for the task, this appears as the subject line of the email alert.
Comment	Enter instructions, comments, or explanations for the task.
Owner	Select the coordinator to which to assign the task, or search for and select the staff member or constituent group to perform the task.
Date due	For an active task, select the date by which the owner must complete the task.
Status	When you edit the task, this field appears. Select whether the task is active or completed.
Date completed	For a completed task, select the date the owner completes the task.
Reminders	To set up email alerts to remind the owner to complete the task, enter the name and date for each alert. When you edit the task, the grid displays whether a reminder has been sent. To send an email alert as a reminder, your organization must first configure a task reminder email alert from *Administration*.

Edit Event Tasks

After you add an event task, you can edit its details, such as to update its status.

Edit a task

1. On the Tasks/Coordinators tab of an event record, select a task under **Tasks** and click **Edit**. The Edit taskscreen appears.
2. Make changes. The items on this screen are the same as on the Add a task screen.

Tip: If you change the status to "Completed," select the date when the owner completed it.

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3. Click **Save**. You return to the Tasks/Coordinators tab.

Copy Event Tasks

If an event requires the same tasks as another event, you can copy the tasks from one event to another.

Copy tasks from another event

1. On the Tasks/Coordinators tab of an event record, click **Copy from** under **Tasks**. The Copy tasks screen appears.



2. The **Copy to** field displays the current event.
3. In the **Copy from** field, enter the name of the event to copy tasks form. To search for an event, click the binoculars. A search screen appears.
4. To return to the Tasks/Coordinators tab, click **Save**. Under **Tasks**, the copied tasks appear.
5. You can edit the tasks as necessary.

REGISTRATIONS

On an event page, the Registrations tab contains information about the constituents registered for the event. On the Registrants tab, you can manage information for registrants and registrant guests. You can add, edit, or delete registrants and guests.

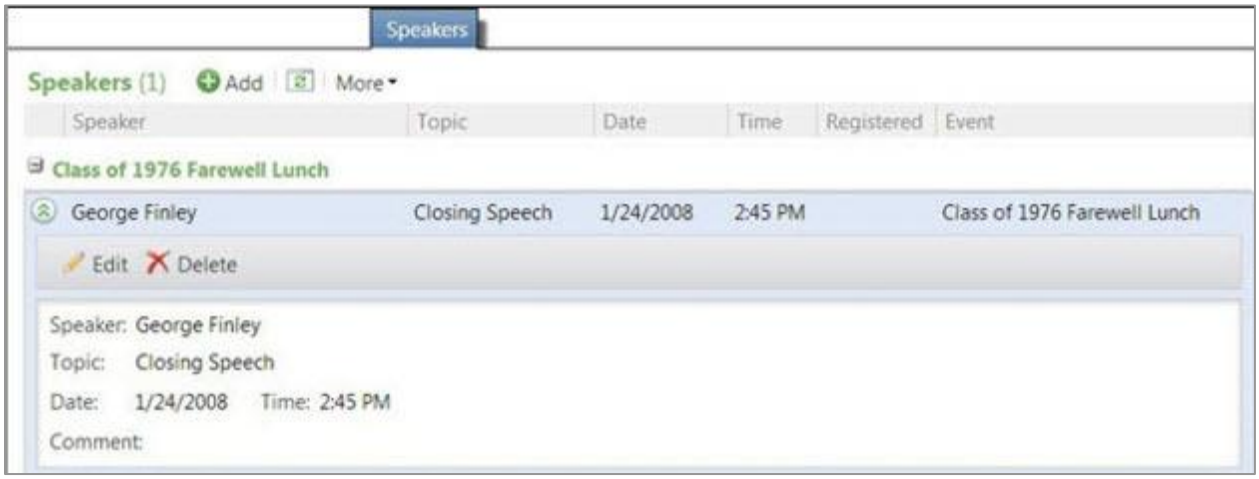
Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

EVENT SPEAKERS

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Your event may feature a speech such as a welcome address or seminar session. To view and manage the participants who give presentations at an event, select the Speakers tab on the event record.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Under **Speakers**, you can view the speakers associated with the event and information about their presentations such as topic and scheduled date and time. You can also view whether a speaker is also a registrant for the event. To view comments for a speaker, such as preferences or presentation description, select the speaker in the grid and click the down arrows on the action bar. A window appears and displays the speaker, presentation information, and comments for the speaker.

Note: If this is a multi-level event, you can manage speakers for this event and sub-events.

To view registration information about a speaker who is a registrant, click the name of the speaker in the grid. The registration record for the speaker appears.

From the grid, you can add and manage the event's speakers.

Add Event Speakers

From the Speakers tab, you can add information about the speakers scheduled for an event. Speakers must have an individual constituent record in your database. When you add a speaker to an event, you enter information about the presentation the speaker gives, such as topic and scheduled time.

Note: When an individual is both a speaker and a registrant at an event, the Participation tab on the registrant record displays information about the scheduled speech.

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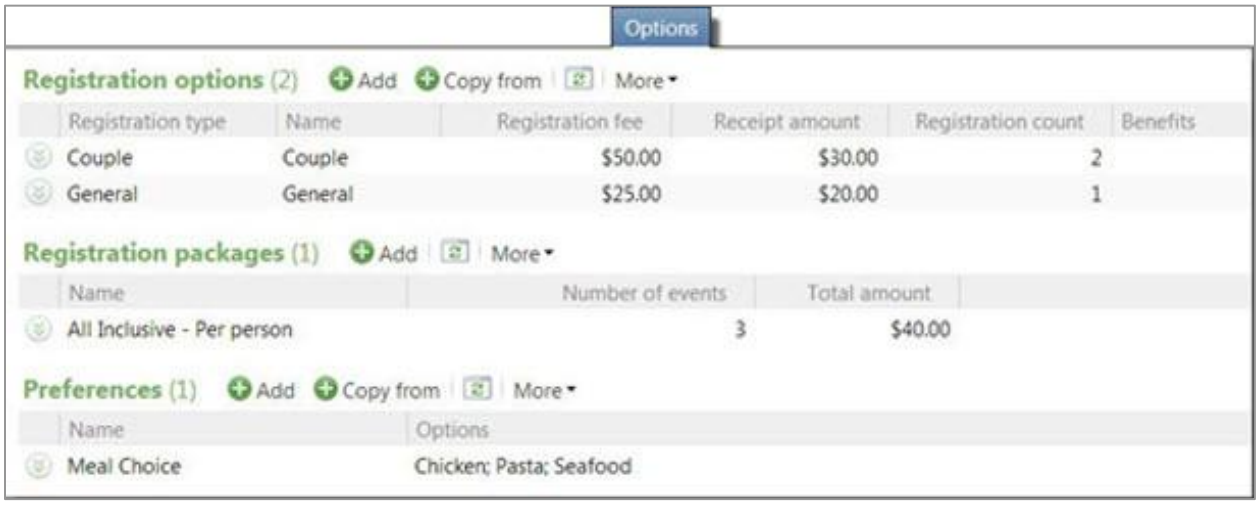
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Add a speaker

1. Open the record of the event for which to add a speaker
2. Select the Speakers tab
3. Under **Speakers**, click **Add** on the action bar. The Add a speaker screen appears.
4. If this is a multi-level event, you can add speakers for this event and any sub-events. In the Event field, select the event for the speaker.
5. In the **Speaker** field, search for and select the individual constituent scheduled to speak at the event.
6. In the **Topic** field, enter the subject or title of the presentation the speaker gives.
7. In the **Date** and **Time** fields, enter when the speaker is scheduled to speak. You must schedule the presentation within the dates and times of the event.
8. In the **Comments** field, enter information about the speaker, such as a request to have ice water near the podium, or the presentation, such as a detailed explanation of the topic.
9. Click **Save**. You return to the Speakers tab.

EVENT AND REGISTRATION OPTIONS

The Options tab contains information about the registration and preference options for the event.



Under **Registration options**, you can view the types of registrations for the event. For example, for a class reunion, you can create a registration option with a registration type of Individual and a cost of $0,

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and a registration type of Individual and Guest. From this grid, you can add and manage registration options for the event. Currently, TED Events does not collect and record event revenue with event registrations.

Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Under **Preferences**, you can view information about event preferences. For example, for an event that includes food, you can use meal preferences to track which registrants prefer a vegetarian food option. From the grid, you can add and manage preferences for the event.

Add Registration Options

To add a registration option, you must submit a ticket.

Copy Registration Options from an Event

If you use the same registration options for a variety of events, you can copy this information from one event to another. You can copy registration options to a single event from one or multiple other events.

Copy registration options from another event

1. Open the record of the event for which to add registration options.
2. Select the Options tab.
3. Under **Registration options** frame, click **Copy from** on the action bar. The Copy registration options screen appears.



4. In the **Copy from** field, search for and select the event to copy registration options.
5. To return to the Options tab, click **Save**.

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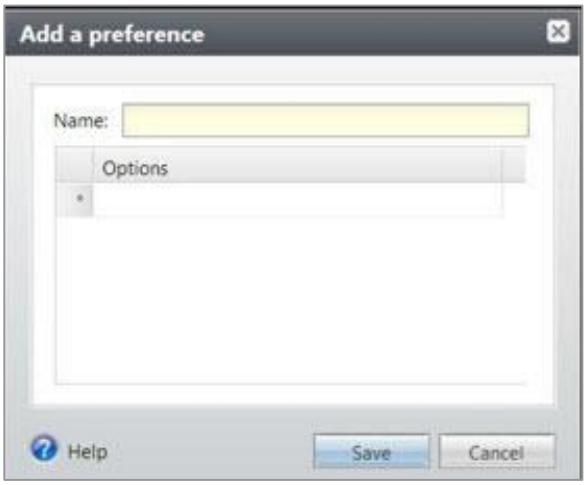
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Add Registration Preferences

For many events, you can capture preference information such as T-shirt size or meal preferences. When someone registers for the event, you can include these preferences for the registrant.

Add a registration preference

1. Open the event for which to add a preference.
2. On the Options tab, click **Add** under **Preferences**. The Add a registration preference screen appears.



3. Enter a name for the preference, such as “Shirt size,” and enter the options available for the preference.
4. Click **Save**.

Copy Event Preferences

If you use the same registration preferences for a variety of events, you can copy this information from one event to another. You can copy event preferences to a single event from one or multiple other events.

Copy event preferences from another event

1. Open the event for which to copy event preferences.
2. On the Options tab, click **Copy from** under **Preferences**. The Copy event preferences screen appears.

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3. In the **Copy from** field, click the magnifying glass to open the Event Search screen and select the event to copy event preferences.

4. Click **Save**.

INVITATIONS

The Invitations tab contains information about the constituents invited to the event. The **Event Invitees** grid displays a summary of invitees for the event. In this grid, you select to view a list of all invitees for the event, and you can copy invitees from another event. You can also use this list to directly register guests instead of searching for them.

In order for your Invitation List to appear on the Invitation tab, you must provide your event LID to Annual Giving and request for the invitation list to be loaded to the event. You will want to make this request at the beginning of your planning process when you discuss your data pulls.

EVENT DESIGNATIONS

On the Designations tab, there is functionality to select designations to associate with an event's fees. At this time, TED Events does not record event revenue on event registrations. As a result, you should not check this box.

DOCUMENTATION

Note: If this is a multi-level event, you can manage documentation for this event and sub-events.

You can add notifications to notes on an event record.

Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

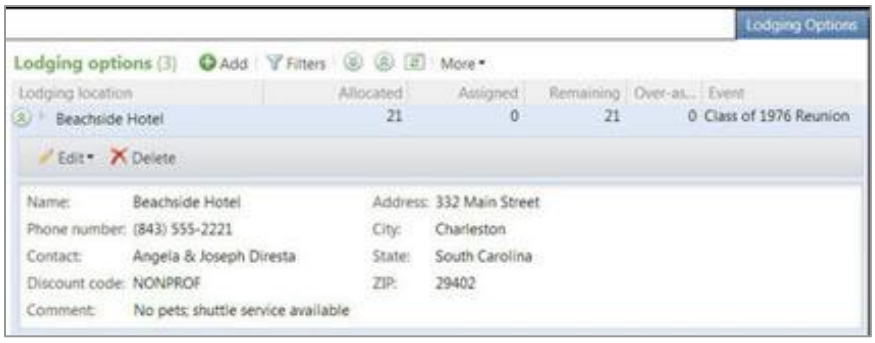
The Event Description field is copied directly from what was entered when the event was built. Documents, such as PDFs of the printed invitation, may appear here if they have been loaded via OnBase.

LODGING OPTIONS

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You may have registrants who travel to your event from some distance and require lodging facilities such as hotels or motels. To accommodate your registrants, your organization may negotiate with lodging facilities to reserve a number of rooms for the event. Your organization may also provide on-site lodging accommodations for registrants and guests. To view the lodging facilities and rooms allocated for an event, select the Lodging Options tab.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks.**

Under **Lodging options**, the lodging locations with rooms allocated for the event appear. For each location, you can view the number of rooms allocated for the event, how many of those rooms are assigned to registrants, how many remain at the location, and how many rooms are assigned to more registrants than capacity.

Note: If this is a multi-level event, you can manage lodging options for this event and any sub-events.

To view a breakdown of the room counts by type for a location, click its plus sign. As users associate registrants with lodging options for the event, the program updates the number of rooms that remain of each type at the location. To view the room types and counts for all locations, click **Expand all** on the action bar.

To view additional information about a location, select it in the grid. The window appears and displays the discount code and comments for the location.

From the grid, you can add and manage lodging locations.

Add Lodging Options for an Event

To accommodate your registrants, your organization may negotiate with multiple lodging facilities to reserve a number of rooms for the event. On the Lodging options tab of an event record, you can add information about the lodging locations that have rooms allocated for the event. When you add a

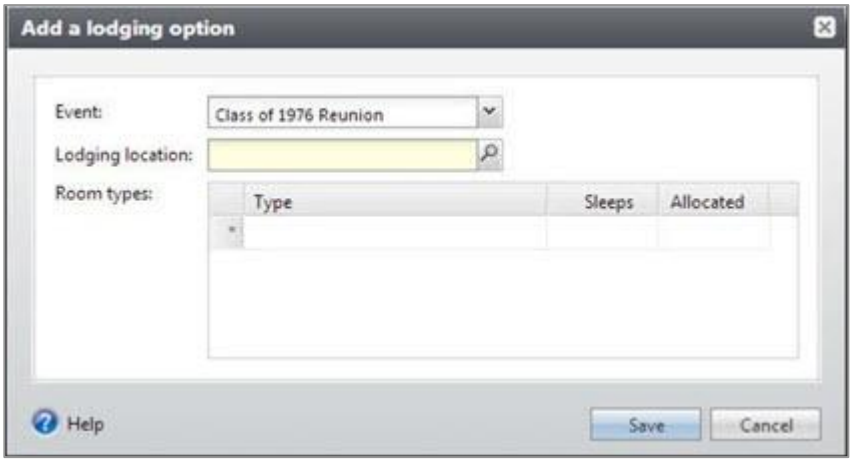
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lodging option, you select the lodging location and enter information about the rooms reserved for your registrants.

Add a lodging option

1. Open the record of the event for which to add a lodging option.
2. On the Lodging Options tab, click **Add** under **Lodging options**. The Add a lodging option screen appears.



3. If this is a multi-level event, you can add lodging options for this event and sub-events. In the **Event** field, select the event for the lodging option.
4. Search for and select the lodging location with rooms allocated for the event. If your location does not appear, you can submit a ticket to have it added.
5. In the **Room types** grid, enter information about the rooms allocated at the location.
    a. In the **Type** column, select the types of rooms allocated at the location, such as Smoking and Non- smoking or by bed size. You configure room types when you add the lodging location to the database.
    b. In the **Sleeps** column, enter the number of occupants each room type holds.
    c. In the **Allocated** column, enter the number of rooms reserved for each type.
6. Click **Save**. You return to the Lodging Options tab.

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ATTRIBUTES

Attributes allow you to store useful information about events. You can set up event attributes in *Administration*, and you can add them to events on the Attributes tab of the event page or on the Event Details tab of the Friends Asking Friends Configure page. Event attributes can supplement the information stored on event records so that you can track information that is important to your organization. You can create an unlimited number of attributes for events.

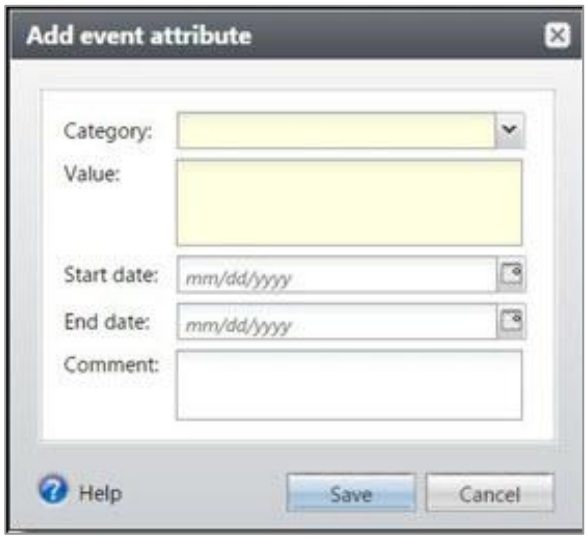
Add Event Attributes

On the Attributes tab of an event page, you can add attributes for the event. You can use attributes to manage and track important details about your event.

Note: The Attributes tab appears for events only if your system administrator configured event attributes.

Add an event attribute

1. On the Attributes tab of an event record, click **Add**. The Add event attribute screen appears.



2. In the **Category** field, select a category for the attribute. Your system administrator sets up attribute categories in *Administration*.

3. In the **Value** field, enter a value or description for the attribute. For example, if the category is Awards, you might enter "Service Award." Make sure to enter a value that accurately identifies the attribute throughout your database.

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4. In the **Start date** and **End date** fields, enter the dates when the attribute is valid for the event.
5. In the **Comment** field, enter information or comments about the attribute.
6. Click **Save**. You return to the Attributes tab.

Add Event Attribute Screen

The table below explains the items on this screen.

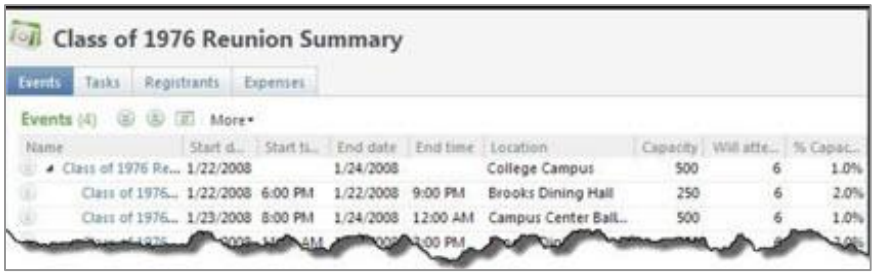
Screen Item	Description
Category	Select a category for the attribute. Your system administrator sets up attribute categories in *Administration*.
Value	Enter a value or description for the attribute. For example, if the category is Awards, you can enter "Service Award." Make sure to enter a value that accurately identifies the attribute throughout your database.
Start date/End date	Enter the start date and end date when the attribute is valid for the event.
Comment	Enter comments or information about the attribute.

EVENT SUMMARY PAGE

For an event with associated supporting events, from the main event page, you can view an event summary page. The event summary is a view in which all tasks, registrants, and expenses are brought in from the individual supporting events. To view the summary page, on the main event page, click **View the summary for [selected event]** in the summary area of the main event page.

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Events Summary

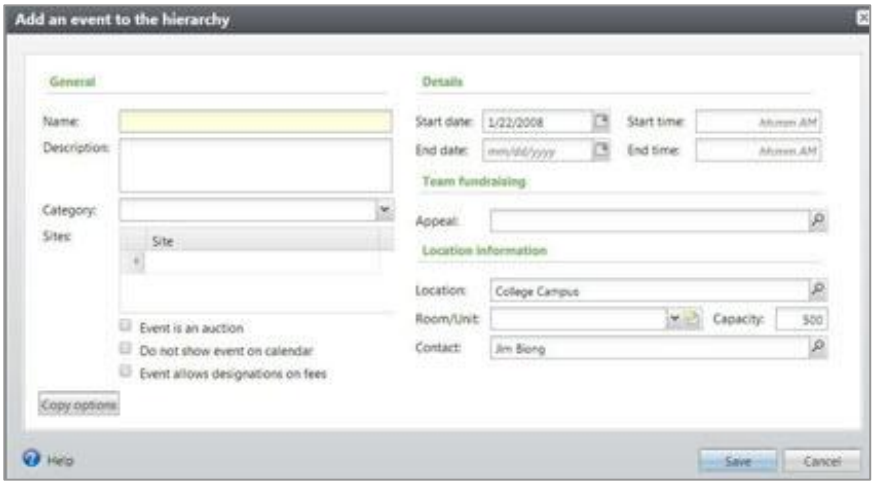
The Events tab in the summary view contains information about the event and supporting events. On the Events tab of the event summary page, you can add supporting events, edit events, and delete events.

Add an Event to the Hierarchy

If your organization sponsors large events comprised of smaller events, you can add supporting events to a main event. For example, if you have an alumni weekend in May each year, you can designate “Alumni Weekend” as the main event and add supporting events such as “dinner” or “golf outing” to the main event.

Add an event to the hierarchy

1. Open the event for which to add a supporting event.
2. Click **Add** on the action bar. The Add an event to the hierarchy screen appears.

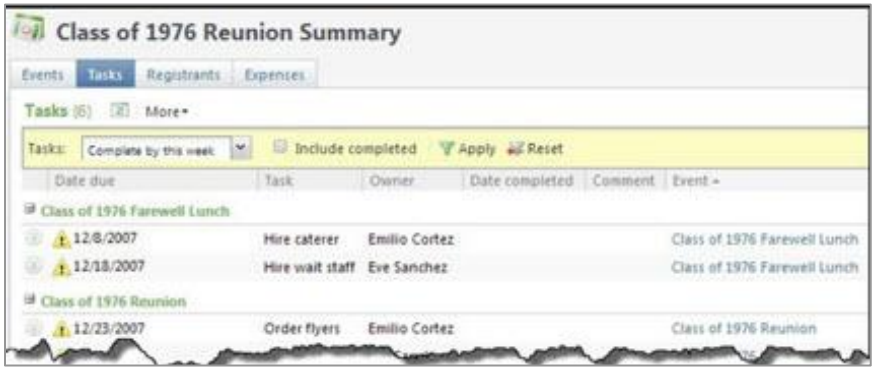


3. Enter information in the fields.
4. Click **Save**.

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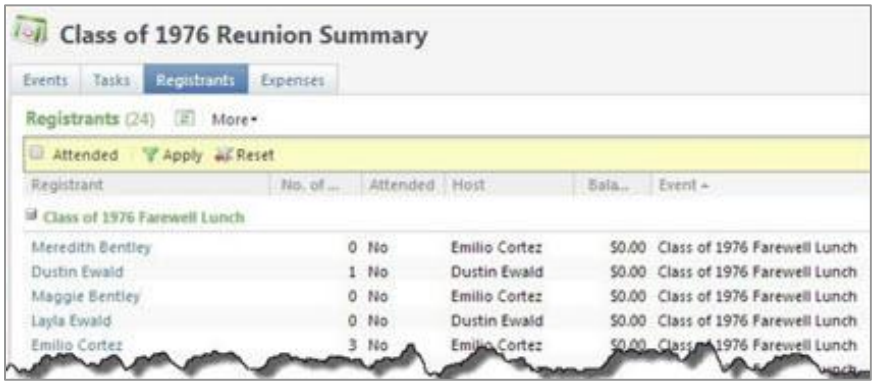
Tasks Summary

When you view an event summary, the Tasks/Coordinators tab displays tasks for all events associated with the main event. By default, in the **Tasks** grid, the tasks are listed by event. To sort the events, click the column by which to sort.



Registrants Summary

When you view an event summary, the Registrants tab displays registrants for all events associated with the main event. By default, in the **Registrants** grid, the registrants are listed by event. To sort the events, click the column by which to sort.



EVENTS OVERVIEW PAGE

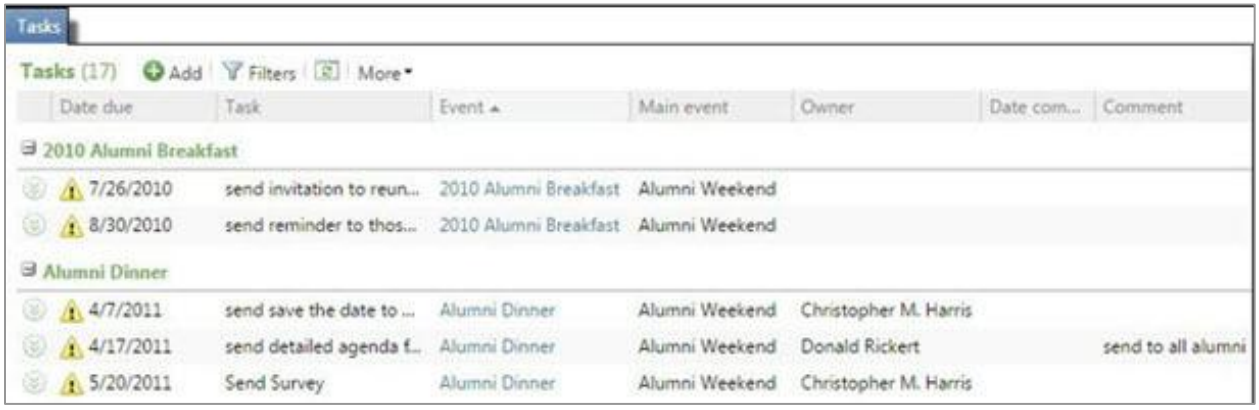
The Events Overview page, accessible from *Events*, displays all events and their associated tasks in a single view. On the Events Overview page, you can manage all your organization's events and tasks, or only those assigned to you. From the tabs, you can add, edit, and delete events or tasks, mark tasks complete, and go to specific events or tasks.

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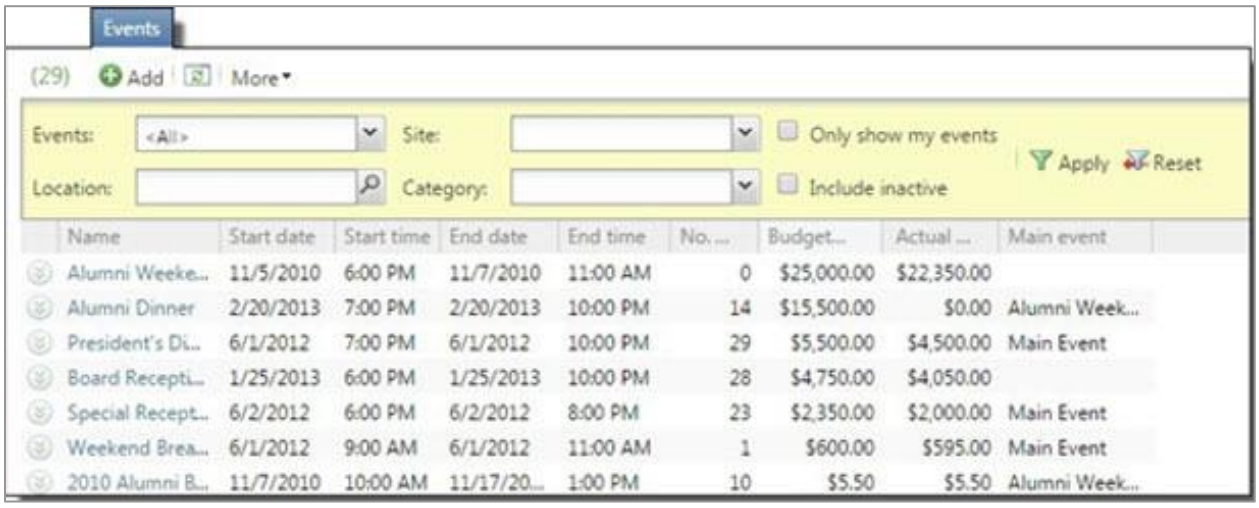
Tasks

On the Events Overview page, the Tasks tab displays tasks for events. By default, tasks appear by event. To sort the events, click the column by which to sort. To display only those tasks assigned to you, select **Filters** and click **Only show my tasks**.



Events

On the Event overview page, the Events tab displays all events. By default, under **Events**, events appear alphabetically. To sort the events, click the column by which to sort.



EVENT CALENDAR

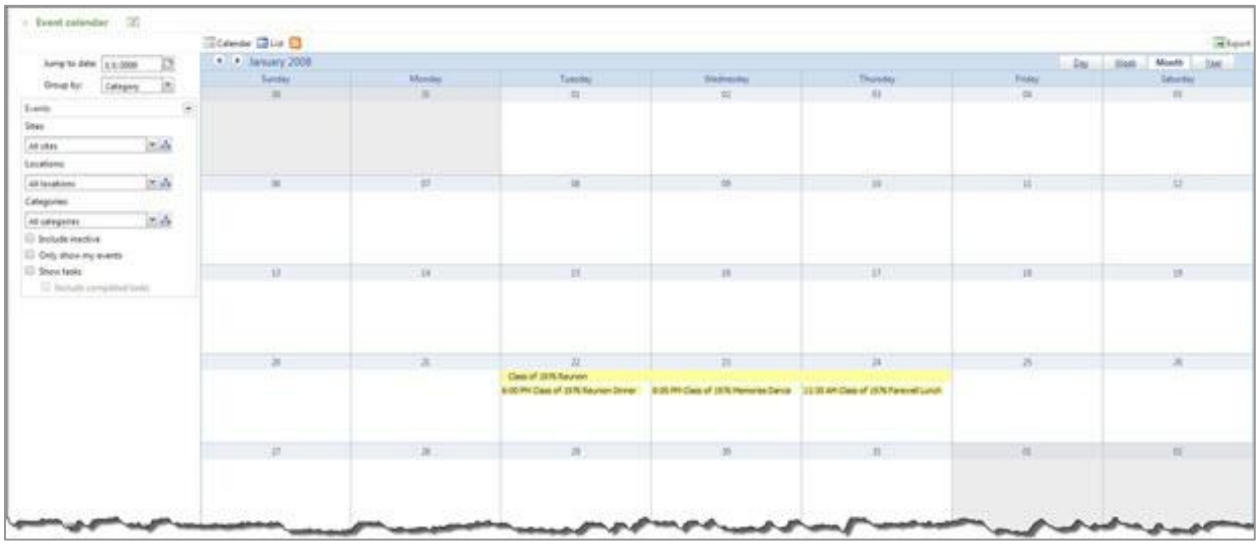
To view the event calendar, from the TED homepage, click the Events tab at the top of the page, then select Event Calendar. The event calendar displays events that occur within the selected date range.

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You can narrow the events displayed by month, week, day, site, category, or location. You can mark events to not be displayed on the event calendar.

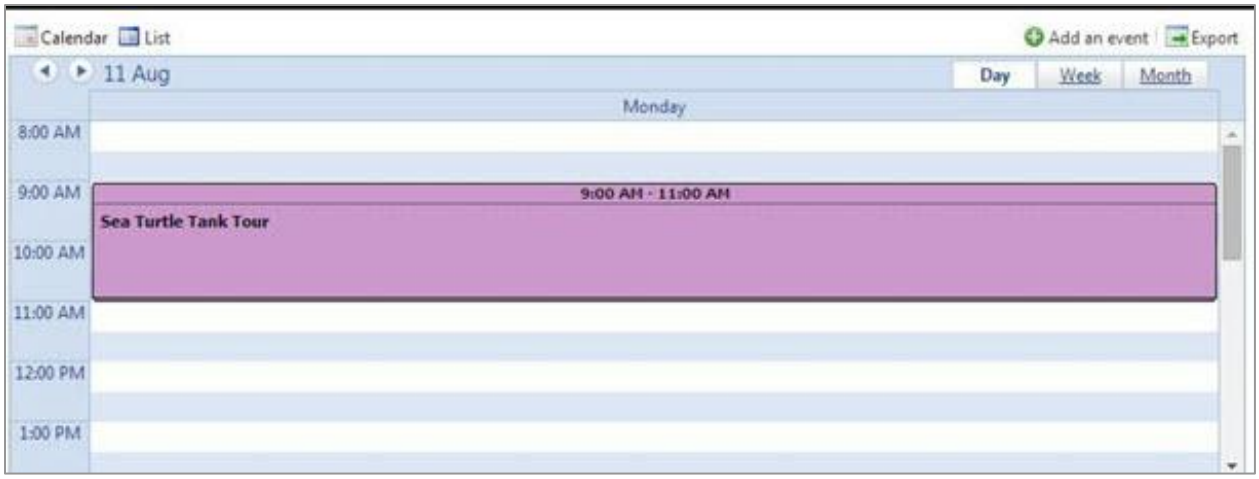
Note: An event coordinator can view all available events and tasks, but a task owner can view only those tasks and events assigned to him personally.



There are several steps you must take before you can schedule events.

View Event Calendar by Day

With the event calendar, you can select different views. You can view a detailed calendar for a specific day. The day view includes detailed information about events and tasks scheduled for that day. The day view is broken down by hours. To view the event calendar for a specific day, select the day and click **Day** at the top of the screen. The day view appears.

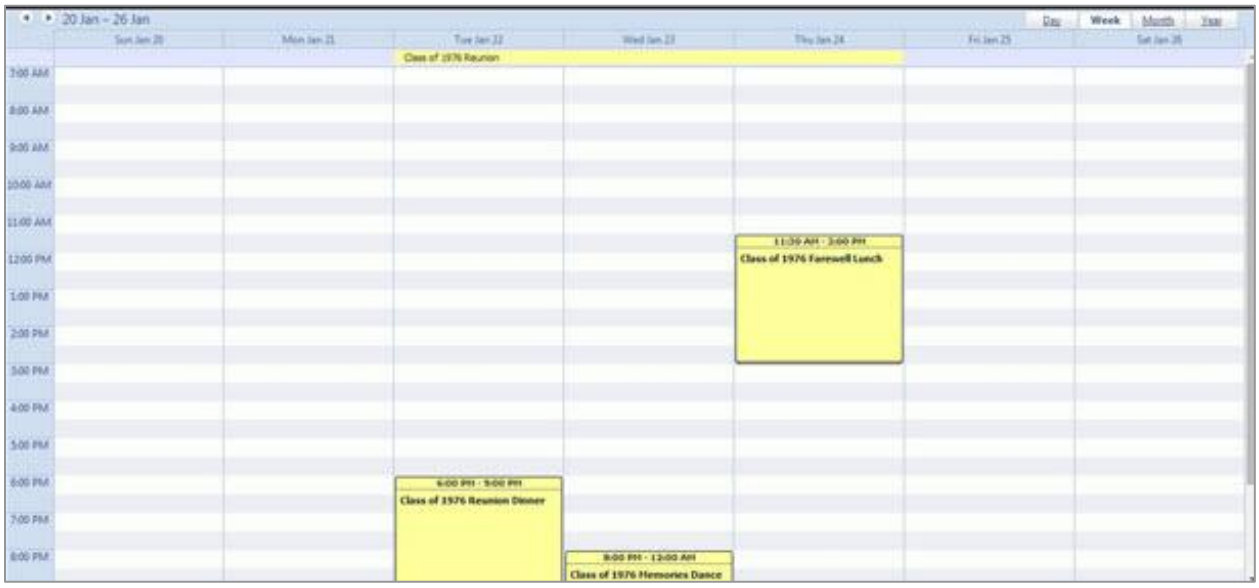


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View Event Calendar by Week

With the event calendar, you can select different views. You can view a detailed calendar for a specific week. The week view includes detailed information about events and tasks scheduled for that week. The week view is broken down by days. To view the event calendar for a specific week, select a day in that week and click **Week** at the top of the screen. The week view appears.



View Calendar by Month

With the event calendar, you can select different views. You can view a detailed calendar for a specific month. The month view includes information about events and tasks scheduled for the entire month. The month view is broken down by weeks. To view the event calendar for a specific month, select a day in that month and click **Month** at the top of the screen. The month view appears.

Filter Calendar Events and Tasks

With the event calendar, you can select different views. You can view a detailed calendar for a specific month. The month view includes information about events and tasks scheduled for the entire month. The month view is broken down by weeks. To view the event calendar for a specific month, select a day in that month and click **Month** at the top of the screen. The month view appears.

Note: An event coordinator can view all events, tasks, but a task owner can view only those tasks and events assigned to him personally.

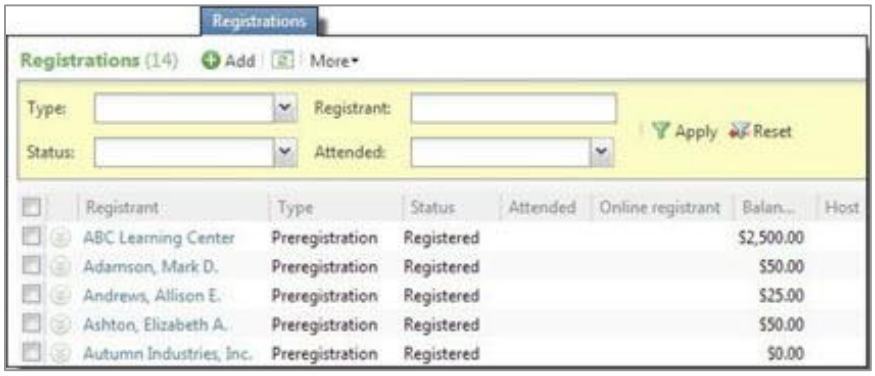
EVENT REGISTRATION

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Registrants and Guests

On the Registrations tab of an event record, you can view and manage information about registrants and their guests.



Under **Registrations**, you can check attendance status and review who has a conflict with another event. To view additional information about a registrant, select the registrant's name in the grid. The record of the registrant appears. At the top of that registrant record, click on the link of the person's name and it will take you directly to the constituent record for that registrant.

As the registrant list increases over time, it may be difficult to find a specific registrant. To narrow the list, you can filter the grid by registrant, registrant status, if the registrant attended, or event type such as Invitation or Walk- in. Select the criteria of the registrants to view and click **Apply**. To remove the filter and view all registrants in the grid, click **Reset**.

Registrant Status Options

From the event registrant record, you can mark the status of a registrant, such as to indicate whether he or she cancels or attends the event.

Screen Item	Description
Will not attend	When a registrant informs you that he or she cannot attend an event, select this option. To do this, select the registrant and click **Mark as, Will not attend**. In the grid, the **Status** column displays Will not attend for the selected registrant.
Will attend	When a registrant informs you that he or she will attend an event, select this option. To do this,

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	select the registrant and click **Mark as, Will attend**.
No-show	When a registrant informs you he or she will attend an event, but then does not show up without notifying you, select this option. To do this, select the registrant and click **Mark as, No-show**. In the grid, the **Attended** column displays No show for the selected registrant.
Canceled	If a registrant refunds a registration, you can indicate that the registrant canceled the event. Select the registrant and click **Mark as, Canceled**. In the grid, the **Status** column displays Canceled for the selected registrant.
Attended	After an event, you can indicate which registrants attended the event. To mark a registrant as attended, select the registrant in the grid and click **Mark as, Attended**. In the grid, the **Attended** column displays Yes for the selected registrant.
Register for event	If the constituent accepts an invitation to an event and wants to register for the event, click the **Register** button. The Add registrant screen appears.
Mark all as attended	After an event, you can indicate that all registrants attended the event. Click **Mark**, **Mark all as attended**. In the grid, the **Attended** column displays Yes for all registrants not already marked as Canceled or Will not attend, and for all guests of registrants not already marked as Canceled.

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Mark as not attended	After an event, if you mark a registrant as attended when he or she did not actually attend the event, you can indicate that the registrant did not attend the event. Select the registrant and click **Mark as**, **Mark as not attended**.

Update All Registrants of an Event

When you want to update the attendance of all registrants with open attendance statuses after an event is over, you can use the **Update event attendance** task. For example, you may want to designate all registrants with an open status as "No-show."

Update all unspecified registrant attendance statuses

1. From the event record, under **Tasks**, click **Update event attendance**. The Update event attendance screen appears.



2. Select to change all specified registrant attendance statuses to **No-show** or **Attended.**
3. To complete the update and click **Save**. Any registrant in the **Registrations** grid without a status assigned in the **Attended** column now displays your selected attendance status.

Add Registrants and Guests

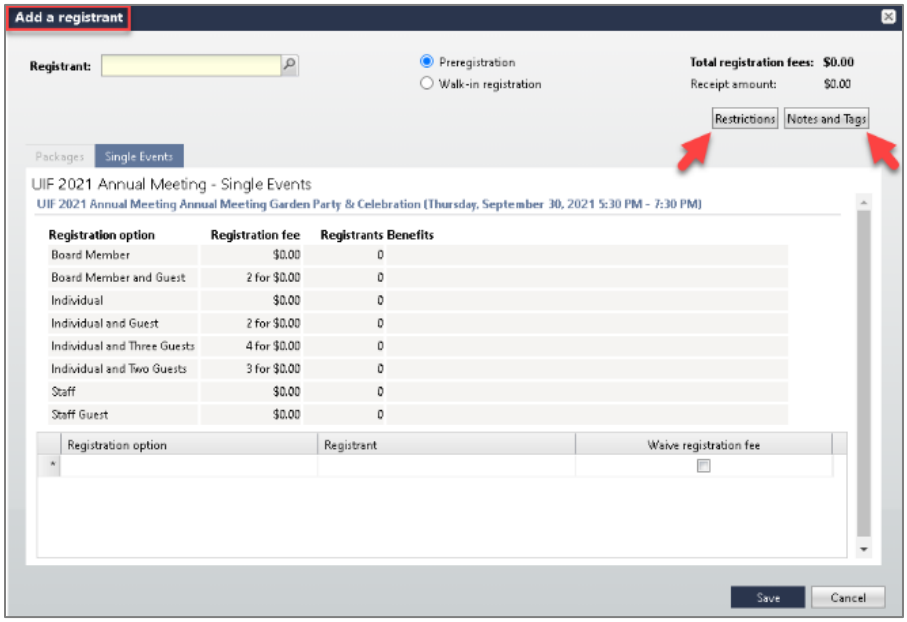
Registrants are the event attendees, players, coordinators, instructors, vendors, and other businesses that supply a service or product for the event, or any other person involved with the event. You can use the Registrations tab of an event page to add registrants and registrant guests.

Follow these steps to record event registrations in TED.

Step	Task
1.	Locate the correct **Event** record in TED.
2.	Open the **Registrations** tab.

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3.	Choose the **Add** button.
4.	Using the search icon, locate the **constituent record** to add as the registrant.
5.	Select a **registration option** from the dropdown.
6.	If you are adding a **guest**, add the information below the registrant by selecting a registration option then choose a named constituent in TED or Unnamed guest.
7.	If you would like to add restrictions or notes to a guest, highlight their name within the registration form and then click on the **Restrictions or the Notes and Tags button**. Add your additional information and then **click Save**. You will be returned to the original registration page.
8.	Click **Save**



ENTER EVENT REGISTRATIONS FROM AN INVITATION LIST

Follow these steps to record event registrations using the invitation list in TED.

NOTE: Invitations are populated when the invitation list is requested if the event information is provided so it can be linked.

Step	Task

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1.	Locate the correct **Event** record in TED.
2.	Open the **Invitations** tab.
3.	Click the **Invitees** link to open the invitation list.
3.	Locate the **constituent record** to add as the registrant.
4.	Click the down arrows next to the constituent's name, click **Register.**
5.	Select a **registration option** from the dropdown.
6.	If you are adding a **guest**, add the information below the registrant by selecting a registration option then choose a named constituent in TED or Unnamed guest.
7.	If you would like to add restrictions or notes to a guest, highlight their name within the registration form and then click on the **Restrictions or the Notes and Tags button**. Add your additional information and then **click Save**. You will be returned to the original registration page.
8.	Click **Save**

DELETE EVENT REGISTRATIONS OR MARK AS WILL NOT ATTEND

NOTE: The delete option should be used if a registration was entered in error. Otherwise, it's best to select the Will not attend option.

Follow these steps to delete event registrations in TED.	
Step	**Task**
1.	Locate the correct **Event** record in TED.
2.	Open the **Registrations** tab.
3.	Click the down arrows next to the constituent's name, click **Delete.**

Follow these steps to mark a registration as will not attend.	
Step	**Task**
1.	Locate the correct **Event** record in TED.
2.	Open the **Registrations** tab.
3.	From the down arrows next to the constituent's name, click **Mark as.**
4.	Select **Will not attend** from the **attendance options** drop down.
5.	Click yes to **confirm** the update to the registrant's attendance status or click no to cancel.

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Follow these steps to mark a guest registration as cancelled. Note: This functionality allows unnamed guests to be recorded as cancelled without deleting the registration, allowing for a more accurate tracking of registrations.	
Step	**Task**
1.	Locate the correct **Event** record in TED.
2.	Open the **Registrations** tab.
3.	From the down arrows next to the constituent's name, click **Mark as.**
4.	Select **Guest Cancelled** from the **attendance options** drop down.
5.	Click yes to **confirm** the update to the registrant's attendance status or click no to cancel.



Update All Registrants of an Event

When you want to update the attendance of all registrants with open attendance statuses after an event is over, you can use the **Update event attendance** task. For example, you may want to designate all registrants with an open status as "No-show."

Update all unspecified registrant attendance statuses

1. From the event record, under **Tasks**, click **Update event attendance**. The Update event attendance screen appears.



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2. Select to change all specified registrant attendance statuses to **No-show** or **Attended.**
3. To complete the update and click **Save**. Any registrant in the **Registrations** grid without a status assigned in the **Attended** column now displays your selected attendance status.

Edit Registrants and Guests

After you add a registrant for an event, you can change the information about that registration, including guests or event preferences.

Edit a registrant or guest

1. Access the event for which to edit the registration.
2. On the Registrations tab of an event, click the down arrow next to the registration to edit.
3. Click **Edit**, **Edit registrations**. The Edit registrant screen appears.
4. On the Event tab, edit the number of registrations for the constituent for each registration option type.
5. Click the arrow next to the quantity to display registrant and guest information, as well as any event preferences. The fields vary based on the registration options and preferences for the event. You can also select the checkbox to waive the event registration fee.
6. To view a summary of registration information on the Event tab, select the Summary tab.
7. To save the registrant, along with any guest or preference information, click **Save**.

Add Guest Registrants

You can use the Registrations tab of an event page to add registrants and their guests. If a registrant includes the name of a guest with the registration, you can enter the guest as a constituent in your database.

You can add guests when you first add the primary registrant.

If a registrant has unknown guests, you can edit the registration later to add guest and preference information.

Edit Registrants

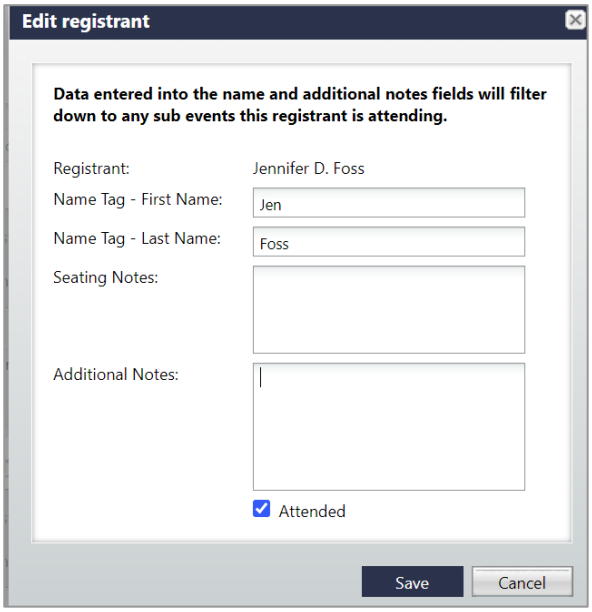
After you add a registrant, you can edit details for that registrant. On the Registrations tab of the event page, in the **Registrants** grid, you can select a registrant to edit.

Edit a registrant

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1. On the Registrations tab of an event record, select the registrant under **Registrants** and click **Edit**, **Edit registrant**. The Edit registrant screen appears.



2. Update the registrant or seating note information as necessary. You can also use the field for Additional Notes any way you choose. Perhaps you need a place to mark if someone needs a parking pass or has another request you want recorded. Here you can also mark that the registrant has attended the event.

3. To return to the Registrations tab, click **Save**.

EVENT REGISTRANT RECORD

The event registrant record displays information about guests, registrations, and preferences for the selected registrant. You can add, edit, and delete information from this tab.

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Registrant Page Options

From the registrant page, you can mark the status of a registrant to indicate whether he or she cancels or attends the event.

Screen Item	Descriptions
Mark as will not attend	When a registrant informs you that he or she cannot attend an event, select this option. To do this, select the registrant in the grid and click **Mark as will not attend** under **Tasks** on the explorer bar.
Mark as will attend	When a registrant informs you that he or she will attend an event, select this option. To do this, select the registrant in the grid and click **Mark as will attend** under **Tasks** on the explorer bar.
Mark as attended	After an event ends, you can update registrants to indicate they attended the event. To mark a registrant as attended, select the registrant in the grid and click **Mark as attended** under **Tasks** on the explorer bar.
Refresh	To make sure you have the latest information, click **Refresh** under **Tasks** on the explorer bar.

Registrations Tab

The Registrations tab contains information about the registration options for the registrant. On this tab, you can add, edit and delete registrations and guest information in addition to event preferences.

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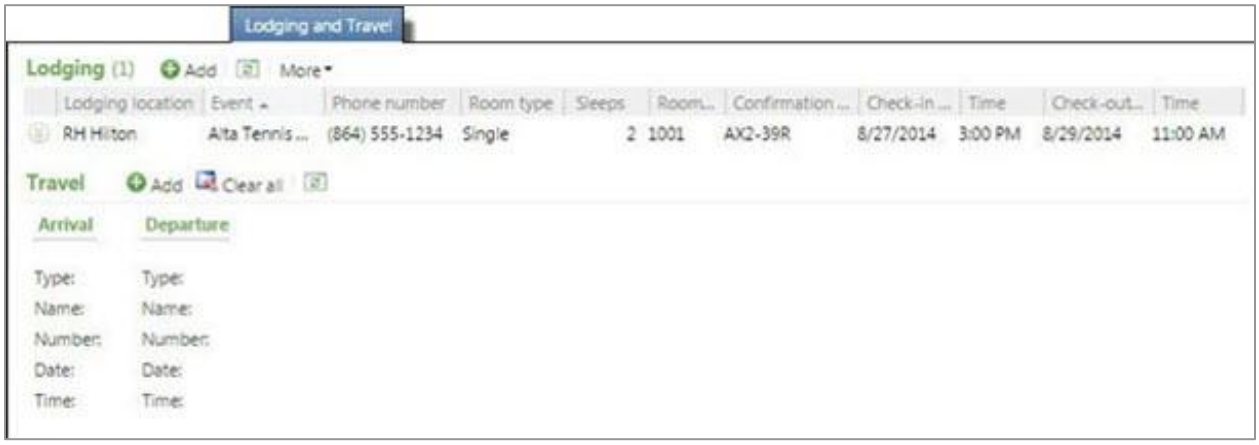
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For an event with supporting events, such as a reunion weekend, some events may occur at the same time. When you register a constituent for a single event that occur at the same time or overlap, a warning icon appears next to the events that conflict. The tab displays the dates and times of each event so you can identify the conflict and determine whether it is a mistake with the registration.



Registrant Lodging and Travel

You may have registrants who travel to your event and require lodging facilities such as hotels or motels. To help accommodate your registrants, your organization may reserve a number of rooms for the event. Your organization may also provide on-site lodging accommodations for registrants and guests. As registrants make reservations at lodging locations associated with an event or schedule travel to your event, you can track information about a registrant's lodging and travel plans on the Lodging and Travel tab of the host registrant's record.



Under **Lodging**, you can manage and view the lodging location where the registrant plans to stay during the event. You can also view information such as the phone number where you can contact the registrant during the event or find the room and reservation information the registrant has at the lodging location.

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Under **Travel**, you can view information about how the registrant travels to the event and arrival and departure information. From **Travel**, you can manage the travel information for the registrant.

Add Lodging Information for a Registrant

You may have registrants who travel to your event from some distance and require lodging facilities such as hotels or motels. On the Lodging and Travel tab of a registrant record, you can track information about the registrant's accommodations during the event.

Before you can add lodging information for an event registrant, you must configure the lodging locations and room types available for registrants of the event. The program automatically uses the registrant's room option and number to calculate the number of available rooms that remain at each lodging option for the event. We recommend that the number of registrants assigned a room number at a lodging location not exceed the capacity of its room type.

Add registrant lodging information

1. On the record of the event registrant, select the Lodging and Travel tab.
2. Under **Lodging**, click **Add**. The Add registrant lodging screen appears.



3. Select the lodging location where the registrant plans to stay for the event. You must configure a lodging location as a lodging option for the event.
4. In the **Phone number** field, enter the phone number where your organization can contact the registrant during the event.
5. In the **Room option** field, select the type of room the registrant reserves at the location. This information determines the number of rooms that remain of each type at the lodging location.

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6. In the **Room number** field, enter the number of rooms where the registrant stays at the location. To view the number of registrants already assigned the same room number, click **Check availability**.

7. Enter the confirmation number for the registrant's reservation at the location.

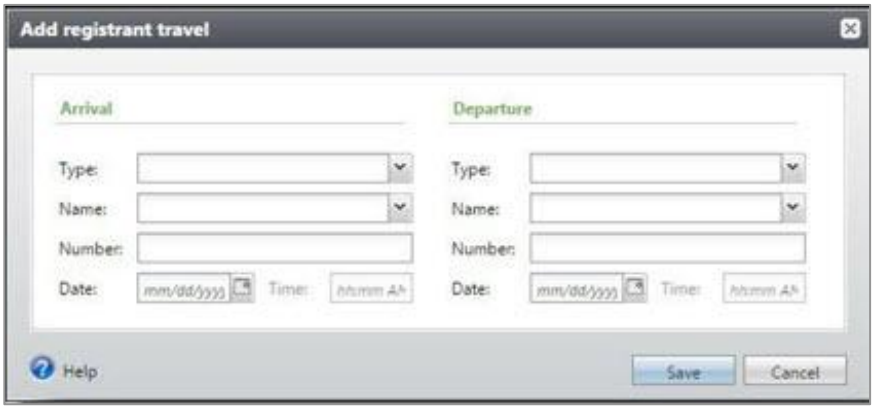
8. Enter the dates and times the registrant checks in and out of the lodging location.

9. To return to the Lodging and Travel tab, click **Save**.

Add registrant travel information

1. On the record of the event registrant, select the Lodging and Travel tab.

2. Under **Travel**, click **Add**. The Add registrant travel screen appears.



3. Under **Arrival** and **Departure**, enter information about how the registrant travels to and from the event.

    a. In the **Type** field, select the means of transportation (air or bus) that the registrant will use. Your system administrator configures the travel types available for this field.

    b. In the **Name** field, select the name of the travel carrier (Delta or Greyhound) that the registrant will use. Your system administrator configures the travel carriers available for this field.

    c. In the **Number** field, enter the vehicle number, such as the flight number or bus number.

    d. Enter the date and time of the registrant's arrival or departure.

4. To return to the Lodging and Travel tab, click **Save**.

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Add Travel Information for a Registrant

You may have registrants who travel to your event from some distance. On the Lodging and Travel tab of a registrant record, you can track information about the registrant's travel arrangements for the event.

Clear All Registrant Travel Information

From the Lodging and Travel tab of a registrant record, you can delete all travel information for the registrant. Under **Travel**, click **Clear all**. When a message appears to ask whether to delete the travel information, click **Yes**.

After you clear the travel information, you can enter the new travel information as necessary.

Registrant Restrictions

Registrants may have dietary or physical restrictions, such as allergies or mobility restrictions. After you register constituents for an event, you can track restrictions on the Restrictions tab of a registrant record.

Note: You can also track event restrictions on the Personal tab of a constituent record. When constituent records specify restrictions, they automatically appear on the Restrictions tab of the registrant record. On the Restrictions tab, you can update the restrictions added on the constituent record.



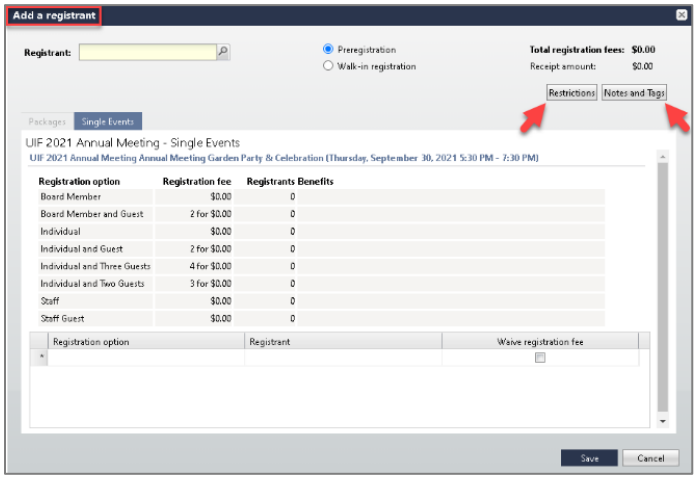
Edit Registrant Restrictions

Registrants may have dietary or physical restrictions, such as allergies or mobility restrictions. On the Restrictions tab of a registrant record, you can maintain restrictions for the registrant.

You may also add this information at the time of registration using the Restrictions button on the registration page.

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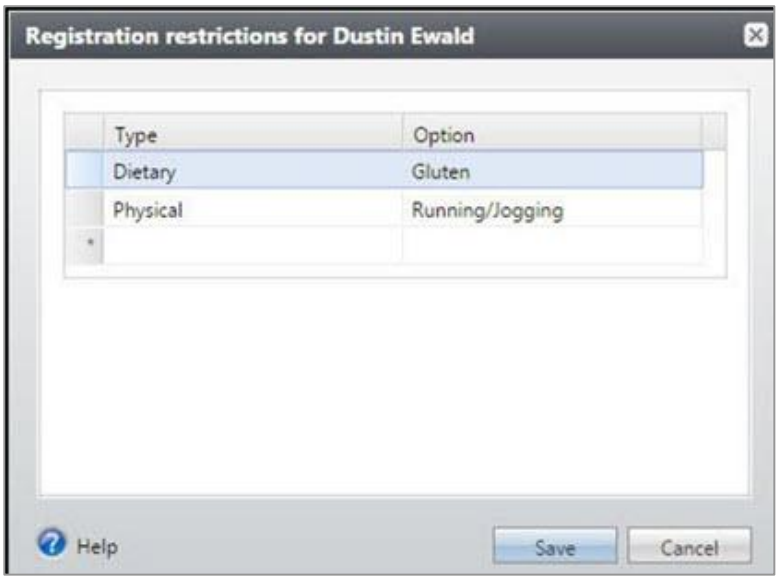
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Post-registration, to Edit registration restrictions:

1. On the record of the event registrant, select the Restrictions tab.

2. Select the restriction to edit and click **Edit registration restrictions**. The Registration restrictions screen appears.



3. Select the necessary restriction types and options.

Note: If the restriction type or option does not appear, you must configure a new one.

4. To return to the Restrictions tab, click **Save**.

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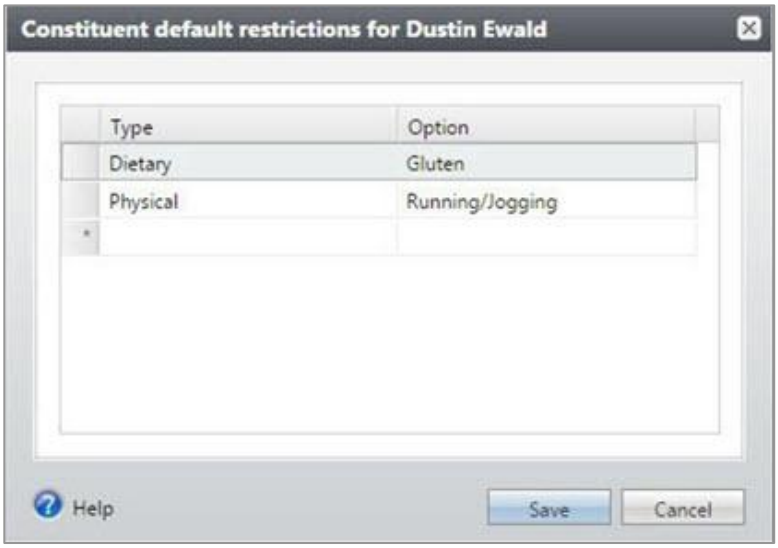
Edit Constituent Default Restrictions

When event restrictions are set on a constituent record, they appear on the Restrictions tab of a registrant record. You can edit restrictions, such as for a recent physical injury.

Edit constituent default restrictions

1. On the record of the event registrant, select the Restrictions tab.

2. Click **Edit**, **Constituent default restrictions**. The Constituent default restrictions screen appears.



3. Edit the restriction types and options.

    - To add a restriction type, click a blank row, and select the restriction type and option.
    - To edit a restriction type or option, click the cell, and select the restriction type or option.
    - To delete a restriction, select the row, and press **DELETE** on your keyboard. When a confirmation message appears, click **Yes**.

4. To return to the Restrictions tab, click **Save**.

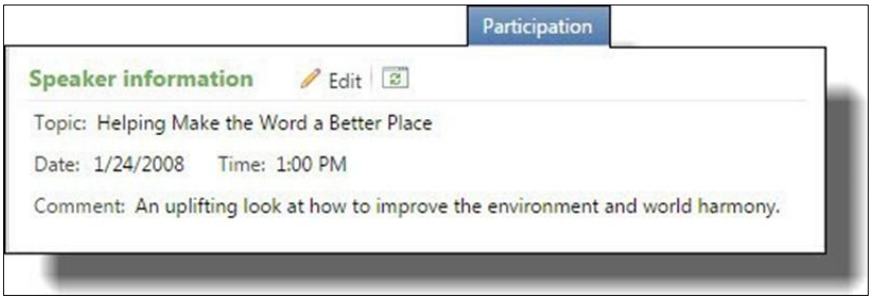
Registrant Participation

A registrant may participate in an event as more than an attendee. For example, a registrant may agree to speak at the event, such as part of a welcome address or seminar session. To view information about the registrant's involvement in an event, select the Participation tab on the registrant record.

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Note: You can add a registrant as a speaker from the record of the registrant or the event.



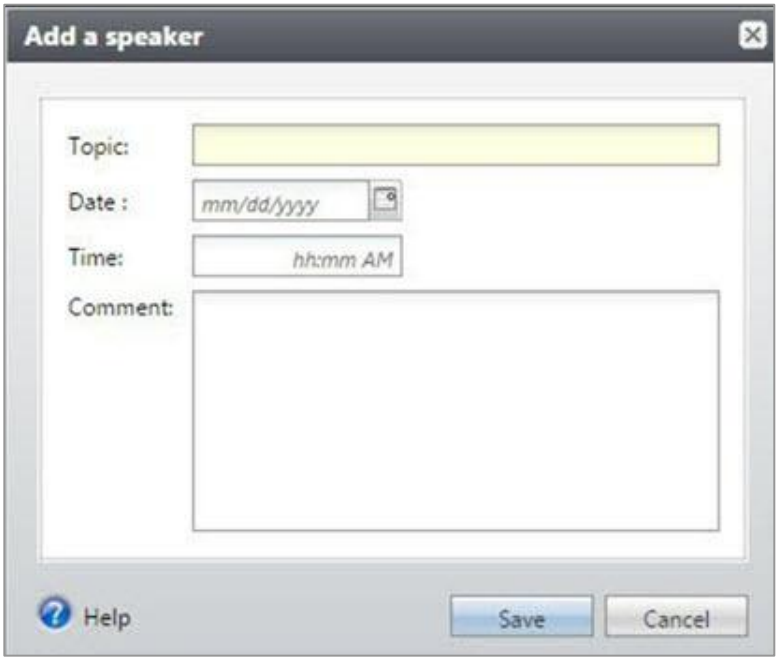
Under **Speaker information**, information about the presentation given by the registrant appears, such as topic and scheduled time.

Add a Registrant as an Event Speaker

When a registrant agrees to speak or give a presentation at your event, you can add the registrant as a speaker. After you add a registrant as an event speaker, the Participation tab appears on the registrant's record so you can manage information about the presentation or special requests.

Add a registrant as an event speaker

1. On the record of the event registrant, click **Add as an event speaker** under **Tasks**. The Add a speaker screen appears.



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2. In the **Topic** field, enter the subject or title of the presentation the registrant gives.

3. In the **Date** and **Time** fields, enter when the registrant is scheduled to speak. You must schedule the presentation within the dates and times of the event.

4. In the **Comments** field, enter additional information about the registrant, such as a request to have ice water near the podium, or the presentation, such as a detailed explanation of the topic.

5. To return to the registrant record, click **Save**.

Edit Registrant Speaker Information

After you add a registrant as a speaker to an event, the Participation tab appears on the registrant record. From this tab, you can edit the speaker information, such as to reschedule the presentation.

Note: When you edit speaker information from a registrant record, you cannot edit the registrant scheduled to speak at the event.

Edit speaker information for a registrant

1. On the record of the event registrant, select the Participation tab.

2. Under **Speaker information**, click **Edit**. The Edit speaker screen appears. The items on this screen are the same as the Add a speaker screen.

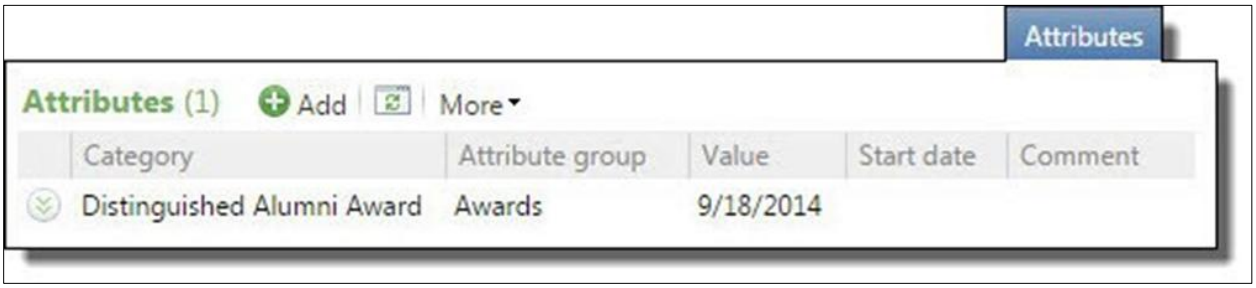
3. Edit the information.

4. To return to the Participation tab, click **Save**.

Registrant Attributes

On the Attributes tab of a registrant page, you can add multiple attributes for each registrant. Registrant attributes help you identify the qualities, characteristics, and concerns associated with a particular registrant. On the Attributes tab, you can add, edit, or delete attributes for the registrant.

Note: The Attributes tab appears only if your system administrator configured registrant attributes.



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Add Registrant Attributes

On the Attributes tab of a registrant page, you can add attributes for the registrant. The possibilities with attributes are unlimited and can be configured for the registrants of your events.

Note: The Attributes tab appears only if your system administrator configures registrant attributes.

Add a registrant attribute

1. On the Registrants tab of an event record, select a registrant under Registrants.
2. On the Attributes tab, click Add under Attributes. The Add registrant attribute screen appears.
3. In the **Category** field, select the attribute category for the attribute. Your system administrator configures the attribute categories.
4. In the **Value** field, enter or select a value or description for the attribute.
5. In the **Start date** and **End date** fields, enter the dates when the attribute is valid for the event registrant.
6. In the **Comment** field, enter additional information about the attribute.
7. To return to the Attributes tab, click **Save**.

Add Registrant Attribute Screen

Screen Item	Description
Category	Select the attribute category for the attribute. Your system administrator configures the attribute categories.
Value	Enter or select a value or description for the attribute.
Start date/End date	Enter the start and end dates when the attribute is valid.
Comment	Enter additional comments or information about the attribute.

Delete Registrant Attributes

After you add a registrant attribute, you can delete it as necessary. On the Attributes tab of a registrant record, you can select a registrant attribute to delete.

Note: The Attributes tab appears only if your system administrator configures registrant attributes.

Delete a registrant attribute

1. On the Registrants tab of an event record, select a registrant under **Registrants**. The registrant record appears.

2. On the Attributes tab, select the attribute and click **Delete**. A confirmation message appears.

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3. To return to the Attributes tab, click **Delete**.

Registrant View

When a constituent in your database is a registrant for an event or multiple events, you can open event information about the events the constituent. To view event information, from the constituent record, click **Event registrant** under **Constituencies**.



EVENT SEATING

You can set up seating for any type of event, including sporting events and dinners. Before you can assign registrants and groups of registrants to seats, you must first configure a seating layout. You can set up and determine the number of sections, rows, tables, and seats.

After you finish configuring the seating layout, you can assign registrants to seats. You can assign registrants to seats individually. You can also group registrants who request to sit together and assign each group to a section of seats. When you finish seating the registrants, you can generate a seating summary to verify the seating arrangement you created.

Configure Seating Layouts

Before you can assign participants, you must define your seating layout. On the Configure Seating Layout screen, you decide how to arrange your seating. You can set up sections, tables, and seats; sections, rows, and seats; or just sections and seats. You can determine the number of sections, tables, rows, and seats you need; and you can name your sections, tables, rows, and seats.

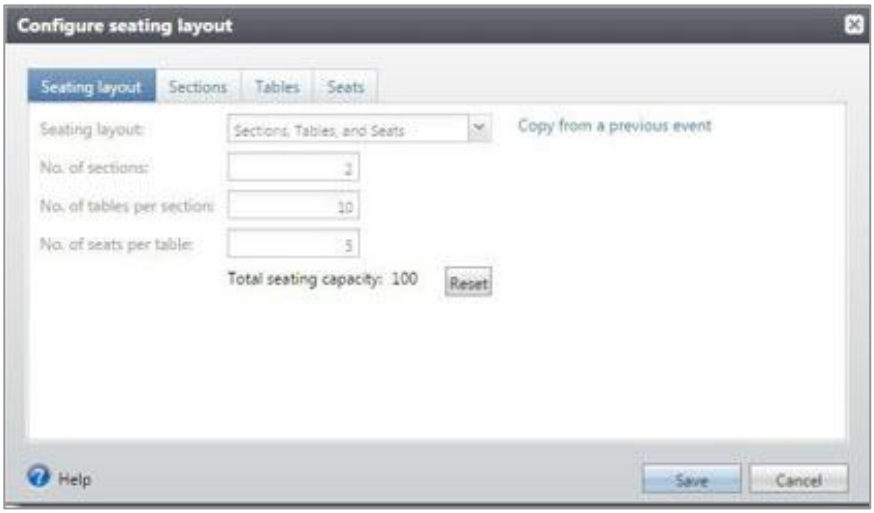
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Tip: To save time, you can copy seating layouts from one event record to another. When you copy seating arrangements, the entire structure—sections, tables, rows, seats, names, and numbers—copies over from the original event to the new event.

Configure a seating layout

1. Open the event record to configure a seating layout.
2. Click **Configure seating layout** under **Tasks** on the explorer bar. The Configure event seating layout screen appears.



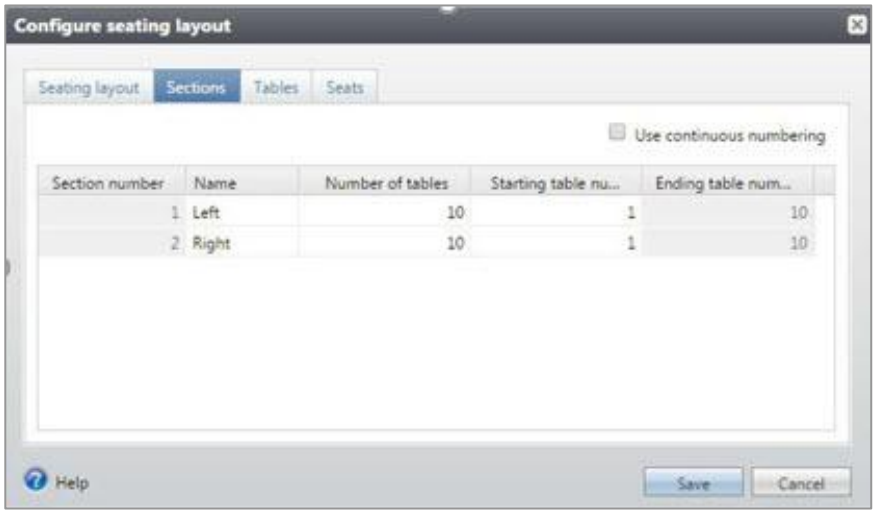
3. On the Seating layout tab, enter the necessary information in the fields. On the Seating layout tab:
    a. In the **Seating layout** field, select whether to use “Sections, Tables, and Seats,” “Sections, Rows, and Seats,” or “Sections and Seats.”
    b. In the **No. of** fields, enter the number of each sections, tables per section, and seats per table to include in the seating layout.
    c. To clear all data and start over, click Reset.

Note: You must complete the fields on the Seating layout tab before you can proceed to the Sections, Rows, Tables, or Seats tabs.

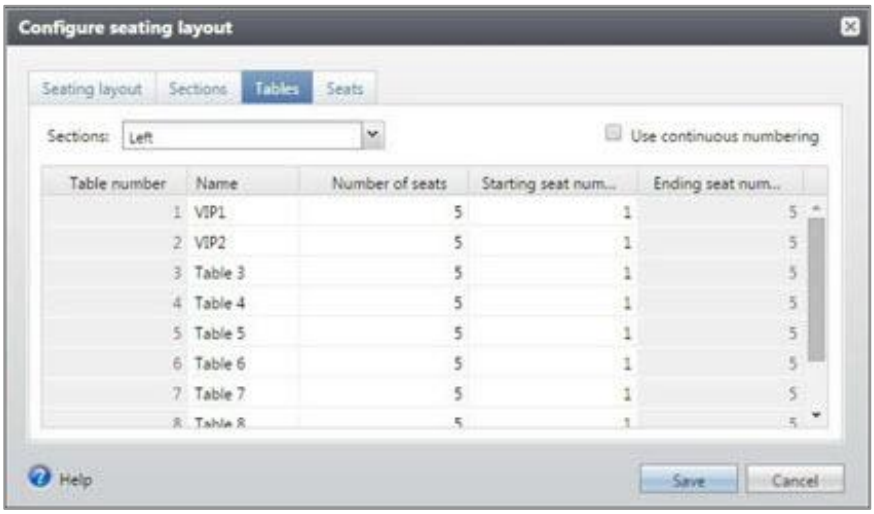
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4. On the Sections tab, enter the necessary information in the fields.



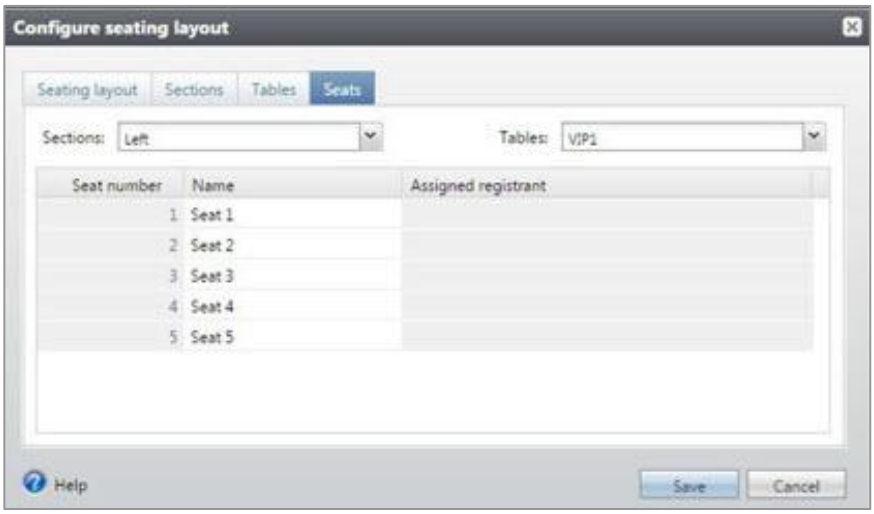
5. On the Tables or Rows tab, enter the necessary information in the fields.



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6. On the Seats tab, enter the necessary information in the fields.



7. Click **Save**.

Configure Event Seating Layout Screen

The tables below contain information about the items on this screen. There is a separate table for each tab.

Seating Layout Tab

The table below contains information about the items on this tab.

Screen Item	Description
Seating layout	Select the seating arrangement to use. You can select “Sections, Tables, and Seats,” “Sections, Rows, and Seats,” or “Sections and Seats.”
Copy from a previous event	Click this link to open a search screen to locate an event to copy a seating layout from.
No. of sections	Enter the total number of sections. Each section is made up of a specific number of tables or rows and seats. You can have only one section.
No. of tables per section	If your seating layout includes tables, enter the number of tables in each section.

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No. of rows per section	If your seating layout includes rows, enter the number of rows in each section.
No. of seats per table	If your seating layout includes tables, enter the number of seats at each table.
Total seating capacity	The **Total seating capacity** appears based on the number of sections, tables, rows, and seats.
Reset	To clear data and start over, click **Reset**.

Sections Tab

The table below contains information about the items on this tab.

Screen Item	Description
Use continuous numbering	To use the last table number of the previous section as the starting point when numbering the next section, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first table in each section begins numbering with "1."
Selection number	The **Section number** column displays the number assigned to each section for which you selected tables and seats.
Name	Enter a unique name to identify each section. If you choose not to enter a name, the default name "Section" and the appropriate number displays.
Number of tables or Number of rows	If your seating layout includes tables or rows, the **Number of tables** or **Number of rows** column displays the total number of tables or rows in each section.
Starting table number or Starting row number	If your seating layout includes tables or rows, the **Starting table number** or **Starting row number** column displays the starting number of the first table or row of each section. To continue numbering from the previous section, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first table or row in each section begins numbering with the value "1."

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Ending table number or Ending row number	If your seating layout includes tables or rows, the **Ending table number** or **Ending row number** column displays the number of the last table or row in each section. The number that displays is based on whether you select **Use continuous numbering**.

Tables or Rows Tab

The table below explains the items on this tab.

Screen Item	Description
Sections	Select a section, row, or table to view table, row, or seat information.
Use continuous numbering	To use the last seat number of the previous table or row as the starting point **Use continuous** when numbering the next table, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first seat at each table or row begins numbering with "1."
Table number or Row number	If your seating layout includes tables or rows, the **Table number** or **Row number** column displays the number of each table or row. The table or row number is based on whether you selected **Use continuous numbering** on the Sections tab.
Name	Enter a unique name to identify each table or row. If you choose not to enter a name, the default name "Table" or "Row" and the appropriate number displays.
Number of seats	The **Number of seats** column displays the total number of seats included at each table or in each row.
Starting seat number	The Starting seat number column displays the starting number of the first seat at each table. To continue numbering from the previous table, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first seat at each table begins numbering with "1."

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Ending seat number	The **Ending table number** column displays the number of the last seat at each table. The number that displays is based on whether you select **Use continuous numbering.**

Seats Tab

The table below explains the items on this tab.

Screen Item	Description
Sections, Rows, or Tables	Depending on your seating layout, select a section to view table, row, or seat information.
Seat number	The **Seat number** column displays the number assigned to each seat. The seat number is based on whether you selected **Use continuous numbering** for the section, table, or row.
Name	Enter a unique name to identify each seat. If you choose not to enter a new name, the default name “Seat” and the appropriate number displays.
Assigned registrant	The **Assigned registrant** column displays the name of the registrant assigned to the seat.

Copying Seating Layouts

To save time, you can copy seating layouts from one event record to another. When you copy seating arrangements, the structure—sections, tables, rows, seats, names, and numbers—copies over from the original event to the new event. When you use continuous numbering on the original event record, the continuous numbering sequences copy to the new event record.

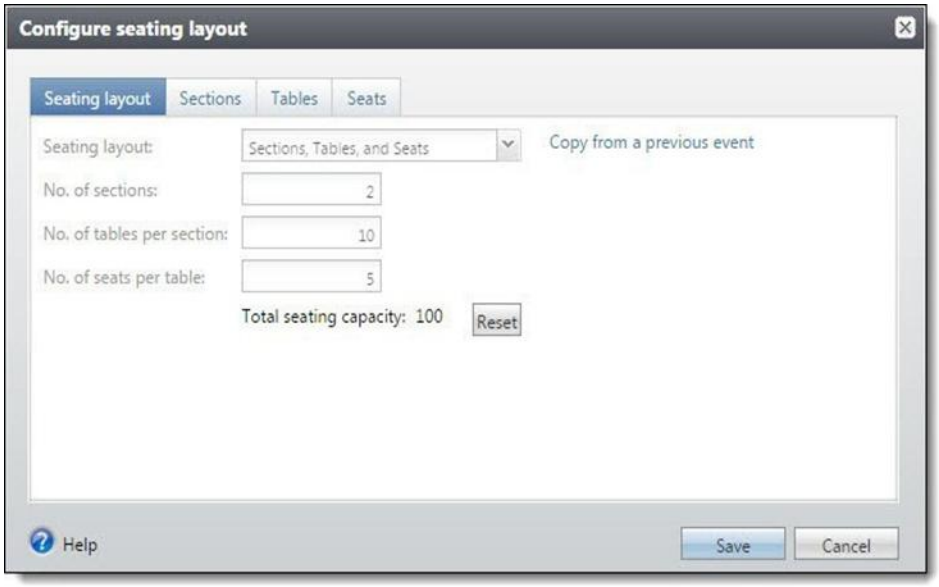
Copy a seating layout from another event

1. Open the event record to configure a seating layout.
2. Click **Configure seating layout** under **Tasks** on the explorer bar. The Configure seating

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layout screen appears.



3. Click **Copy from a previous event**. The Event Search screen appears.

4. To copy a layout from a previous event, locate the event and click **Select**. You return to the Configure seating layout screen, which now displays the event seating information.

5. Click **Save**.

ASSIGN SEATS

After you configure seating layouts, you can assign registrants to seats. You can assign participants to seats individually, and you can group participants who request to sit together and assign each group to a section of seats.

Seating Screen

The seating screen is divided into the **Registrants** frame, the **Groups** frame, and the **Seating** frame. The tables below explain the items on this screen.

Registrants Frame

The **Registrants** frame displays the names of the registrants and guests added to the event from the Registrants tab of the event record. The table below explains this item in this frame.

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Screen Item	Description
Assign to section/ table/row/seat	To assign a registrant to a section, table, row, or seat, select the registrant and the table and, in the **Registrants** frame, click **Assign to []**.
Add to group	To add a registrant to a group, select the registrant and the group. In the Registrants frame, click **Add to group**.
Show	To filter the registrants, select one of the following: “All registrants,” “Seated registrants,” “Unseated registrants,” “Grouped registrants,” “Ungrouped registrants,” “Ungrouped & unseated registrants,” or “Registrants with guests.”
Name	The **Name** column displays the name of each registrant.
Host	The **Host** column displays the name of the registrant of whom the selected registrant is a guest. When the registrant is a guest of no one, the **Name** column and the **Host** column display the selected registrant’s name.
Group	When the registrant is part of a group, that group name appears here. You can add registrants through the Groups tab of an event record or on the seating screen.
Guest count	The **Guest count** column displays the number of guests each registrant brings to the event. When the registrant does not have any guests, “0” displays in this column.
Seat	After you assign the registrant to a seat, the full seat location (including assigned section, table, or row) displays in this column.
Seating note	The seating note column displays additional comments about seating. You enter seating notes in the **Seating note** field of the Edit registrant or guest screen, or you may enter seating notes at the time of registration by clicking the Notes and Tags button on the registration screen. For example, if a guest registrant needs to be seated by his wife who is also a registrant, you can indicate this with a seating note.

Groups Frame

In the **Groups** frame, groups you create for the event appear. You can also create a group for participants to sit together. After you create and name a group, you can add participants to it. You can

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then assign the group to a section, table, or row in the **Seats** frame. The table below explains the items in this frame.

Screen Item	Description
Add	To create a new group of registrants, click **Add**. The Add event group screen appears. When you add a group on the Seating screen, it is added to the Groups tab for the selected event as well.
Edit	To edit a group of registrants after you add them, select the group to edit and click **Edit**. The Edit event group screen appears.
Delete group	To delete a group of registrants, select the group and click **Delete group**. This deletes this group from the event, not just from the seating layout.
Assign to [x]	To assign a group to a section, table, or row, select the group and the destination and, in the **Groups** frame, click **Assign to [x].**
Remove registrant	To remove a registrant from a group, select that registrant in the **Groups** frame and click Remove registrant. This removes the registrant from the group but does not affect the registration for this registrant.

Seats Frame

In the Seats frame, you can view each section, and the tables, rows, and seats underneath each section. To expand a section, table, or row, click the plus sign. The table below explains the items in this frame.

Screen Item	Description
New section/table/row/seat	To create an item, select an existing item and click this button. A new item is added to the item list you selected.
Delete section/table/row/seat	To delete a section, table, row, or seat, select it and click this button. This item is deleted.
Up/down arrows	Click the arrows to move a section, row, table, or seat up or down on the seating screen.

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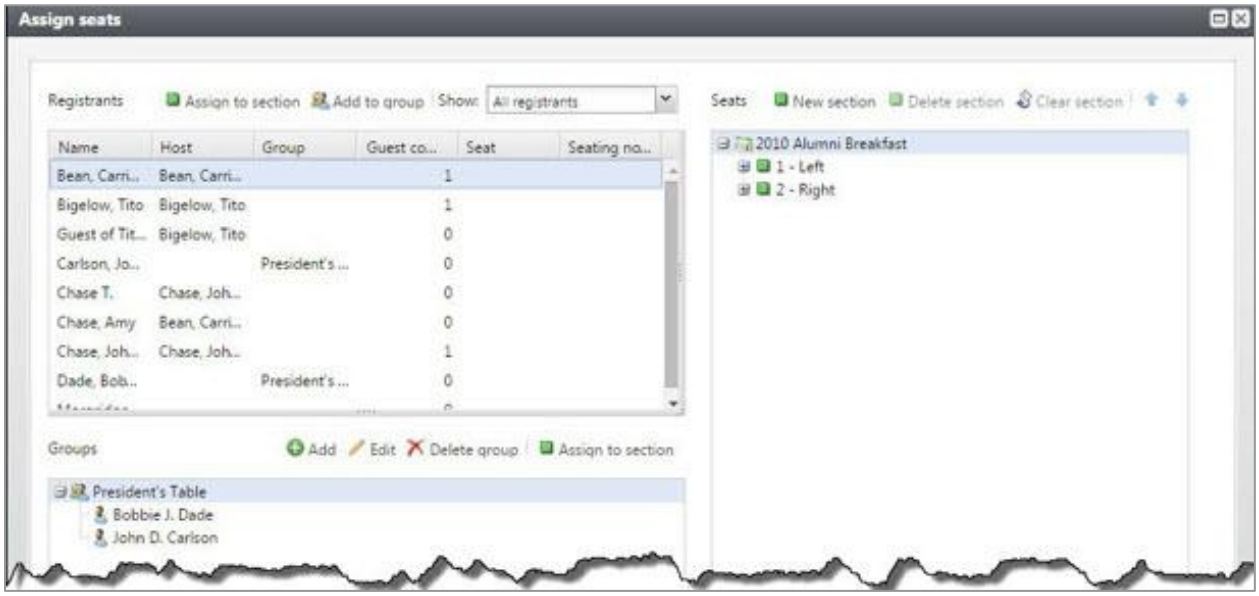
Assign Individual Registrants to Seats

From the **Registrants** frame of the seating screen, you can assign each registrant to a seat at a table or row within a section.

Note: When you assign registrants to a section, table, or row, a warning message appears when there are not enough seats to accommodate a registrant. A screen alerts you and asks if you want to add seats. To add a seat, click **Yes**. When you click **No**, no one is assigned to a seat.

Assign a registrant to a seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.



2. Under **Registrants**, select a registrant. In the Seats frame, select a seat.

3. Click **Assign to seat []**. The registrant is assigned to the seat. You can assign registrants to seats or just to specific tables, rows, or sections. When you assign a registrant to a section, table, or row, that registrant is assigned to the first available seat in that section, table, or row.

Note: After you select a registrant under **Registrants**, you can also click and drag the registrant to a seat, or you can right-click and select to assign the registrant to a seat.

4. To return to the event record, click **Save**.

Assign Multiple Registrants to Seats

From the **Registrants** frame of the seating screen, you can assign multiple registrants to seats or a table or row within a section. This procedure shows you how to drag and drop multiple registrants from the

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Registrants frame to the **Seats** frame. You can also select multiple registrants in the **Registrants** frame and use the **Assign to** button on the action bar to assign registrants to the **Seats** frame.

Note: When you assign registrants to a section, table, or row, a warning message appears when there are not enough seats to accommodate a registrant. A screen alerts you and asks if you want to add seats. To add a seat, click **Yes**. When you click **No**, no one is assigned to a seat.

Assign multiple registrants to seats

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. To assign multiple registrants, hold down the **SHIFT** key and in the **Registrants** frame, select the appropriate registrants. In the **Seats** frame, select a section, table, or row.

Note: After you select registrants under **Registrants**, you can click and drag them to a row or table and assign them to the selected row or table, or you can right-click and select to assign them to a selected row or table.

3. Click **Assign registrant to** []. The registrants are assigned to the seats in the section, table, or row you selected.
4. Click **Save**. You return to the event record.

Reassign Registrants to Different Seats

If you determine you need to place the registrant somewhere else after you assign a registrant to a seat, you can reassign the registrant to another seat.

Tip: To save time, in the **Seats** frame, click on a registrant and drag them to a different seat to automatically reassign the registrant to a new seat.

Remove a registrant and assign to another seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, click the seat to reassign.
3. Select **Remove registrant**. The registrant is removed from that seat.
4. To assign the registrant to a different seat, select the seat under **Seats**.
5. Under **Registrants**, select the registrant and click **Assign to seat**.
6. To return to the event record, click **Save**.

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Clear Seat Assignments

After you assign participants from the **Registrants** frame to the **Seats** frame, you can clear your seating assignments. You can also clear seating assignments when you have assigned groups from the **Groups** frame to the **Seats** frame.

Clear seating assignment

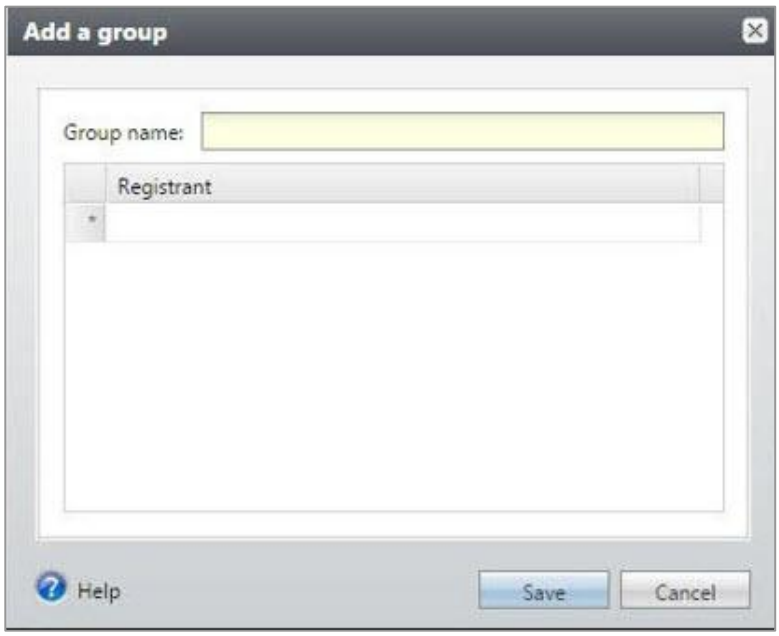
1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, click on the event name.
3. Select **Clear section**. Seating assignments disappear from your seating arrangement in the **Seats** frame. You can now assign registrants to seats again.
4. To return to the event record, click **Save**.

Assign Registrants to Groups

When participants register for an event, they may often request to sit with other registrants. To accommodate your registrants' wishes, you can create named groups. After you create a named group and add registrants to the group, you can assign the entire group to seats at the same table or row within a section.

Assign registrants to a group

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. When groups already exist for an event, they appear under **Groups**. If a group does not already exist, click **Add**. The Add a group screen appears.



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3. Enter and save information to create the group.

Note: You can add, edit, or delete a group from the Groups tab of the event record. Groups you create through the seating screen are added to the grid on the Groups tab.

4. Under **Groups**, click the icon beside the group name to highlight it.
5. Under **Registrants**, select a registrant.

Tip: To assign multiple registrants to a group, hold down the **SHIFT** key in the **Registrants** frame, select the registrants.

6. Click **Add to group**. The registrant now appears with the group under **Groups**.

Tip: To add a registrant to a group, you can also click a registrant name in the **Registrants** frame and drag it to a group in the **Groups** frame. To add multiple registrants, hold down the **SHIFT** key and in the **Registrants** frame, select the registrants and drag them to a group in the **Groups** frame.

7. To return to the event record, click **Save.**

Assign Groups to Seats

After you create a named group and add registrants to the group, you can assign the entire group to seats at the same table or row within a section.

Note: A warning message appears if there are not enough seats within a section, table, or row to accommodate any or all registrants within the group when you assign it to a section, table, or row, . A screen alerts you if enough seats are not available and asks if you want to add seats. To add a seat, you click **Yes** and additional seats are added to accommodate the registrants in the group. When you click **No**, the group is not assigned to seats.

Assign a group to seats

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.

2. Under **Seats**, select a section, table, or row to which to assign the group.

3. Under **Groups**, select a group and click **Assign to section**. The registrants in the group now appear next to the seats in the section, table, or row under **Seats**.

Tip: To assign a group to seats, click a group name under **Groups** and drag the group to a section, row, or table in the **Seats** frame.

4. To return to the event record, click **Save**.

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Add Sections, Rows, Tables, or Seats

On the seating screen, you can add additional sections, rows, tables, or seats to the seating layout as needed. For this example, we will add a row to a section, but the same steps apply when you add new sections, tables, or seats.

Add a section, row, table, or seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, select a section to add a row and click **New row**. A row appears in the section.
3. To return to the event record, click **Save**.

Rename Sections, Rows, Tables, or Seats

On a seating screen, you can rename sections, row, tables, or seats to the seating layout as needed. For this example, we will rename a section, but the same steps apply when you rename a table, row, or seat.

Rename a section, row, table, or seat

1. On the event record, click **Configure seating layout** under **Task.** The Configure seating layout screen appears.
2. On the Sections tab, click on the section to rename.
3. Select the name of the section in the name column that you rename. The section name becomes editable.
4. Enter the name for the section.
5. To return to the event record, click **Save**.

Delete Sections, Rows, Tables, or Seats

On the seating screen, you can delete sections, rows, tables, or seats from the seating layout as needed.

Warning: Deleting sections, rows, tables, or seats actually changes your seating layout. To remove a registrant from a table, but not remove that seat from your table, you can reassign that registrant to another seat.

Delete a section, row, table, or seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, select the section, row, table, or seat to delete and click **Delete [ ]**. A confirmation message appears.
3. To delete the selection, click **Yes**.

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4. To return to the event record, click **Save**

EVENT SEATING GROUPS

You can create groups of registrants who want to be seated together for an event. From an event, click **Assign seats** under **Tasks**. On this screen, you can add, edit, and delete event seating groups. For example, you might add a family of registrants to a group for an upcoming dinner event. You then use the groups to seat people in a single action on the seating screen.

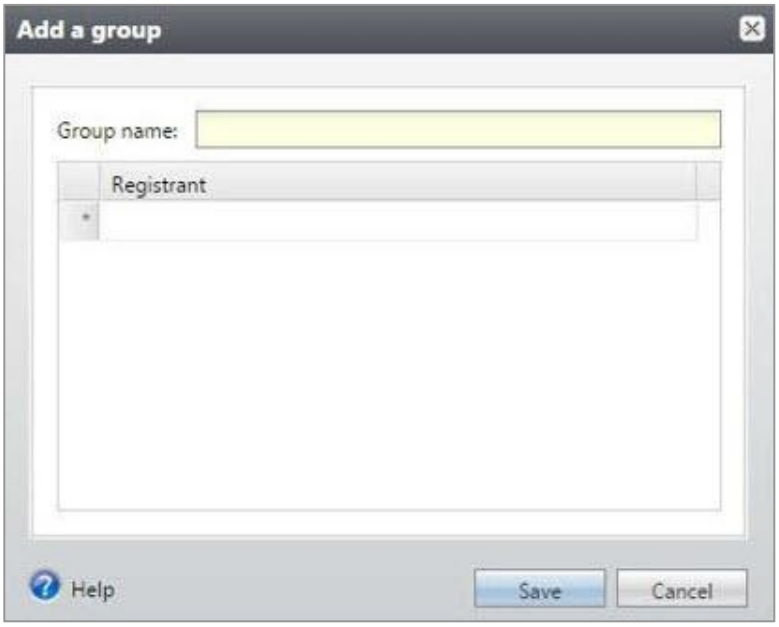
Add Event Seating Groups

You can create groups of registrants for an event. From an event, click **Assign seats** under **Tasks**. On this screen, you can add, edit, and delete event seating groups. You then use the groups to seat people in a single action on the seating screen.

Note: Before you can designate a constituent as a member of an event seating group, you must first add the constituent as a registrant for the event.

Add an event seating group

1. On the event record, click **Assign** seats under **Tasks**. The Assign seats screen appears.



2. Under **Groups**, click **Add**. The Add a group screen appears.

3. In the **Group name** field, enter text to identify the group.

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4. In the **Registrant** column, select a row. To locate a registrant to add to the group, click the binoculars.

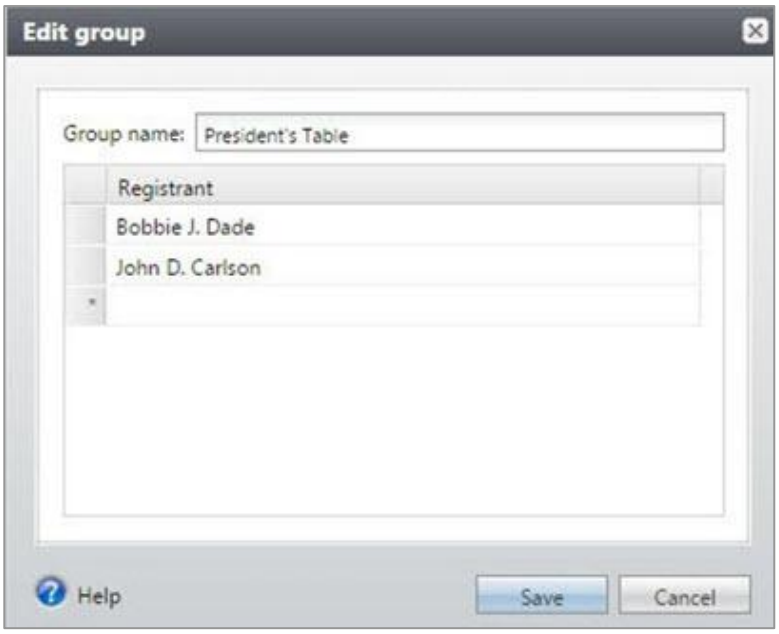
5. Click **Save**.

Edit Event Seating Groups

After you add seating groups, you can edit details for the group as needed. On the Assign seats screen for an event, you can select a seating group to edit. You can create groups for an event. From an event, click **Assign seats** under **Tasks**.

Edit an event seating group

1. From an event, click **Assign seats** under **Tasks**. The Assign seats screen appears.
2. Under **Groups**, select the seating group to edit and click **Edit**. The Edit group screen appears.



3. Edit the seating group's name or its registrants. To locate a different registrant, or to add a registrant to the group, click the binoculars to locate the correct registrant.

4. Click **Save**.

Delete Event Seating Groups

After you add event seating groups, you can delete groups as needed. On the Assign seats screen for an event, you can select a seating group to delete.

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Note: When you delete a seating group, you delete only the group and not the registrants assigned to the group.

Delete an event seating group

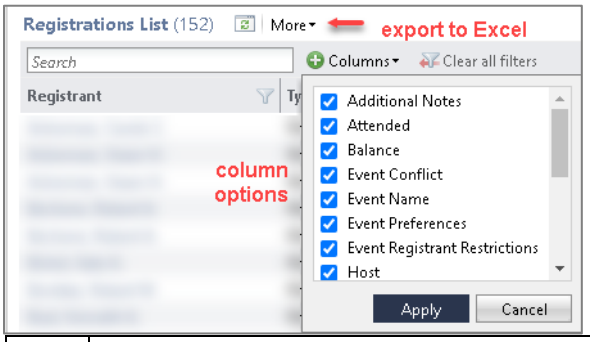
1. From an event, click **Assign seats** under **Tasks**. The Assign seats screen appears.
2. Under **Groups**, select the seating group and click **Delete**. A confirmation message appears.
3. Click **Yes.**

LIST BUILDER AND EVENT REPORTS

Registration List Builder

The Registration List Builder is available to customize and export current registration data with the ease of simply selecting and exporting the data to Excel. There is no need to run a report nor is there a need to wait overnight for the data to come over from the warehouse into a UI Report. The Registration List Builder is available on the event registration tab, below the list of registrations and it is labeled "Registrations List".

The Registration List Builder allows you to export **live** data with the option to customize the columns of information selected. The options include the custom data entered during the registration process: Preferences, Name Tag information, Seating Notes and Additional Notes.



Follow these steps to use the **Event Registration List Builder**:

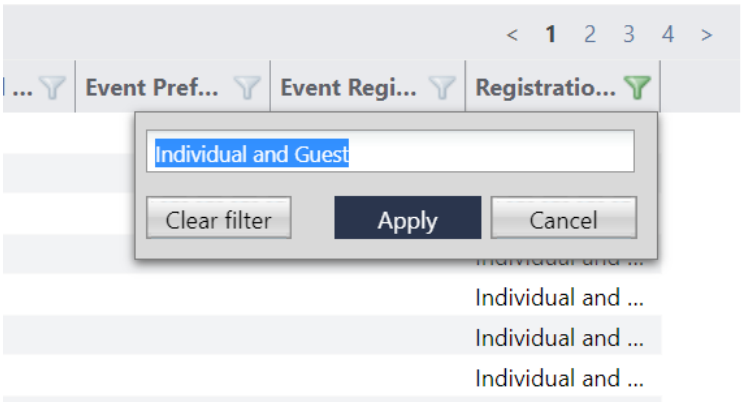
Step	Task
1.	Locate the correct **Event** record in TED.
2.	Scroll down to the **Registrations List.**
3.	Choose the **Columns** button.
4.	Select the Columns of data that you would like to see in your list.
5.	Click **Apply**. The List Builder will run and the columns you selected will appear.
6.	To export your customized List to click the More button and choose your preferred platform to which to export the data.

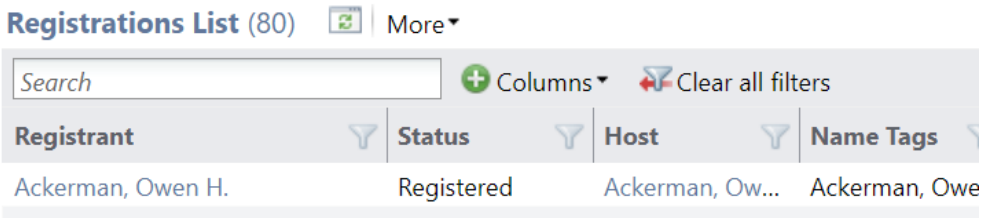
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Additionally, you may **filter the Columns** in the List Builder to help you find specific information. For example, if you wanted to see only people who registered with a guest, you may click the funnel button next to the column heading that you would like to filter and then type in variable you would like to see, then click Apply. The data will then filter out the registrants that do not meet your filter requirements.

To undo these filters, simply click the **Clear all filters button**.



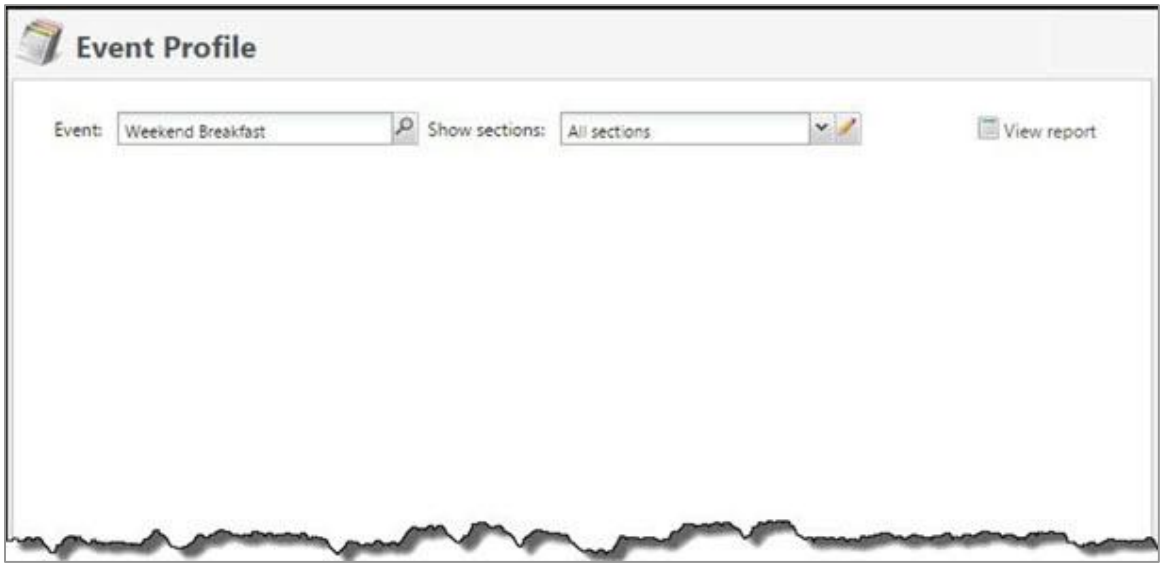


Event Profile Report

With the Event Profile report, you can view information about an event, such as its coordinators, location, seating, expenses, and more. The Event Profile report also includes information about event registrants, such as date registered, host, and balance.

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View an event profile report

1. On an event record, click **Event profile** under **Reports**. The Event Profile report page appears.

Note: To view the Event Profile report from *Events*, click **Event profile** under **Reports** and search for and select the event to generate its report. To view the report from *Analysis*, click **Event reports** and **Event profile**, and search for and select the event to generate the report.

2. In the **Event** field, select the event to view information.

Note: The invited count in the **Event Details** section of this report is based on the number of invitees in the Invitee list of the event's Invitations tab.

3. In the **Show sections** field, select the types of information to display in the report.

Tip: When you select **Event Details**, the report displays detail information about the event and its registrants, including the number of constituents that were invited to the event but did not register. To display a list of the constituents that did not respond to an invitation, select **Did not respond**. From this list, you can open the record of a constituent who did not respond.

4. Click **View Report**. The Event Profile report generates and displays the information.

EVENT SUMMARY REPORT

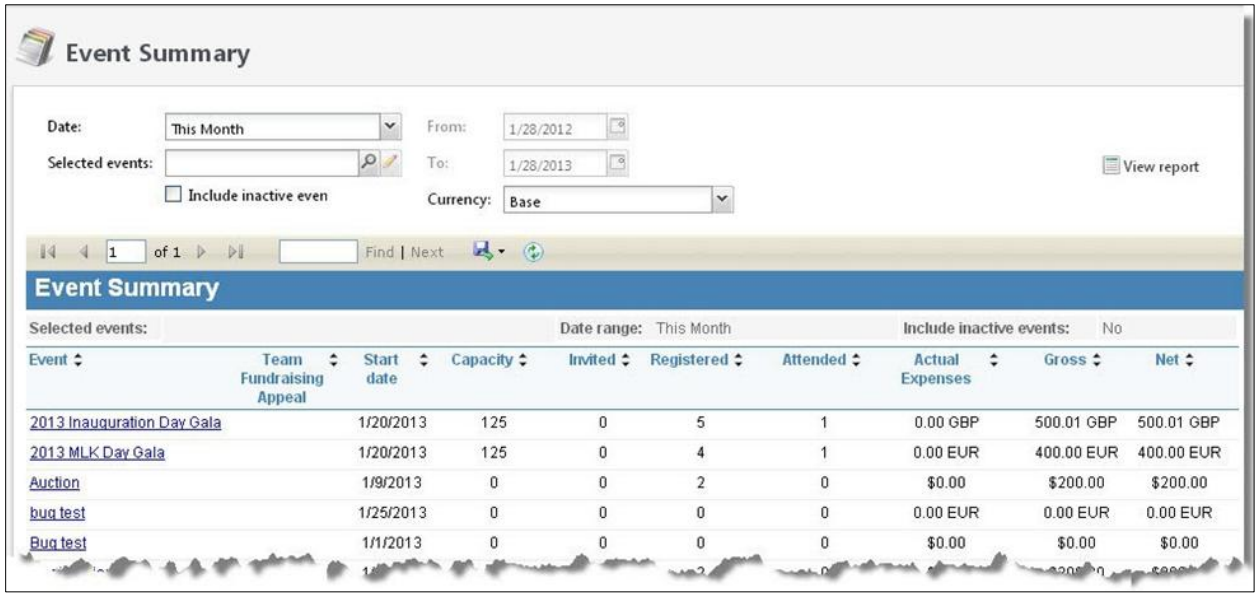
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With the Event Summary report, you can view information about multiple events, based on a selection, along with the event details. The Event Summary Report includes information about the event such as the start date, how many people were invited/registered/attended, event income and expense information, and more.

View an event summary report

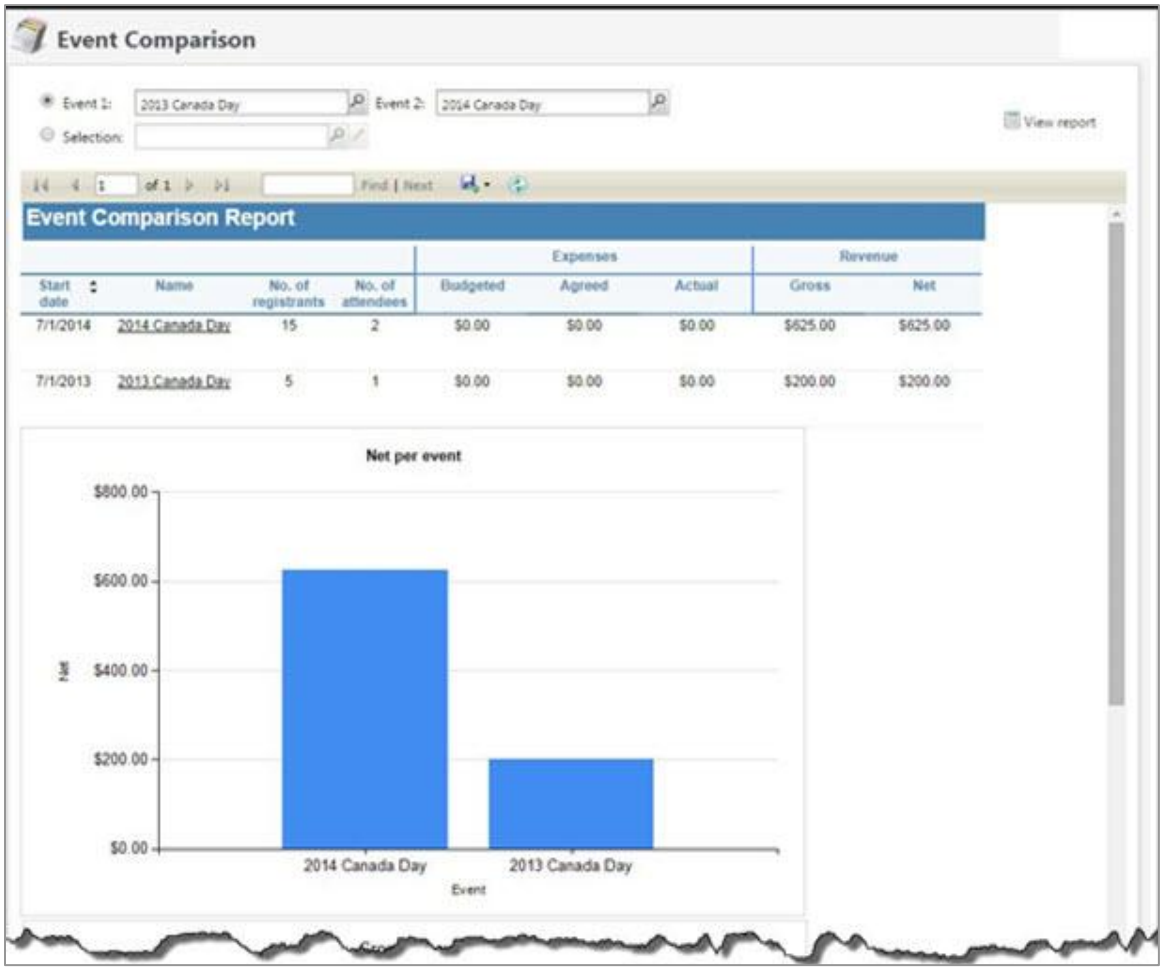
1. From *Reports*, select Event reports.
2. Click **Event summary**. The Event Summary Report page appears.
3. At the top of the page, click the magnifying glass to pick a selection of events to include. You can also select a date range and whether or not to include information about inactive events.
4. To view the report, click the refresh button. The Event Summary with the selected information appears.



EVENT COMPARISON REPORT

The Event Comparison report compares the effectiveness of multiple events. For example, you can use this report to compare the effectiveness of an annual event over consecutive years. To open the Event Comparison report from *Events*, click **Event comparison** under **Reports**. The Event Comparison report page appears.

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To run the report, select two events or a selection of multiple events to compare and click **View Report**. The report compares the performance of the selected events and displays the number of registrants and attendees, expenses, and the gross and net amounts raised for each event.

For events with a team fundraising appeal and fundraising teams, you can view additional charts to compare team fundraising effectiveness. For each event, you can view the number of teams and the total raised by each team and collectively. The report also generates charts to compare the income raised by each event and the average amount raised per team for each event.

Note: The **Average Amount Raised Per Team** comparison includes only donations associated with an event's team fundraising appeal and solicitors.

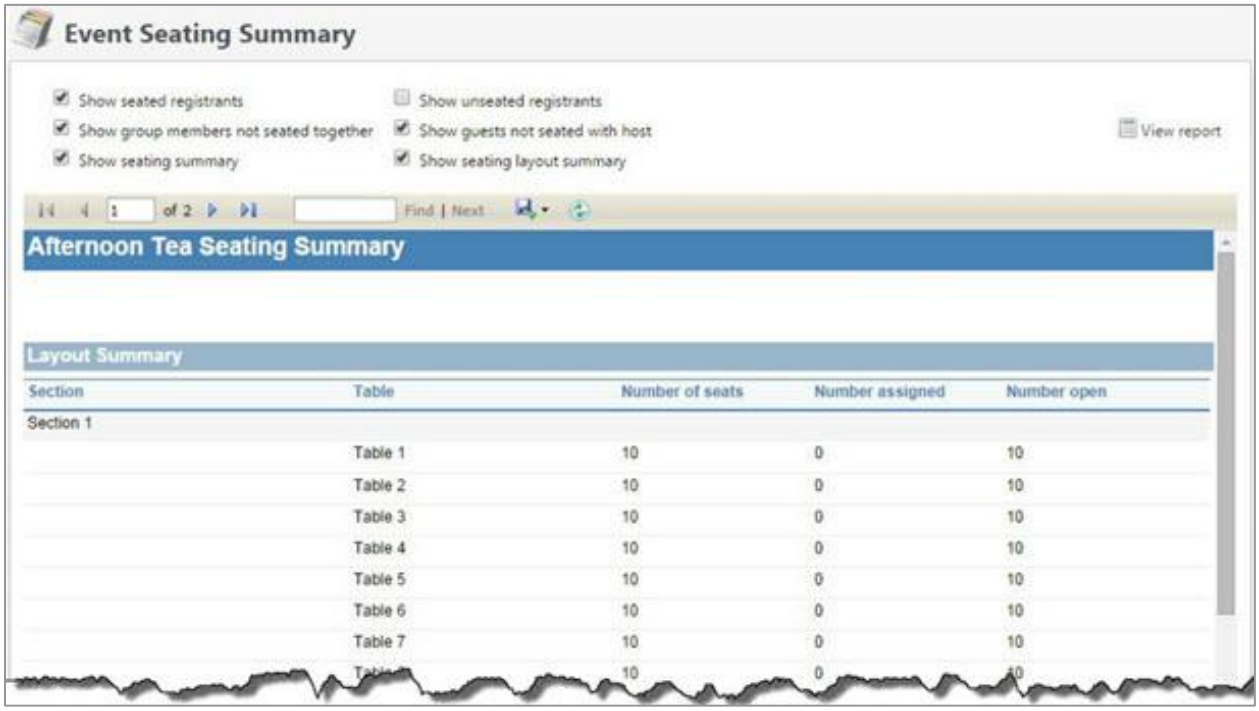
You can print the report or export it in different formats.

SEATING SUMMARY REPORT

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With the Seating Summary report, you can view information about how you seated registrants for a specific event. You can run a report to determine which registrants have been seated or not, which group members are not seated together or with their host, and you can view an overall seating summary and seating layout summary.



View an event seating summary report

1. Locate the event to generate an event seating summary report.
2. Click **View seating summary** under **Tasks**. The Seating summary page appears.
3. At the top of the page, select the information to include on the report, such as **Show seated registrants** and **Show unseated registrants.**
4. To generate the report, click **View report**. The seating Summary report with the information you selected appears.

REVIEWED 5/8/24

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CVENT

EVENT REQUEST FORM EXPLANATION

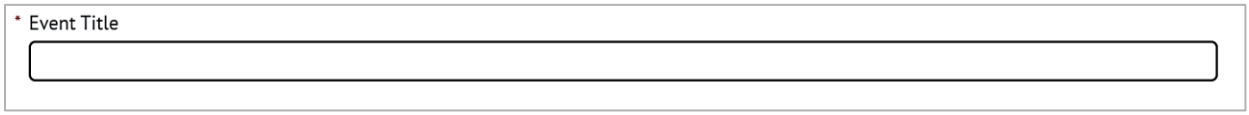
Note: Please be aware that only events with an advancement purpose can utilize the following process through UIF.

1. Login to TED and navigate to the events module.
2. Create your TED event. Training documents are in iLearn for this process (iLearn.uif.uillinois.edu).
3. Go back to TED, and under the events module click on the event
4. On the left side bar, click on the "Cvent Event Registration Page Request" link
5. You will be directed to the meeting request form which is explained below.

Event Information

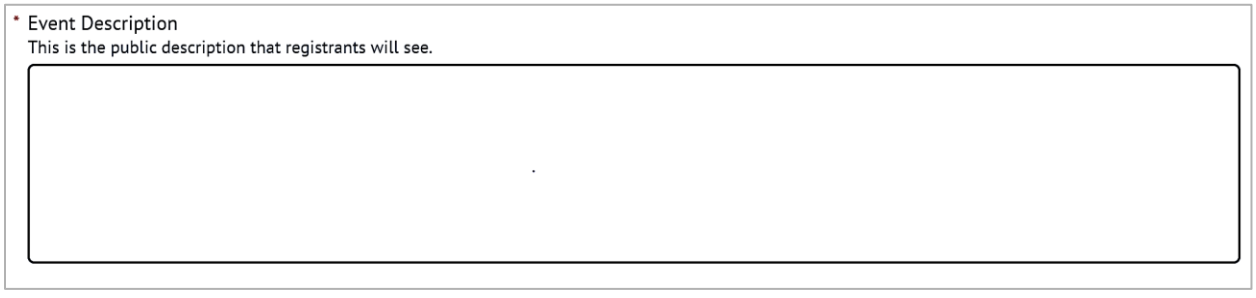
***Note*: A TED Event must be created prior to submitting this form.**

Please provide the exact information, as listed in TED.



Add the event title as listed in the event created in TED.

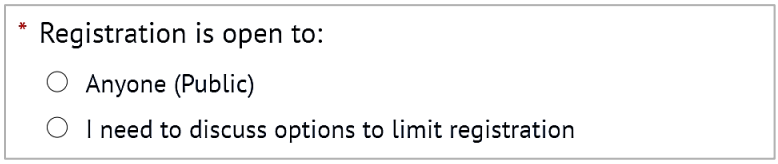
This description will be seen by the registrants as all those who visit the site.



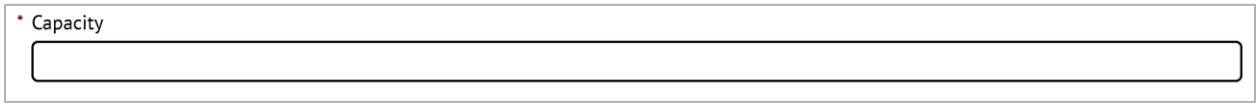
Specify who can attend the event. If you need to limit registration, you will be contacted to discuss further.

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Maximum capacity should be indicated here.



The registration deadline is the date all registrants must register. On this date, the registration page will be closed, but those interested can still contact the event planner.



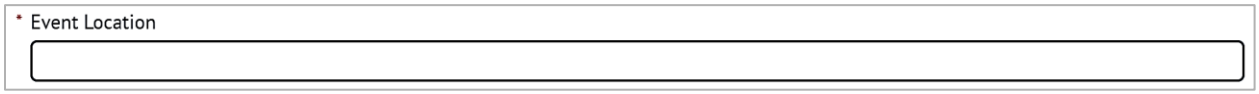
The event start date and time must be listed.



The event end date and time must be listed.



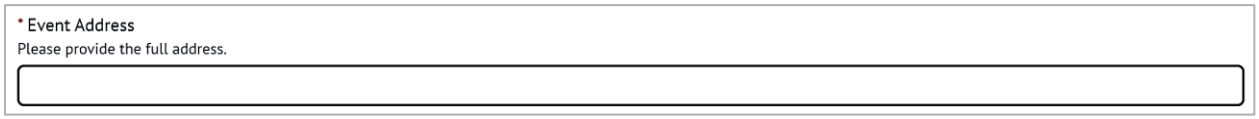
The location is the name of the venue where the event will be held. Type in remote if the event does not have a location.



Provide the full address of the venue which will be listed for registrants. Once again, type in remote if the event does not have a location.

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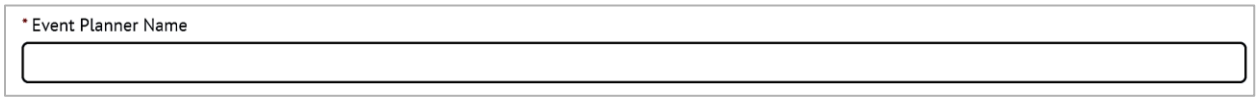
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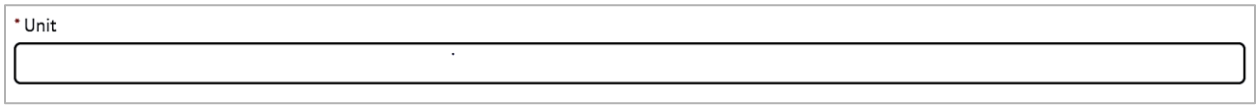
Event Planner

The Event Planner section should list information that will be presented to the registrants. This information will function as the 'sent from' address for all email communications and is the outward facing planner to registrants.

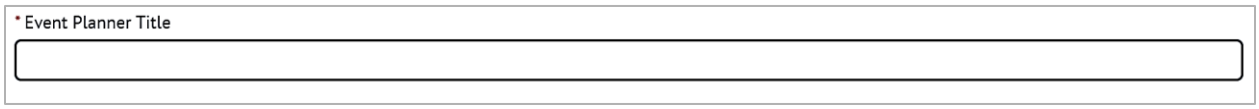
The event planner's name is the name you want the registrant to see. This can be the name of an individual OR a unit.



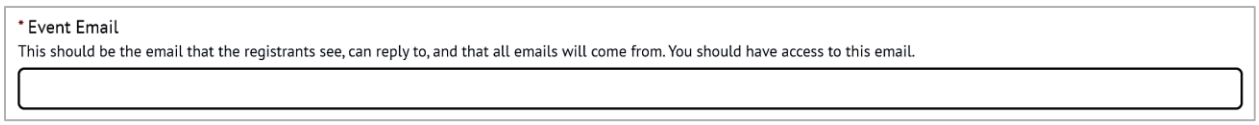
Provide the unit requesting the event (even if listed in the previous question).



You can include the planner's title here.



Email needs to be one that you have access to, and will be the address that all event emails will be sent through CVENT.



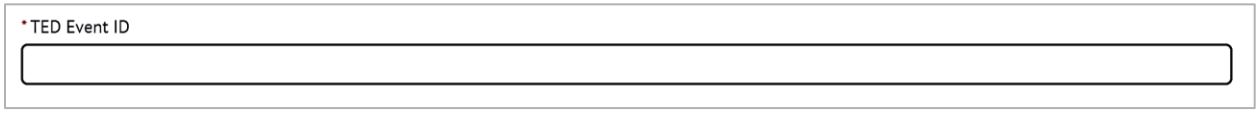
TED Information and Event Details

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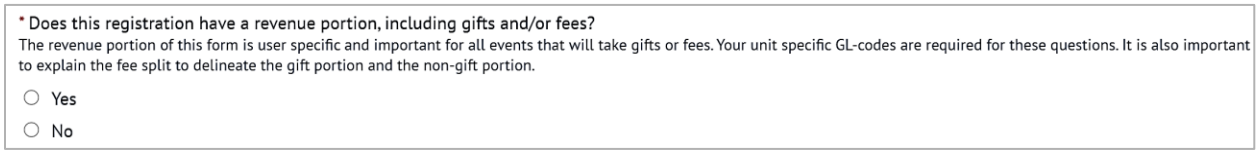
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The TED Information section requires the TED event ID to be added. For UIF to create the event, your TED event must be created prior to submitting the Meeting Request Form.

The Event Lookup ID can be found on your TED event page. Please enter the full ID.



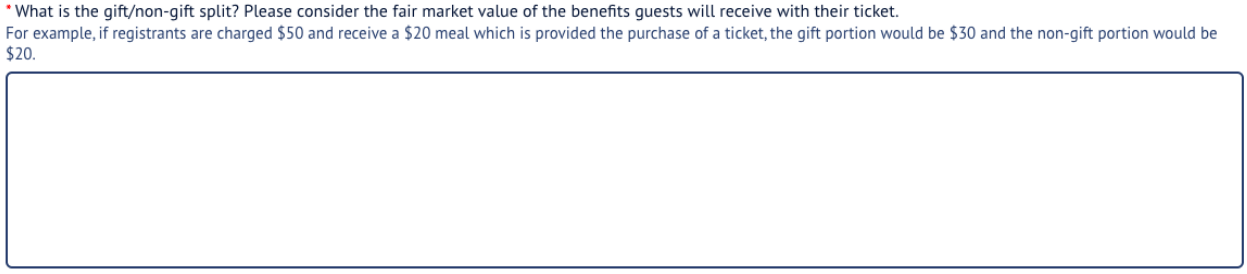
Revenue includes both gift and non-gifts transactions. If your gift doesn't have a revenue portion, you will click no and move on to the next question.



If your event does have a revenue portion, the gift and non-gift funds are your unit's specific UIF Banner funds. Note: These must be UIF funds.



Provide a 1-2 sentence overview to aide in understanding how the fee is split directly below. Further details will be included in the questions below. Often a split is done to reflect the market value of a meal or other item and the rest of the admissions item or sponsorship is allocated to the gift fund. The fees can be split in any way. There is an example present in the description of the section. If there are questions about the benefits, please email UIFSpecialEvents@uif.uillinois.edu.

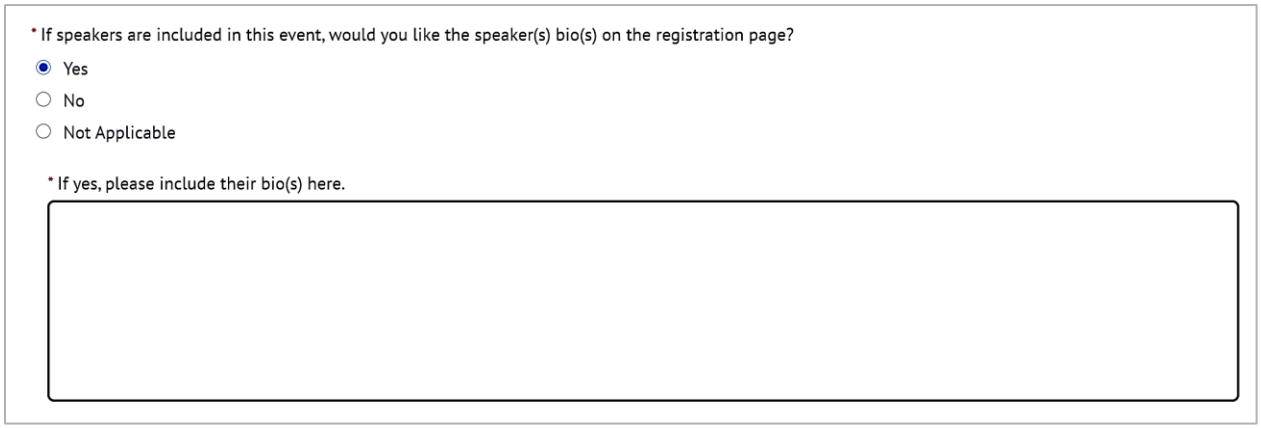


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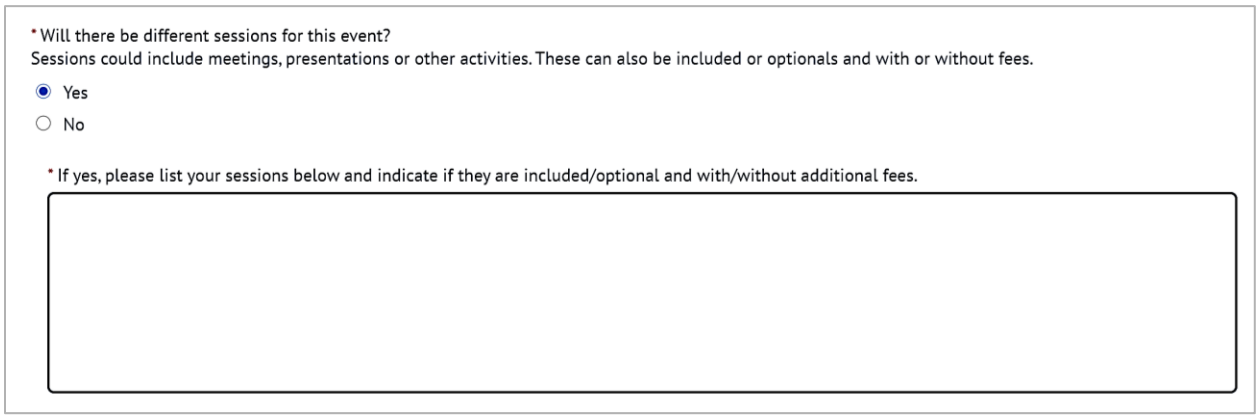
Only events that have a clear advancement purpose can have event registration pages created by UIF in Cvent.



If speakers are included, provide the bios for any you would like included on the registrant page.



If sessions are included in this event, all session details (including additional pricing if applicable) should be included. If sessions are only available for certain groups, that should also be noted. Events without sessions will mark no and move on to the next set of questions.



Hotel links can be provided to display to registrants. Include the hotel address, name, and hotel website link.

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If you would like to provide a hotel link on the event website, please include here:

Admission Items & Registration Types

This section details the pathway registrants will take. If all registrants are treated in the same way and the cost for each registrant is the same, no registrant types will be required but a single admission and should be detailed in the first section.

Admission items are equivalent to a ticket in the event. Registrants can choose 1 and ONLY 1 admission item. If there are different "tickets" for the event (different fees for different people or groups), please indicate them here with the pricing structure. Different people and groups could include speakers, exhibitors, and attendees.

* Please list all admission items here with the pricing for each. Please detail the fee including any discounts, early bird pricing, and refund policies. If early bird pricing of refunds are included, provide the dates that correspond with each (i.e. when the early bird pricing closes or when the refund ability closes).

Should registration types be required, they should correspond with the invitation list created (that will be given to annual giving). This allows for TED and CVENT to crossmatch the registrants.

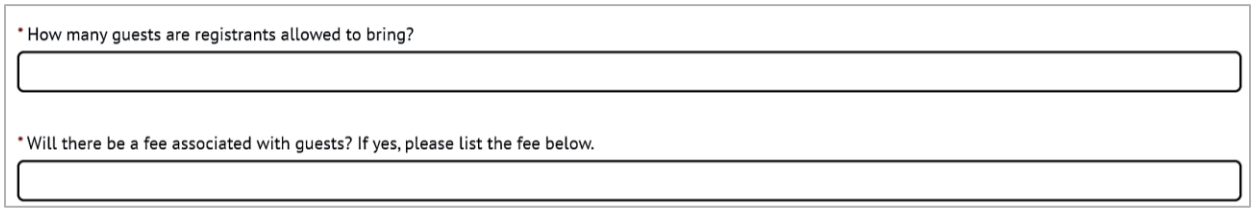
Registration types determine what different groups of people can see during registration, what they can select and how much these items cost. Registrants can only have one Registration Type per event. If price is the only difference for individuals or groups, then a separate admission item is needed, and a registration type is not.

* Please provide all registration types, as listed in TED, you would need included in this event. Each registration type should have an explanation about the pathway and how it distinctly differs from the other registration type(s).

Provide a number between 0 and 10. If there is an additional fee associated with guests, please detail that below.

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Event Website & Registration

The Event Website & Registration section contains optional questions that pertain to custom questions and images to be integrated into the event registration homepage. Please attach any images you would like included in the event. For header images please label Header. For any other images you wish to be included, a compact slideshow can be displayed on the event summary page. Please label those images Slideshow.

Please provide any graphics to be included in the registration page. This includes headers, individual photos, links to videos, menus etc. Suggested image sizes are listed here. It is strongly suggested that the guidelines be followed.

Suggested Image Dimensions for Cvent

- Header Background: 1920px wide
- Email Header: 600px x 150px
- Logo Images: 190px x 80x
- Speaker Images: 300px by 300px



Color scheme templates are provided for each of the different campuses. Specific HEX values can also be provided here rather than the template color schemes.

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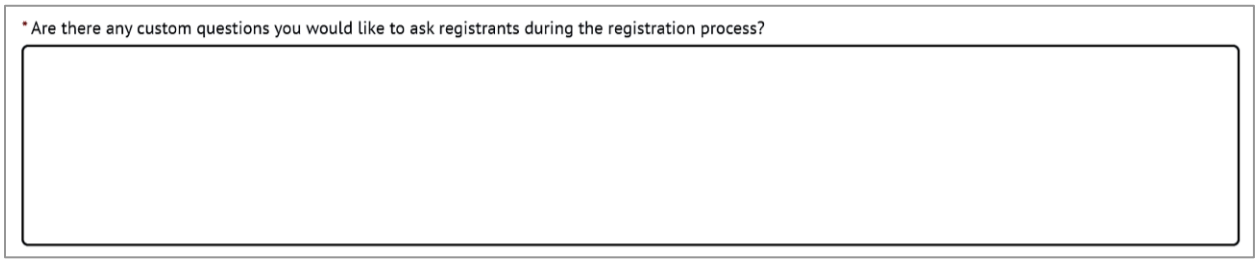
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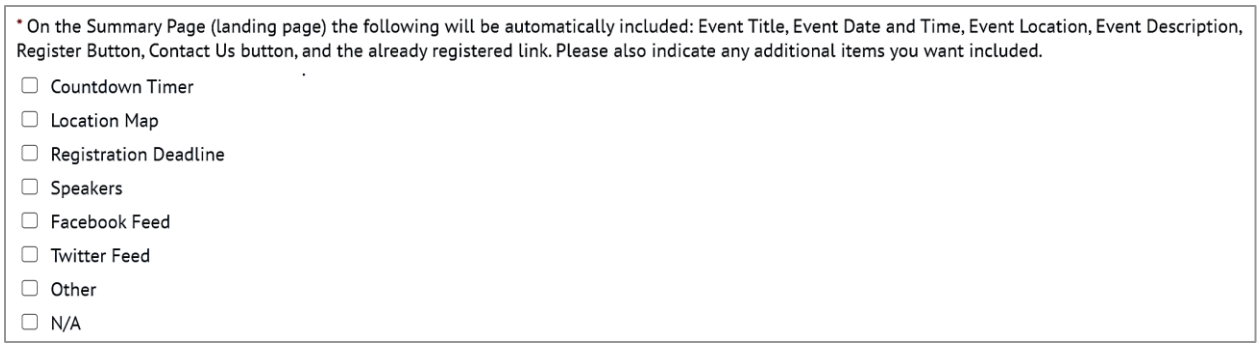
If the event is searchable, it can be found via search engine. If this is an exclusive or invite only event, consider checking no.



A variety of questions can be included here ranging from a graduation date to dietary restrictions and beyond.



The summary page is customizable to draw in registrants and provide pertinent information.

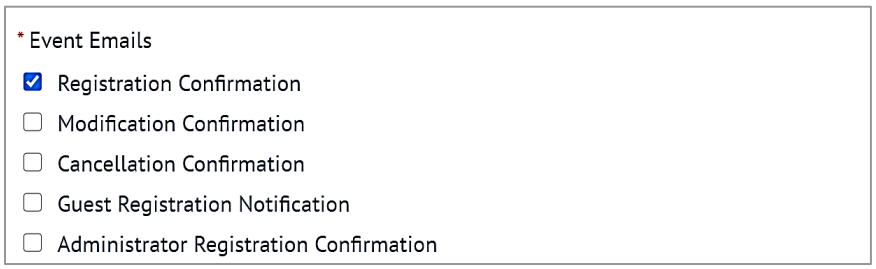


Event Emails

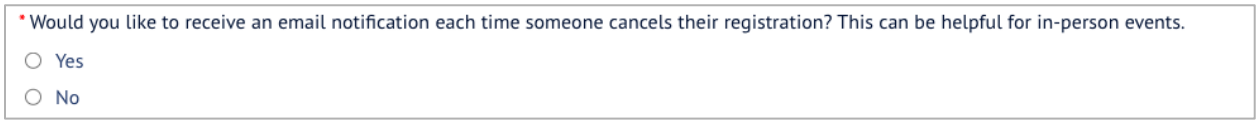
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In the Event Emails section, you will select which emails to include for your event correspondence and promotion. In the Registration Emails section, the Registration Confirmation email is required. This provides registrants with a receipt of their registration.

The only required email is the Registration confirmation which ensures registrants have a receipt of their registration.

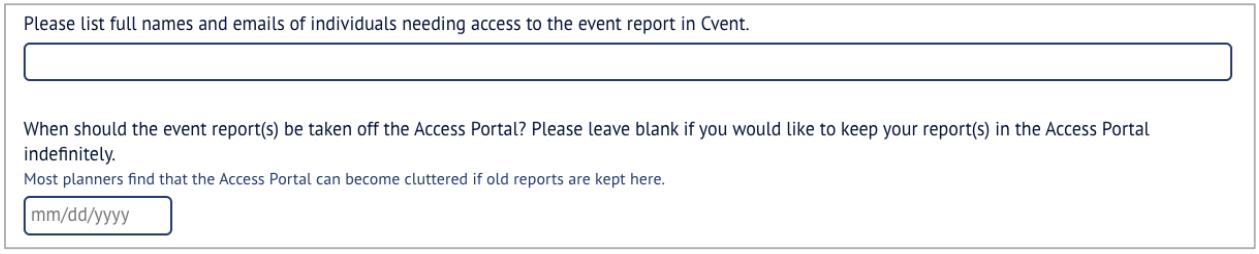


This section about receiving notifications about people cancelling their registration can help with planning seats and meals. Clicking yes here will ensure that the planner receives emails regarding cancellations.



Reporting

In the reporting section you can provide the names and emails of each individual that should have access to your event reports. Each person will receive an email to log into the UIF Access Portal in Cvent and they will have access to pull their reports whenever they would like an update. You will have the ability to export reports to an Excel file. You can also provide a date at which these reports can be taken off the access portal or leave it blank so that reports are kept in the portal.

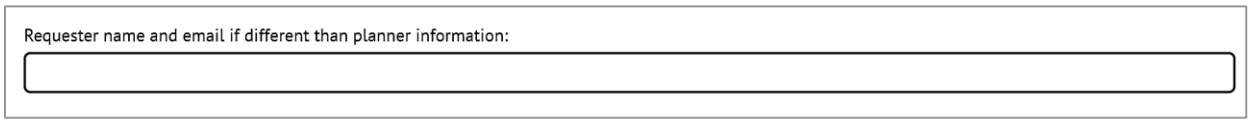


Additional Items

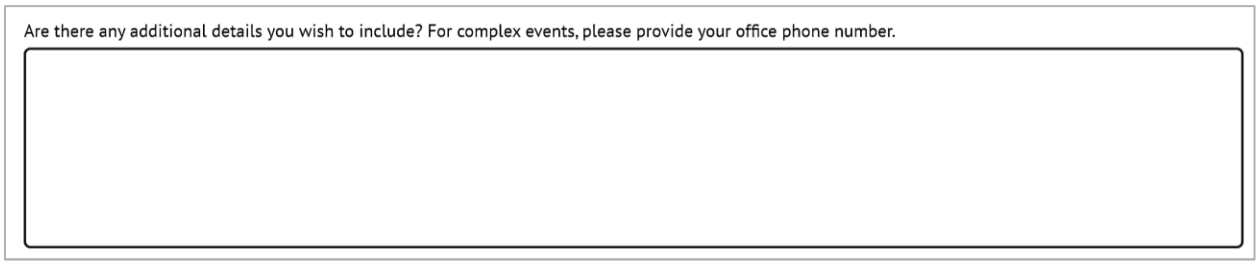
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The Additional Items section contains only optional questions. This section allows you to provide any additional information necessary to create your event. If the event is complex, you can call the Office of Board and Donor Relations to discuss your event in more detail. Complex events include events where the gift/non gift split has multiple (more than 5) sections, the event has multiple sessions spread over multiple days, or multiple registration types that follow different pathways.

Provide YOUR name if different than listed above for contact purposes.



Additional details can be provided for multi-level, multi-registration path or complex events.



Process

Please allow 5-7 business days for your initial request to be processed. Once the event has been created, the event will be sent back to you to approve the design and the content.

Once your event has been created and you have approved the event, UIF will go through their secondary approval process, then we will launch your event.

Post-launch changes are not encouraged; however, the UIF event team recognizes that pertinent event details change and are always evolving. Changes that can be made post-launch include amending the event description, update the event location, changing the event title, and adding images. Most other post-launch changes will alter the site configuration and pose a threat to the integrity of your site.

Assistance can be found through the Board and Donors Relations phone number at 217-333-8663.

Changes that **CAN** be made post-launch	Changes that **CANNOT** be made post-launch

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• Event Description • Location • Title • Images	• Event configuration ○ Registration types ○ Admission items ○ Fees ○ Discounts • Event Emails

Please ensure that before submitting the form that you read over both checkboxes and make a pdf copy in the case of technical difficulties.

* I confirm that I understand it will take 5-7 business days for the initial event creation. Any changes made will require additional time.

☐ I understand

* I confirm that I understand after my event is launched, I will not be able to make any financial changes to this event. I also understand that if I request other changes after the event is launched that my request may be denied.

☐ I understand

Graphics Cheat Sheet

Header Background Images: 1920px wide

Email Header: 600px x 150px

Logo Images: 190px x 80px

Speaker Images: 300px x 300px

UPDATED 10/22/24

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FUNDS RECEIVED TAB

Documentation to be Determined

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FUNDRAISER TAB

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FUNDRAISER PAGE OVERVIEW

HOW TO MANAGE YOUR PORTFOLIO

The Fundraiser page has been designed to give advancement officers quick access to their plans and prospects, opportunities, and plan steps/to-do items. Some information can be added, edited, or deleted directly from the Fundraiser page or its associated tabs. The information found on the Fundraiser page can also be found on the Fundraiser tab of every advancement officer's individual constituent record.

Fundraiser Page

The tabs on the Fundraiser page generally fall into one of two categories: Data Entry or Analysis.

Data Entry tabs are used to update plans and opportunities associated with the advancement officer's portfolio. Tabs include Attention |Opportunities, Attention | Plans, Pending Activity, Portfolio, and Research Requests.

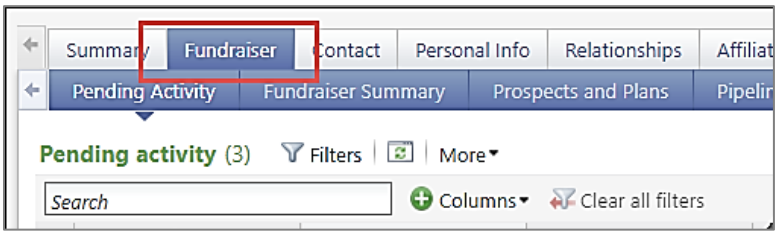
Analysis tabs are used to help advancement officers analyze activities and opportunities associated with their portfolios. These tabs are also useful during a staff member's yearly review. Tabs include Active Opportunities, Closed Opportunities, Completed Step Summary, Planned Step Summary, Goals, and Prospect Summary.

Accessing the Fundraiser Tab

The Fundraiser tab can be accessed when viewing an advancement staff member's individual record. The Fundraiser tab includes the Fundraiser Summary tab which is not found on an advancement officer's Fundraiser page.



Open the record of the fundraiser and navigate to the Fundraiser tab. You can also click the **Advancement Staff** constituency link displayed at the top of the page to jump to the Fundraiser tab.

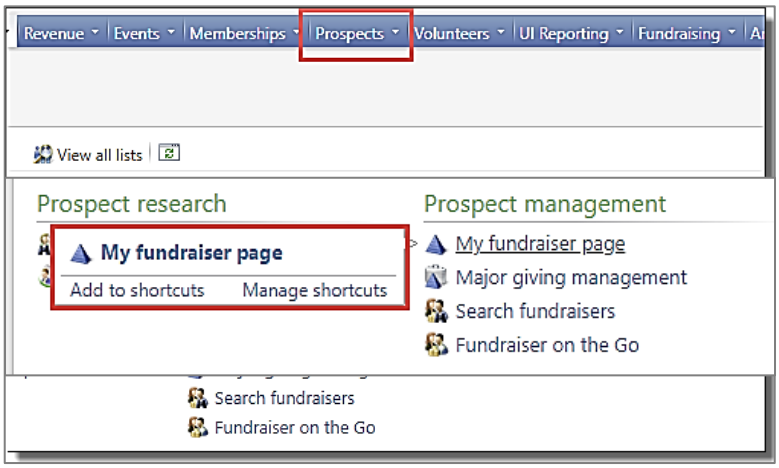


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Accessing the Fundraiser Page

Click the **Prospects** menu in the navigation bar to open the full menu, and then click **My fundraiser page**.



Bookmark the Fundraiser Page

If you hover over the **My fundraiser page** link for a few seconds, a pop-up menu appears. Select **Add to shortcuts** to add a link to the Fundraiser page in the left sidebar.

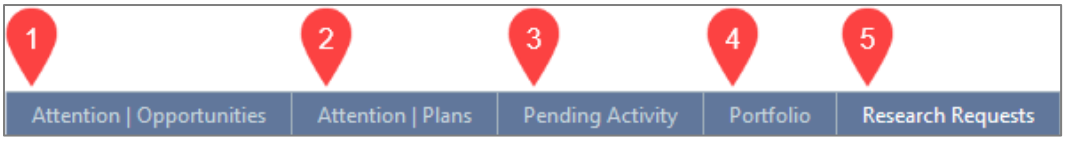
Alternatively, once on the Fundraiser page, select the **Add this page to shortcuts** action in the left sidebar to bookmark the page.

Removing the ImageKey Column

Several tabs on the **Fundraiser page** may show yellow alert symbols in the ImageKey column. This column is a built-in feature from Blackbaud that we do not use as part of our practices. Users are recommended to use the **Columns** button to hide the ImageKey column.

Summary of the Fundraiser Page Tabs

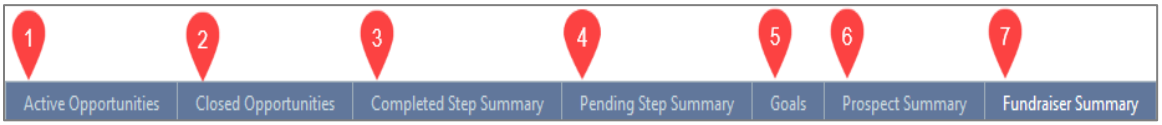
The **Fundraiser page** contains a series of tabs. Each tab is listed below with a short description of the data it contains.



1. **Attention |Opportunities** – Contains information on any errors or incomplete fields in the opportunities associated with the advancement officer.
2. **Attention | Plans** – Contains information on any errors or incomplete fields in the plans associated with the advancement officer.
3. **Pending Activity** – A list of any plan steps that have been marked as Pending.
4. **Portfolio** – A list of plans and prospect assignments for the fundraiser.
5. **Research Requests** – Displays all Research Requests made by or for the fundraiser.

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1. **Active Opportunities** - A drill-through report detailing and segmenting different types of active opportunities the fundraiser is working.
2. **Closed Opportunities** – A drill-through report detailing and segmenting the opportunities the fundraiser has closed.
3. **Completed Step Summary** – A summary of all plan steps with a status of Completed. Each link displayed on this tab can be clicked for more details.
4. **Pending Step Summary** – A summary of all plan steps with a status of pending. Each link displayed on this tab can be clicked for more details.
5. **Goals** – Details the fundraiser's metrics including opportunities, visits, solicitations, and new business from the pipeline. Additional information can be found in the Goals documentation.
6. **Prospect Summary** – A summary of all prospect plans for this fundraiser. Each link displayed on this tab can be clicked for more details.
7. **Fundraiser Summary** – The fundraiser's job title, start date, and advancement site.

REVIEWED 12/20/24

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CONFIGURE EMAIL ALERTS (MY FUNDRAISER PAGE)

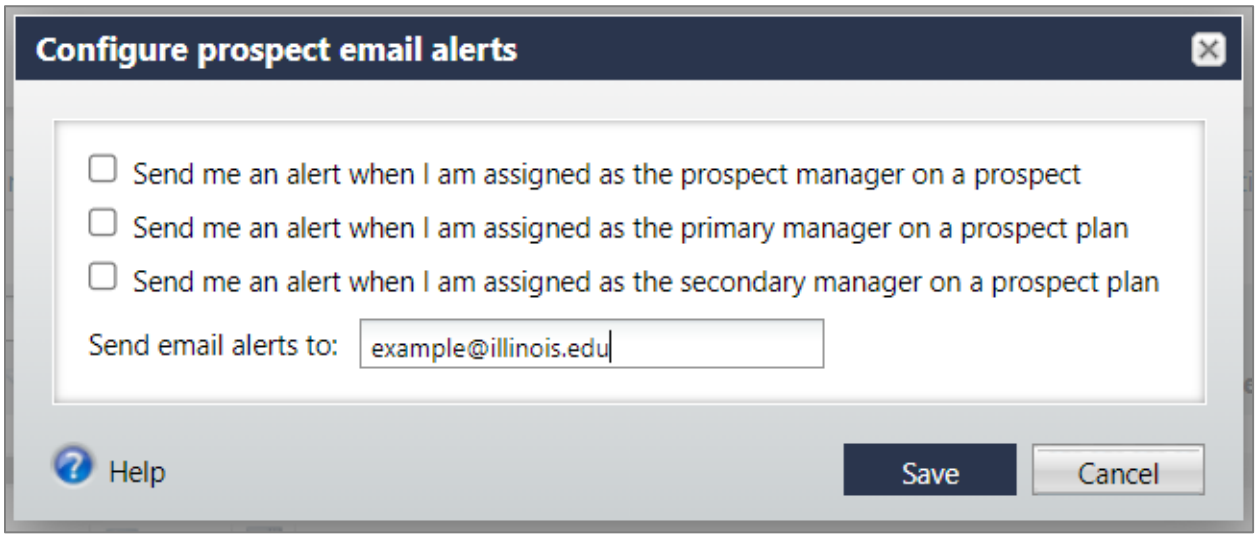
GET NOTIFIED OF CHANGES IN YOUR PORTFOLIO

From their My Fundraiser page, development officers can configure email alerts, so they get notified when plans or prospects are added to their portfolio.

To do this, from the My Fundraiser Page, go to the upper left corner and click on **Configure email alerts**.



All three checkboxes are unchecked by default, but some development officers may find it useful to be notified of changes to their assignments.



Anyone opting in to email alerts should make sure that the correct email goes into the email field.

Reviewed 04/09/2025

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ACTIVE & CLOSED OPPORTUNITIES TABS (FUNDRAISER PAGE)

ANALYZING THE OPPORTUNITIES ON YOUR PORTFOLIO

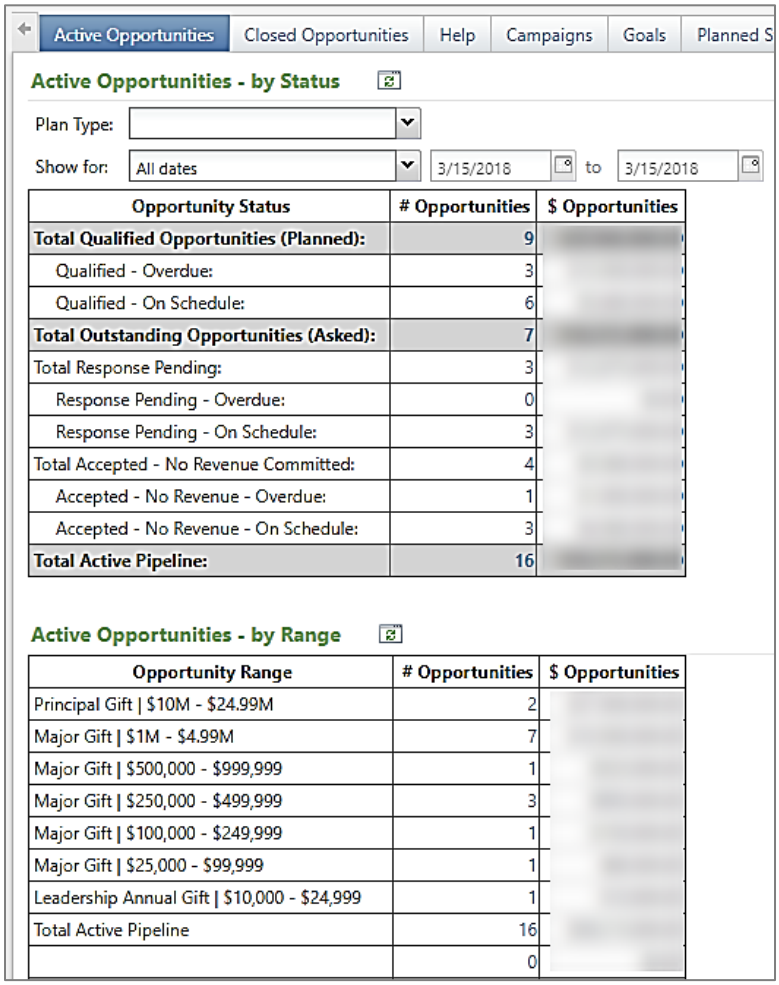
The Active and Closed Opportunities tabs are part of the portfolio analysis tabs available on a development officer's Fundraiser page. The purpose of these tabs is to provide a summarized view of active and closed opportunities using live data from the TED system. These tabs differ from UI Reports since the latter uses data from the warehouse that is refreshed on a nightly basis.

The tabs are designed to support individual development officers in summarizing and analyzing their work. Rolled up and Unit views are available in the Active Pipeline Report suite in UI reporting.

Active & Closed Opportunities Tabs Summary

The **Active Opportunities** tab contains two drill through views that allows a development officer to analyze his/her active opportunities. The blue links (under # Opportunities) in each report open detailed information on the specific segmented Opportunity type. Active Opportunities include any Opportunity in the following statuses: Qualified, Response Pending, and Accepted – No Revenue Committed.

The **Closed Opportunities** tab contains a single drill through report that allows a development officer to analyze his/her closed opportunities. The blue links (under # Opportunities) in the report will open a detailed report on the specific segment of Opportunity status. Closed Opportunities looks at both active and historical plans. Closed Opportunities include any Opportunity in the following statuses: Accepted, Canceled, and Rejected.



Opportunity Status	# Opportunities	$ Opportunities
Total Qualified Opportunities (Planned):	9	
Qualified - Overdue:	3	
Qualified - On Schedule:	6	
Total Outstanding Opportunities (Asked):	7	
Total Response Pending:	3	
Response Pending - Overdue:	0	
Response Pending - On Schedule:	3	
Total Accepted - No Revenue Committed:	4	
Accepted - No Revenue - Overdue:	1	
Accepted - No Revenue - On Schedule:	3	
Total Active Pipeline:	16	

Active Opportunities - by Range

Opportunity Range	# Opportunities	$ Opportunities
Principal Gift | $10M - $24.99M	2	
Major Gift | $1M - $4.99M	7	
Major Gift | $500,000 - $999,999	1	
Major Gift | $250,000 - $499,999	3	
Major Gift | $100,000 - $249,999	1	
Major Gift | $25,000 - $99,999	1	
Leadership Annual Gift | $10,000 - $24,999	1	
Total Active Pipeline	16	
	0	

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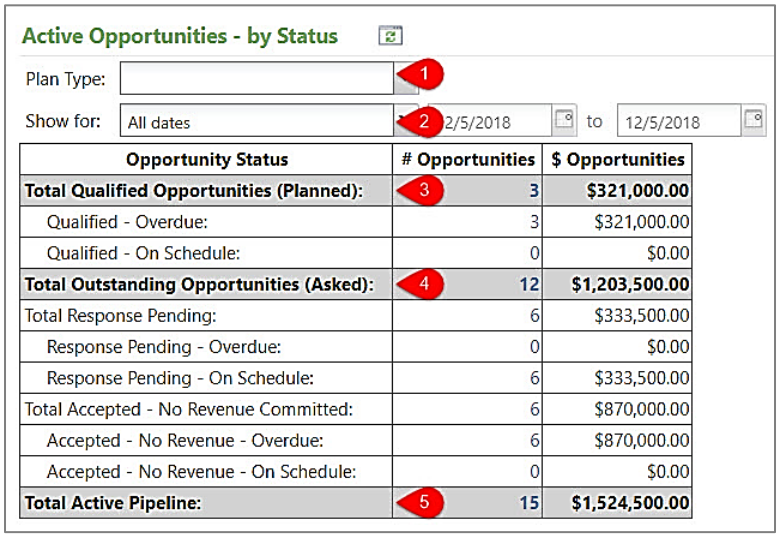
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Active Opportunities

The **Active Opportunities** tab displays information from the development officer's portfolio in two ways: By Status and By Range.

Active Opportunities – by Status

This table displays information on qualified Opportunities that the development officer either plans to ask or has asked for from the donor. Active Opportunities – by Status auto-populates with all active Opportunities in the development officer's portfolio.



Opportunity Status	# Opportunities	$ Opportunities
Total Qualified Opportunities (Planned): 3	**3**	**$321,000.00**
Qualified - Overdue:	3	$321,000.00
Qualified - On Schedule:	0	$0.00
Total Outstanding Opportunities (Asked): 4	**12**	**$1,203,500.00**
Total Response Pending:	6	$333,500.00
Response Pending - Overdue:	0	$0.00
Response Pending - On Schedule:	6	$333,500.00
Total Accepted - No Revenue Committed:	6	$870,000.00
Accepted - No Revenue - Overdue:	6	$870,000.00
Accepted - No Revenue - On Schedule:	0	$0.00
Total Active Pipeline: 5	**15**	**$1,524,500.00**

1. Select any of the plan types from the **Plan Type** drop-down menu to re-sort the table with information on that specific plan type.
2. To limit displayed Opportunities and totals, select from the **Show for** drop-down list. The drop-down menu offers pre-selected date ranges or select the <Specific date range> option to choose specific dates from date fields.
3. **Total Qualified Opportunities (Planned**) - Total of all Qualified Asks that are overdue or planned.
    a. Qualified – Overdue – Qualified Asks that are past their expected ask dates.
    b. Qualified – On Schedule – Qualified Asks that are not past their expected ask dates.
4. **Total Outstanding Opportunities (Asked) -** Total of all Response Pending and Accepted Asks – No Revenue Committed.
    a. **Total of all Response Pending Asks** – Total of all Response Pending Asks.
        i. **Response Pending – Overdue –** Response Pending Asks that are past their response dates.
        ii. **Response Pending – On Schedule** – Response Pending Asks that are not past their response dates.
    b. **Total Accepted – No Revenue Committed** – Accepted Asks that do not yet have associated revenue.
        i. **Accepted – No Revenue – Overdue** – Accepted Asks that do not yet have associated revenue and the Expected Commitment date is in the past.
        ii. **Accepted – No Revenue – On Schedule** – Accepted Asks that do not yet have associated revenue and the Expected Commitment date is in the future.
5. **Total Active Pipeline** – Summary of all Qualified, Response Pending, and Accepted – No Revenue Committed.

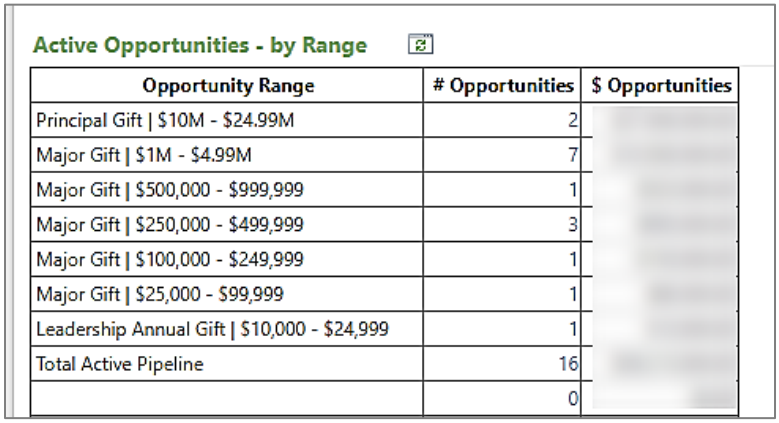
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Active Opportunities – by Range

This table is populated by the same information as the Active Opportunities – by Status section but displays the information by the amount the development officer has either asked for or expects to ask for from the donor.

The blue links (under # Opportunities) in the report will open detailed information on the specific segmented Opportunity Status and the Total Active Pipeline.

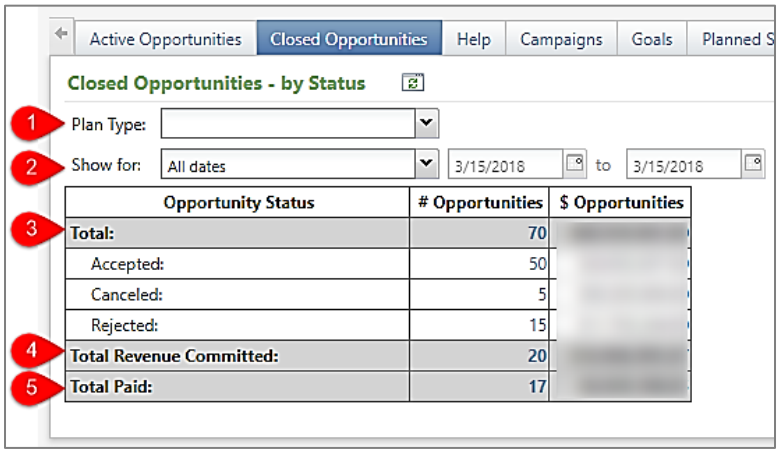


Active Opportunities - by Range

Opportunity Range	# Opportunities	$ Opportunities
Principal Gift | $10M - $24.99M	2	
Major Gift | $1M - $4.99M	7	
Major Gift | $500,000 - $999,999	1	
Major Gift | $250,000 - $499,999	3	
Major Gift | $100,000 - $249,999	1	
Major Gift | $25,000 - $99,999	1	
Leadership Annual Gift | $10,000 - $24,999	1	
Total Active Pipeline	16	
	0	

Closed Opportunities

The **Closed Opportunities** tab displays information from the development officer's active and historic plans. This information is pulled directly from the Opportunity and is not dependent on the plan being historical. Closed Opportunities – by Status auto-populates with all closed Opportunities in the development officer's portfolio.



Opportunity Status	# Opportunities	$ Opportunities
Total:	70	
Accepted:	50	
Canceled:	5	
Rejected:	15	
Total Revenue Committed:	20	
Total Paid:	17	

1. Select any of the specific plan types from the **Plan Type** drop-down menu to filter the table with information on that specific plan type.
2. To limit displayed Opportunities and the totals, select from the **Show for** drop-down list. The drop-down menu offers preselected date ranges or selects the <Specific date range> option to choose specific dates from date fields.
3. **Total** –
    a. **Accepted** – Status of the Opportunity is Accepted and using the Response Date, shows the Accepted Amount.
    b. **Canceled** – Status of the Opportunity is Canceled and shows the Expected Ask Amount and Expected Ask Date. If the Expected Ask Date is blank, the Ask Date is used; and if the Ask Date is blank, the Response Date is used.
    c. **Rejected** – Status of Opportunity is Rejected and using the Response Date, it shows the Ask Amount.

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4. **Total Revenue Committed** – Status of Opportunity is Accepted and using the Response Date, it shows the Revenue Committed Amount.
5. **Total Paid** – Status of Opportunity is Accepted and using the Response Date, it shows the Amount Paid.

The blue links (under # Opportunities) in the graph will open detailed information on the specific segmented area. Detailed information will change if the selected segmentation criteria changes.

UPDATED 12/06/24

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ATTENTION TABS (FUNDRAISER PAGE)

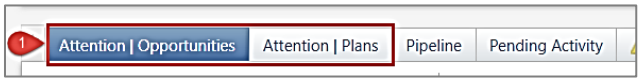
KEEPING YOUR PLANS & OPPORTUNITIES ACCURATE

The Attention tabs within the Fundraiser Page, and the Attention sub-tabs in the Fundraiser Tab, are designed to aid fundraisers in managing the various activities necessary to complete their tasks related to plans and opportunities. On these tabs, you will see alerts related to any plan that you are assigned as the Primary Plan Manager.

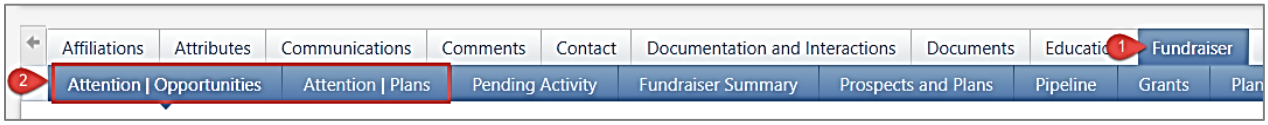
The Attention tabs within the Fundraiser Page, and the Attention sub-tabs in the Fundraiser tab contain identical data lists. You may choose to use either one.

Navigating to the Attention Tabs

1. The Attention tabs can be found on the Fundraiser page. This is only viewable by the Advancement Staff person when logged into TED.



Navigating to the Attention Sub-tabs



1. Open the Advancement Staff's individual TED record and click the Fundraiser tab.
2. The Attention sub-tabs are located within the Fundraiser tab. These sub-tabs are accessible by all TED users with access to view plans.

Sections of the Attention Tabs

Below are the sections on these two tabs. They help alert you to missing or incorrect information within a given plan. Keep in mind that if a plan or an Opportunity has more than one problem, that plan or Opportunity may appear in multiple sections at of the Attention Tab at the same time. You may correct all related errors to a plan or an Opportunity at once when making data edits.

Each of the sections listed below is defined in the following pages of this document with a screenshot and more information on what the section means and how to repair the missing or incorrect information.

Attention | Opportunities Tab

- Opportunities | Qualified – Overdue Ask
- Opportunities | Expected Book Amount – Unknown or Blank
- Opportunities | Likelihood – Unknown or Blank
- Opportunities | Response Pending – Overdue Response
- Opportunities | Designation update needed
- Opportunities | Accepted – No Revenue – Overdue

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Attention | Plans Tab

- Plans | Active Plan with Associated Revenue
- Plans | Step missing Comment after Visit
- Plans | Missing Next Ste

Opportunities | Qualified – Overdue Ask

ISSUE:

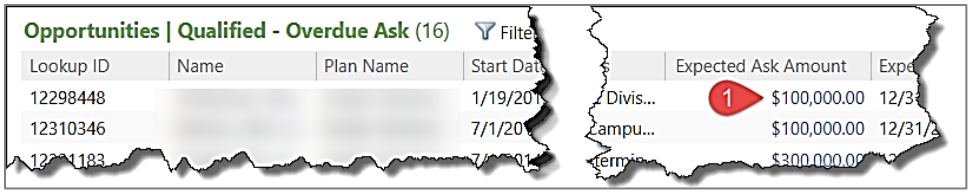
Opportunity with a Qualified status where the Expected Ask Date is before today.

RESOLUTION:

An ask status of Qualified indicates the ask has not yet been made. Expected ask dates are forward-looking; therefore, dates should not be in the past.

ACTION NEEDED:

1. Click the Expected Ask Amount value to open the Edit Opportunity window.



2. If the ask has not yet been made, change the Expected Ask Date to a future date.
3. If you have already made the ask, update the status to reflect the appropriate status (e.g. response pending, accepted, rejected or canceled).





Opportunities | Expected Book Amount – Unknown or Blank

ISSUE:

Opportunity has no Expected Book Amount.

RESOLUTION:

All opportunities should have an expected book amount filled out that reflects the amount you expect will be booked as revenue into the system.

ACTION NEEDED:

1. Click the Expected Ask Amount value to open the Edit Opportunity window.

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2. Add an Expected Ask Amount dollar value. The value must be $10 or greater.



Opportunities | Likelihood – Unknown or Blank

ISSUE:

Opportunity with an active Status where the Likelihood is unknown or is blank.

RESOLUTION:

Once it is determined that an Ask should be made, the fundraiser will have an idea of the amount that should be asked for and the likelihood that the prospect will commit to the expected commitment amount. Therefore, any active opportunity should have a likelihood assigned to it.

ACTION NEEDED:

1. Click the Expected Ask Amount value to open the Edit Opportunity window.



2. Add a likelihood value.



Opportunities | Response Pending – Overdue Response

ISSUE:

Opportunity with a Response Pending status has a Response Date before today.

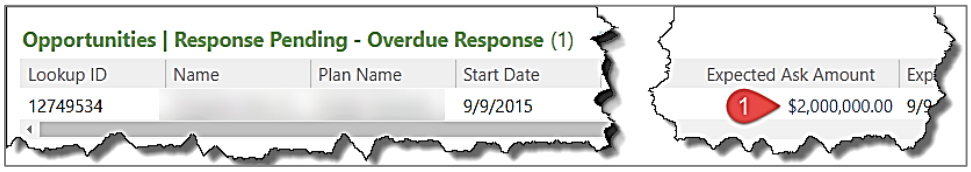
RESOLUTION:

Once an ask has been made, the status becomes Response Pending. Fundraiser should enter a Response Date that estimates when they expect the prospect to communicate a decision. Once a decision is confirmed, the status of the opportunity will become Accepted or Rejected and the response date should be updated to reflect the actual date the fundraiser received confirmation from the prospect.

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ACTION NEEDED:

1. Click the Expected Ask Amount value to open the Edit Opportunity window.



2. Change the opportunity's Status to be Accepted or Rejected as appropriate.
3. Update the Response Date to reflect the actual Response Date or expected Response Date in the future.



Opportunities | Designation Update Needed

ISSUE:

Opportunity designation does not roll up to the department level.

RESOLUTION:

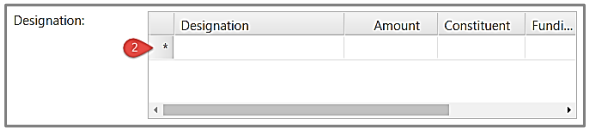
This item is flagged when the plan stage is nearing the state of closure or the accepted ask amount is greater than $0. In these situations, there is a high probability that the fundraiser will know which department will benefit from the gift. If the donor's gift will establish a new fund, the placeholder designation at the department should be entered. Otherwise, the actual designation the fundraiser asked the prospect to give to should be used.

ACTION NEEDED:

1. Click the Expected Ask Amount value to open the Edit Opportunity window.



2. Add the appropriate designation(s) and amount(s), at the designation or department level.



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Opportunities | Accepted – No Revenue – Overdue

ISSUE:

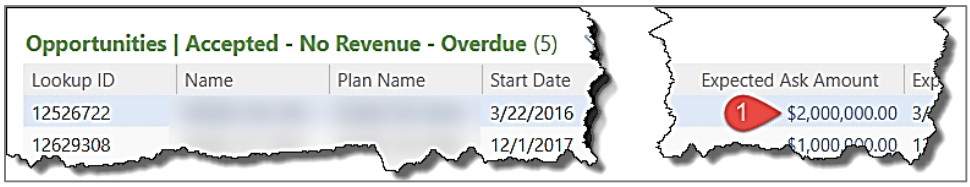
Opportunity has an Accepted Status, an Expected Commitment Date before today and there is no revenue associated to the opportunity.

RESOLUTION:

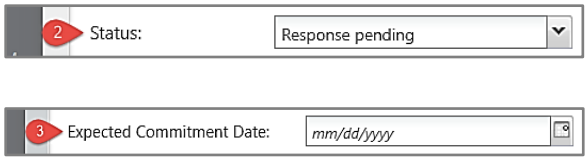
If an opportunity is accepted and the expected commitment date is in the past, but no revenue has been associated to the opportunity, further follow up is needed with UIF or with the prospect.

ACTION NEEDED:

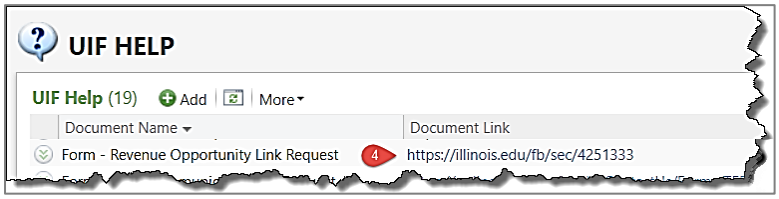
1. Click the Expected Ask Amount value to open the Edit Opportunity window.



2. If the donor has not yet accepted the ask, change the status back to Response Pending.
3. If the donor has accepted the ask, but Expected Commitment Date has passed, update the Expected Commitment Date to be when you expect that the gift transaction will appear on the UI Household Giving tab and be linked to the plan.



4. If the gift appears in TED on the UI Household Giving tab, but has not been associated to the opportunity, file a Research Request for Revenue Association.



Plans | Active Plan with Associated Revenue

ISSUE:

A plan with associated revenue is still active.

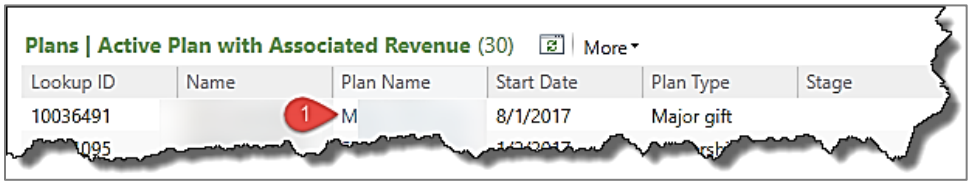
RESOLUTION:

Generally, only one associated revenue transaction will be linked to an opportunity in the plan. Therefore, if revenue has already been associated to the opportunity, and the plan does not need to remain open for the fundraiser to engage in stewardship activity, then the plan should be made historical.

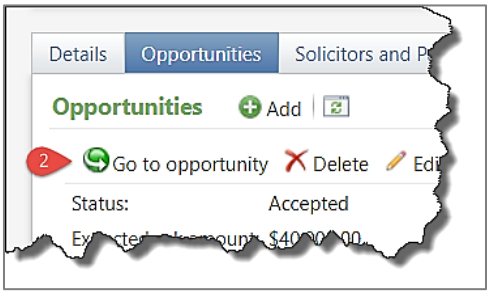
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ACTION NEEDED:

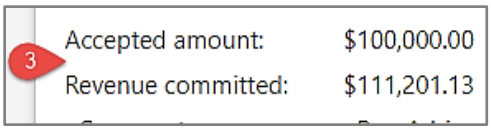
1. Click the Plan Name value to open the plan.



2. Click the Opportunities tab and the green Go to Opportunity button.



3. Compare the Revenue committed value with the Accepted amount. If you need to link more revenue to the opportunity file a Research Request for Revenue Association.



Plans | Step Missing Comment After Visit

ISSUE:

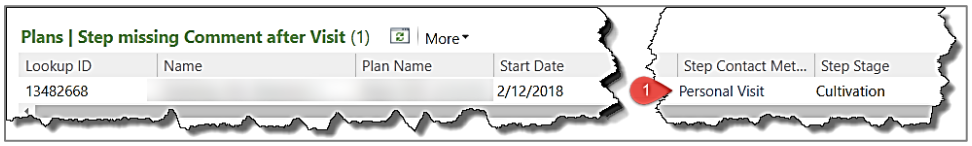
No comment was entered after a visit was completed.

RESOLUTION:

The comment field for a visit is where substantive detail should be recorded regarding what took place during the visit.

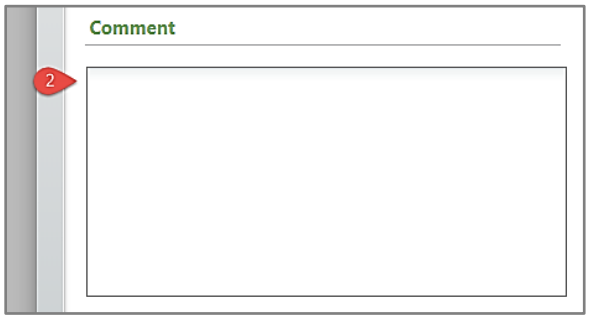
ACTION NEEDED:

1. Click the Step Contact Method value to open the Edit Step window.



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2. Fill in the Comment field with your relevant contact report notes.



Plans | Missing Next Step

ISSUE:

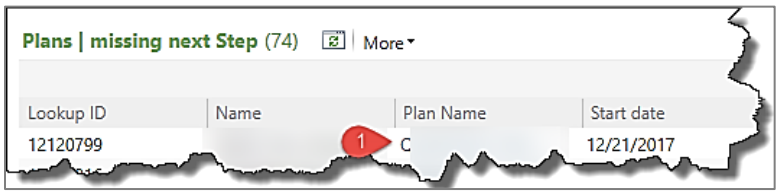
Plan does not have a next pending or planned step.

RESOLUTION:

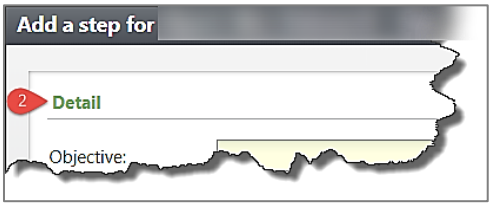
Per best practice, a strategy should be in place for each prospect, and the next step toward the plan's objective should be documented. If the plan's objective has been reached or abandoned, make the plan historical.

ACTION NEEDED:

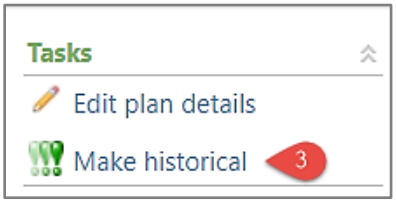
1. Click the Plan Name value to open the plan.



2. Add a next step for this plan to reflect the strategy you have developed for the prospect.



3. Make the plan historical if there is no more work to be done.



UPDATED 12/20/24

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GOALS TAB (FUNDRAISER PAGE)

USING ALL ASPECTS OF THE FUNDRAISER PAGE

The Goals tab displays progress towards goals for a fundraiser. This may include, but is not limited to, goals for number of visits and total dollar amounts for solicitations made. The parameters for this tab are fundraiser-specific and determined through goal-planning exercises. At end of the planning period, the goals are no longer editable and are considered locked. Once a goal is locked, the tab will display any progress toward the goal, but the goal itself can no longer be changed by the fundraiser directly. Changes to locked goals must be made by UIF User Support.

Please note that each university has a unique process for staff evaluation and may provide you with additional perspective on their approach and recommendations for setting and managing performance goals.

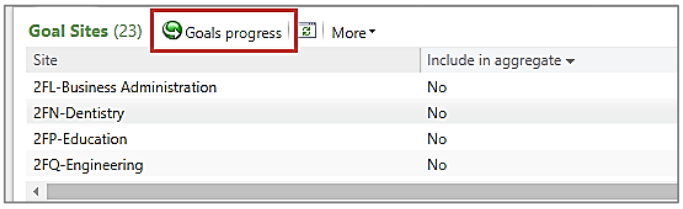
Goals Tab

The **Goals** tab displays both individual and unit goals for the advancement officer.



Goal Sites

The **Goal Sites** area displays any unit/sites from which the fundraiser has been assigned goals. This will be a single unit for most fundraisers, but some fundraisers will have goals for multiple sites.



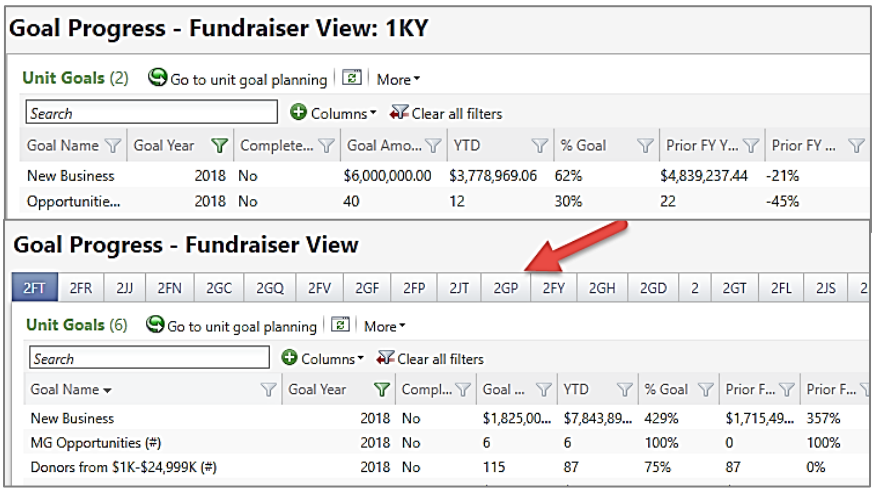
Clicking the **Goals Progress** button opens the **Goal Progress – Fundraiser View** page.

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Goal Progress – Fundraiser View

For fundraisers with a single assigned site, the Goals Progress page will display the goals for that specific site.

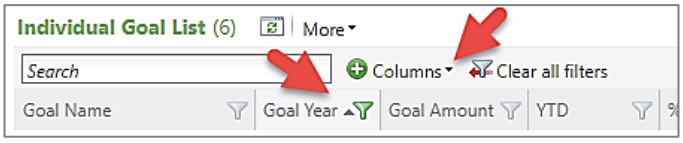
For fundraisers with multiple assigned sites, the Goals Progress page will display a tab for each available site. Select the appropriate site tab to review the goals for that site.



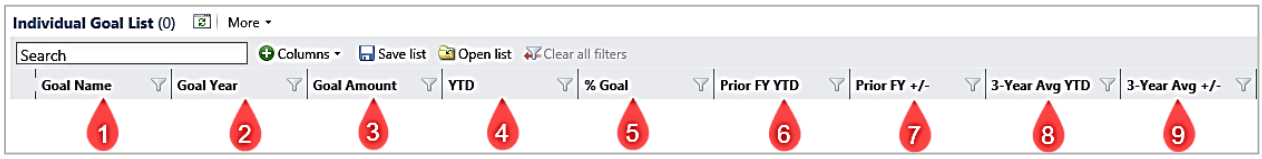
Individual Goal List

Under the Goal Sites list is the **Individual Goal List** section. This section displays information for the fundraiser's individual metrics for both current and past fiscal years.

Use the **Columns** menu to select what information is displayed in the grid below.



Use the **Filter** menu to limit the information displayed in the grid. It can be especially useful to filter the Goal Year column to limit the displayed goals to the current fiscal year.



Recommended columns to display are Goal Name, Goal Year, Goal Amount, YTD, % Goal, and Prior FY YTD.

1. **Goal Name** displays the name of the goal type selected.
2. **Goal Year** displays the fiscal year the goal is associated with.
3. **Goal Amount** displays the total goal amount, either monetary or not, for that fiscal year.
4. **YTD** displays the total fiscal year-to-date amount counted toward that goal for the fundraiser.
5. **% Goal** displays the percentage of the goal the fundraiser has completed during that fiscal year to date.
6. **Prior FY YTD** displays the percentage of the goal the fundraiser had completed at that point during the previous fiscal year.
7. **Prior FY +/-** displays the percentage above or below the same date one year ago.

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8. **3-year AVG YTD** displays the 3-year average for that goal through that same date.
    9. **3-year AVG +/-** displays the percentage above or below the 3-year average for that goal.

REVIEWED 12/12/24

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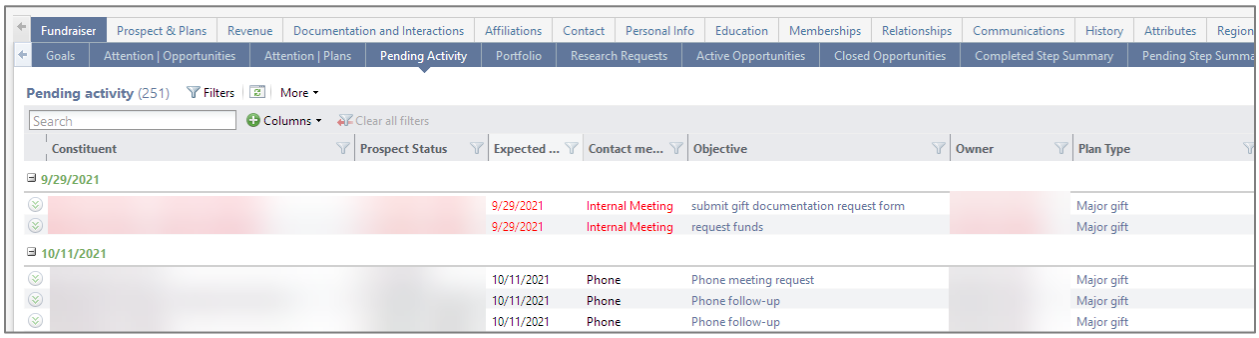
PENDING ACTIVITY TAB (FUNDRAISER PAGE)

USING ALL ASPECTS OF THE FUNDRAISER PAGE

The Pending Activity tab displays any step in Pending status for which the fundraiser is the step owner. This tab serves as the fundraiser's to-do list in TED.

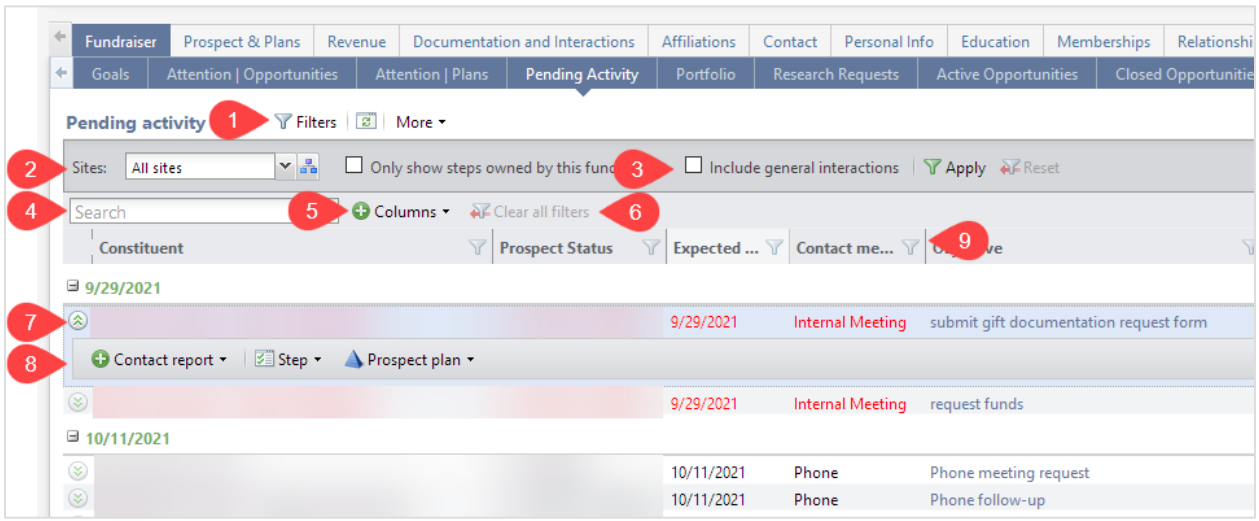
Pending Activity Tab

The Pending Activity tab is one of the data entry tabs on the Fundraiser page. The tab allows a fundraiser to navigate quickly and easily to a specific step on a plan or directly to the plan record. Clicking the hyperlinked constituent name will jump to their household record's Contact tab for quick access to their phone numbers and email addresses.



The columns in the pending Activity tab can display as much or as little information as the fundraiser finds necessary to complete their work. The available columns in this section mirror the fields available when creating or editing a plan step.

Steps that are past their expected date will display in red. All others will display in black.



1. The **Filters** option will expand or limit the information displayed based on specific factors chosen by the fundraiser.

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2. Once the filters option has been selected, the filter bar will appear.
    - The **All-sites** option was designed to limit the steps filtered to specific sites. This option does not function correctly and should not be used.
    - The **Only show steps owned by this fundraiser** check box filters out steps where the fundraiser has not been assigned as the step owner. Once checked or unchecked, click **Apply** activate or deactivate this option.
3. The **Include general interactions** option displays any general interaction, or interaction not related to a specific plan, where the fundraiser has been assigned as the owner of the general interaction. Once checked or unchecked, click **Apply** activate or deactivate this option.
4. The **Search** bar searches all fields displayed for the information entered.
5. The **Columns** drop down allows users to select which columns they wish to display. Displaying the following columns is recommended: Constituent, Objective, Owner, Plan Stage, Expected Date, Comment, Additional Solicitors, and Contact Method.
6. Select the **Clear all filters** option to remove any filters that have been added via the search bar or in the column headers.
7. Use the **double chevrons** to the left of the row to make edits to the plan, the step, or a contact report.
8. Once the plan menu has been expanded, the following edit options are available:
    a. **Contact Report** – File a contact report.
    b. **Step** – Mark complete, Edit step, and Delete step.
    c. **Prospect Plan** – Edit plan and Add step.
9. In the **Contact Method** column, click the filter option to choose a specific contact method or select all methods.

UPDATED 2/18/2025

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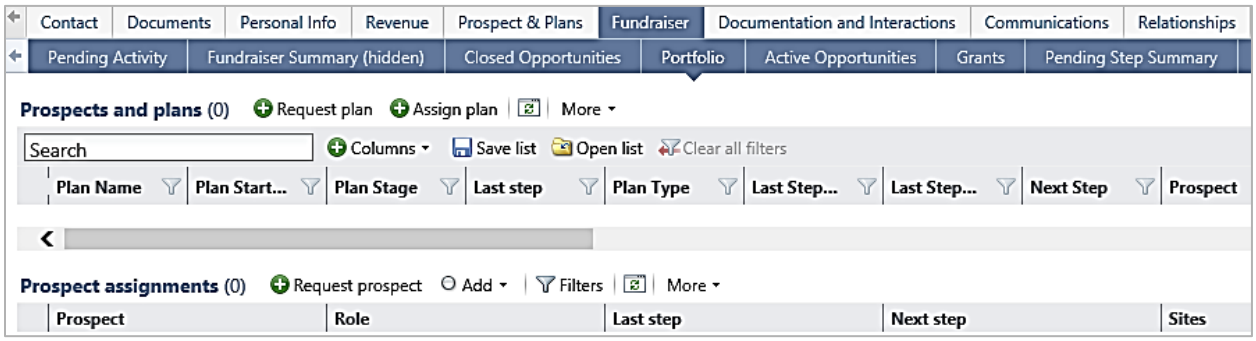
PORTFOLIO TAB (FUNDRAISER PAGE)

DISPLAYING THE FUNDRAISER'S PORTFOLIO

The **Portfolio** tab displays a fundraiser's portfolio—the active plans where the fundraiser is the primary plan manager or secondary solicitor.

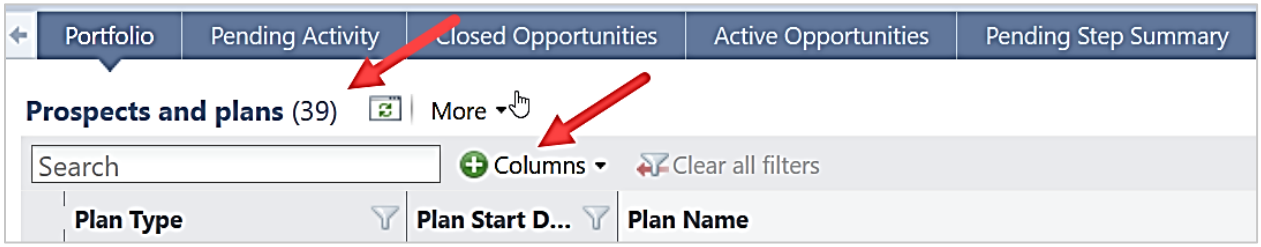
Portfolio Summary

The Portfolio tab is one of the available data entry tabs on the **Fundraiser** page. The tab allows a fundraiser to navigate quickly and easily to any associated plans, or to a prospect's household record.



Prospect and Plans

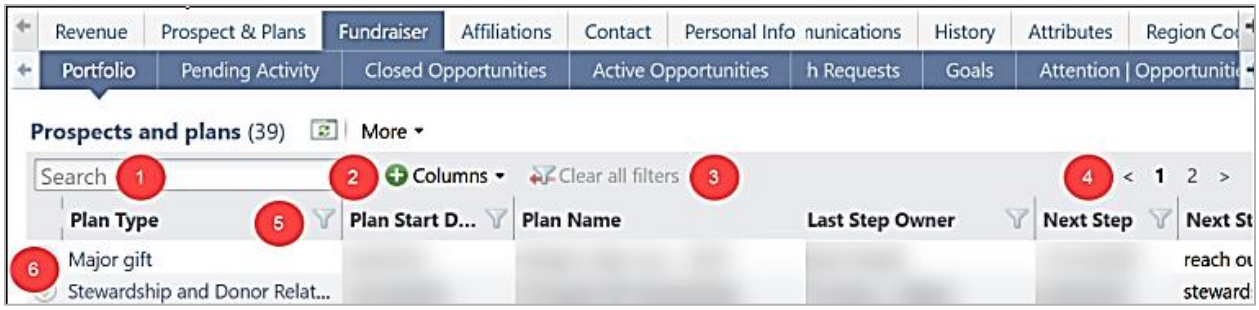
This section displays any plan the fundraiser is associated with as either the primary plan manager or as secondary solicitor.



The available columns in this section mirror the columns available on the plans tab of a constituent's household record. Use the **Columns** menu to change the displayed information. See the **Prospect Management Definitions documentation in iLearn Advancement or the TED User Guide** for more information on what columns are available, what information the columns display, and where that information is gathered from.

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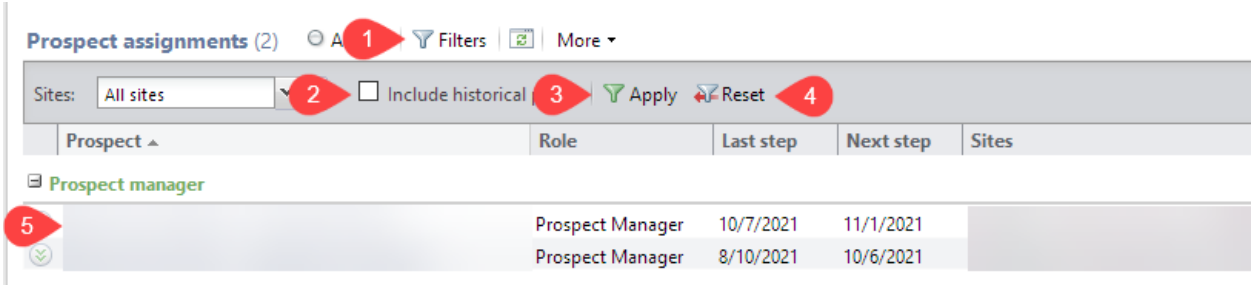
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1. **Search** - The Search bar searches all displayed fields for the information entered.
2. **Columns** – The Columns drop-down allows users to select which columns are visible in the Portfolio. The following columns are recommended: Prospect, Plan Name, Plan Type, Sites, Plan Stage, Primary Manager, and Opportunity Type.
3. **Clear all filters -** Selecting this option will remove any filters that have been added via the search bar, the Filters option, or in the column headers.
4. **Pages -** If necessary, use the page links to navigate through the available portfolio.
5. **Column Filters -** Use the column filters to limit what is displayed by column specific criteria. Multiple column filters can be used at a time narrow down or limit what is displayed.
6. **Hyperlinks -** Items in the Prospect Name and Plan Type columns are displayed as hyperlinks. Click these links to jump to the constituent's household record or the associated prospect plan.

Prospect Assignments

This section displays all prospects the fundraiser is associated with as a **Prospect Manager**.



1. **Filters** - The Filters option allows the fundraiser to include historical plans in the displayed prospect assignment list.
2. **Include historical plans -** The Include historical plans checkbox allows the fundraiser to easily toggle back and forth between current and historical prospect manager assignments.
3. **Apply -** Apply is used in conjunction with the Include historical plans checkbox. Historical plans will not be included or removed until the Apply option has been selected.
4. **Reset -** Use the reset option to quickly remove any filters assigned to the displayed list.
5. **Hyperlinks -** Items in the Prospect column display as hyperlinks. Click these links to jump to the constituent's household record (or the organization record if the constituent is an organization).

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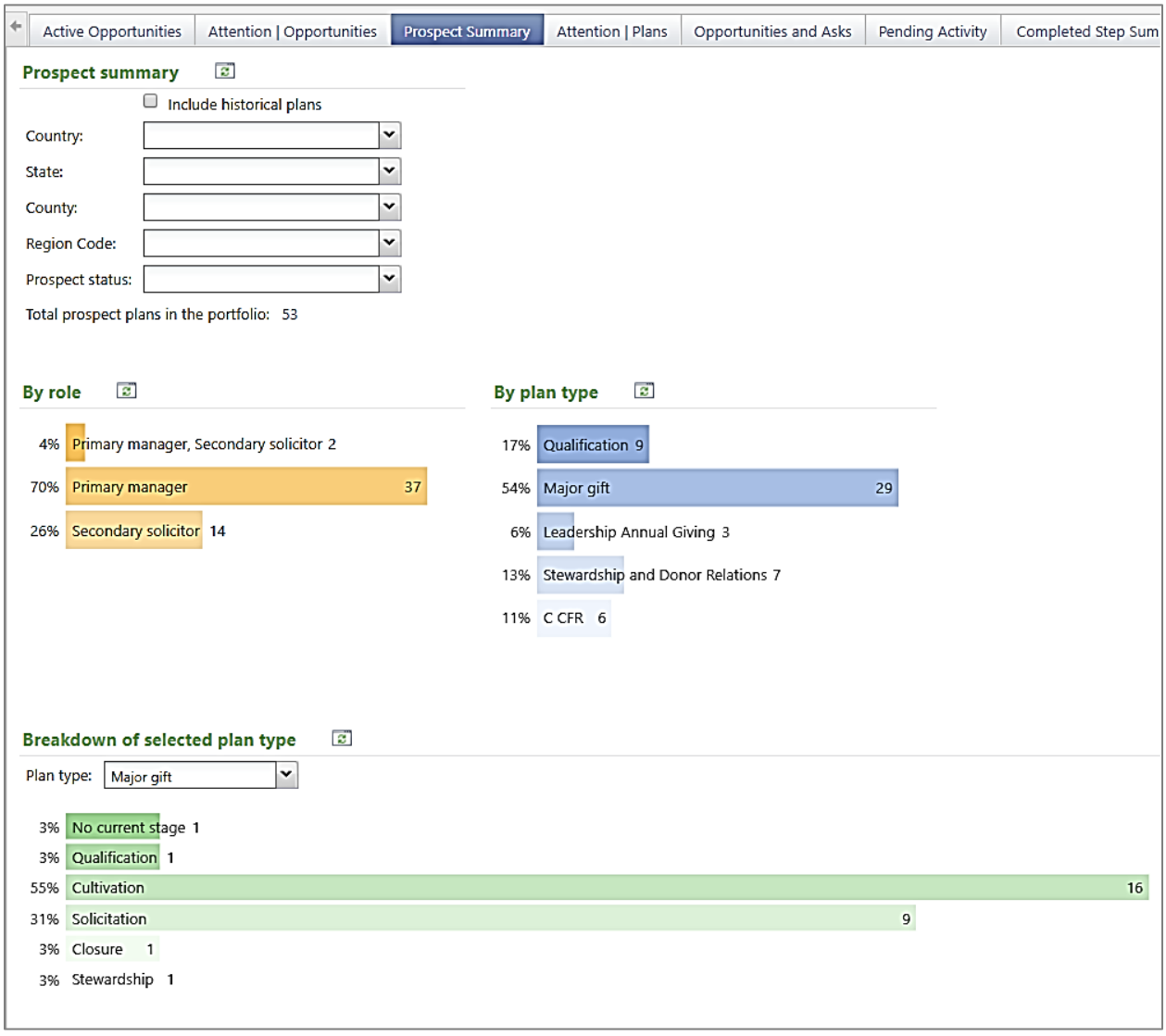
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PROSPECT SUMMARY TAB (FUNDRAISER PAGE)

VIEWING A FUNDRAISER'S PORTFOLIO COMPOSITION

The **Prospect Summary** subtab (under the **Fundraiser** tab) shows a drill-through summary view of a fundraiser's plans. The drill-through summaries can be used to run additional detailed reports on the fundraiser's portfolio.

Summary



- The **Prospect summary** area displays different filter options that will alter the information displayed in the **By role** and **By plan type** areas below.

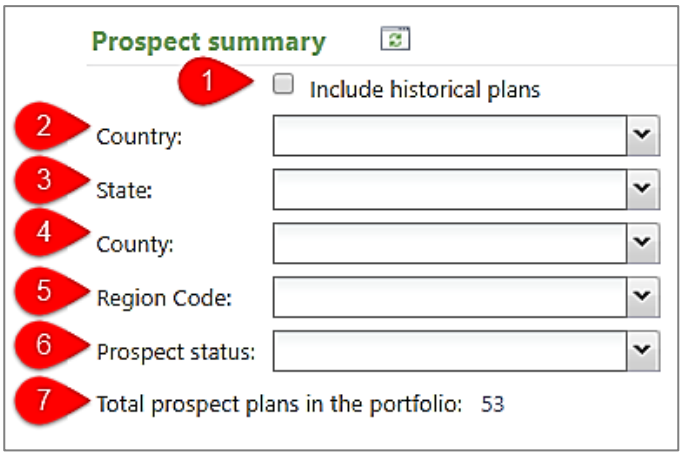
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- The **By role** area displays the fundraiser's activities by their role in the plan.
- The **By plan type** area displays the fundraiser's activities segmented by the different plan types in which the fundraiser is currently participating.
- The **Breakdown of selected plan type** area displays the specified plan type in groups based on the stage of the process in which the plan currently resides.

Reading the Prospect Summary Tab

The **Prospect Summary** section includes multiple filter options that will alter the information displayed in the **By role** and the **By plan type** areas based on the filter selected.

Each filter can be used independently as well as in conjunction with each other. As some of the drop-down menus are quite extensive, typing the first couple of letters in the menu field of drop-down can be useful.



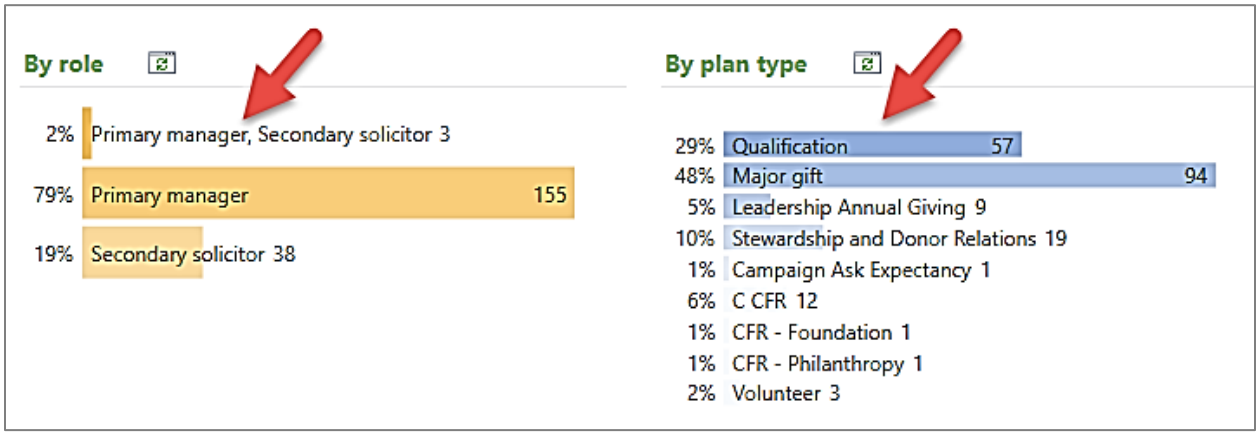
1. Select the **Include historical plans** checkbox to include historical plans in the portfolio summary below.
2. Only a single **Country** can be selected at a time.
3. The **State** drop-down is limited to the US and will not repopulate based on the Country selected.
4. The **County** drop-down displays all available counties in the US and will not repopulate based on the State selected. You may type in the county and use autocompletion to select a value rather than scrolling through all the options.
5. **Region codes** are geographical areas including US Metro Regions, updated by TED based on the constituent's contact information. It is important to note that constituents can have several region codes based on their residential and business addresses.
6. The **Prospect status** is dependent on the prospect status assigned to the household record.
7. The number displayed after **Total prospect plans in the portfolio** will initially display the total number of prospect plans. As different filters are applied, this number will display the total number of prospect plans that meet the specified criteria. The number will display as a hyperlink. Click the hyperlink to open a new report displaying all prospect plans that meet the specified criteria.

The **By role** section breaks down the total number of plans the fundraiser is associated with by their role in that plan. The section displays the number of plans associated with that specific role type. It will also display the percentage of the fundraiser's portfolio that is made up of that role type.

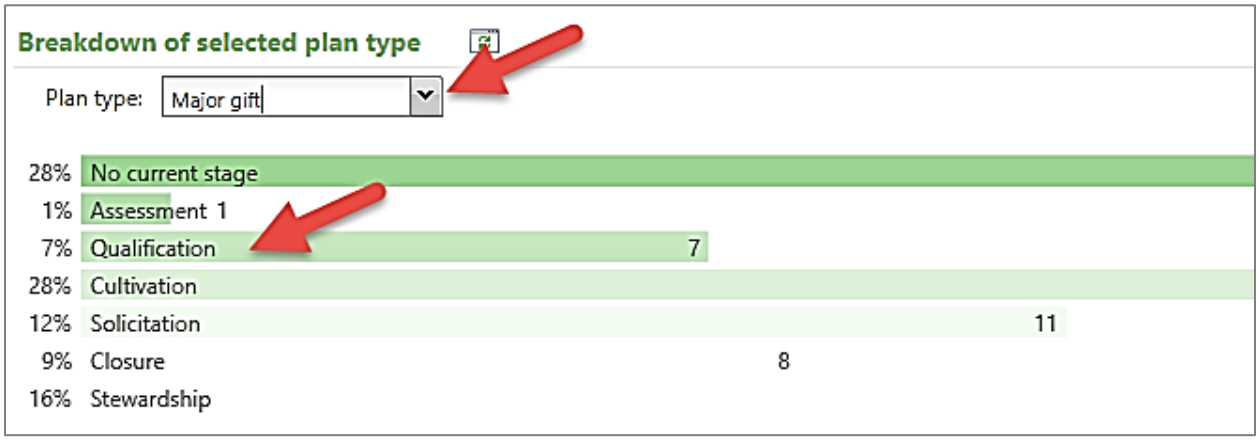
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The **By plan type** section breaks down the total number of plans the fundraiser is associated with by the type of plan. This section displays the total number of plans associated with that specific plan type. It will also display the percentage of the fundraiser's portfolio that is made up of that plan type.



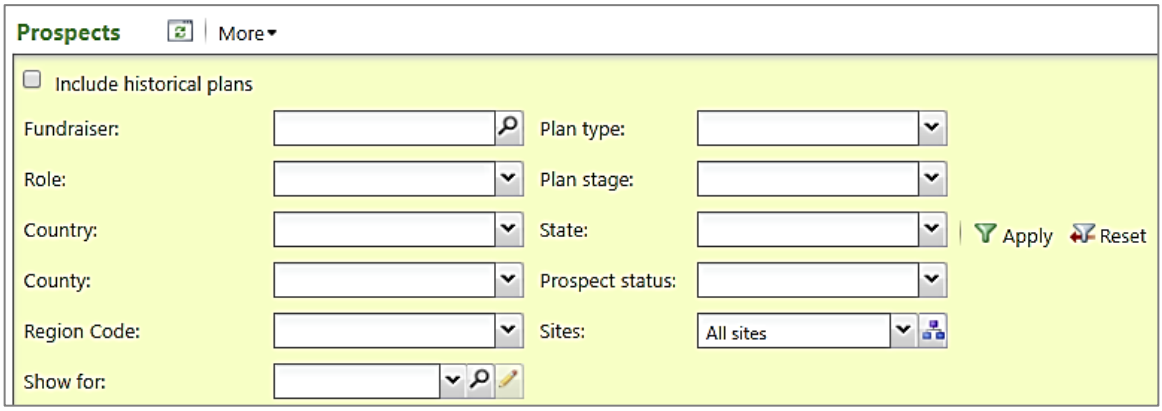
In the **Breakdown of selected plan type** area, it is possible to further refine the review of plan types. Selecting a specific plan type from the drop-down menu will display a breakdown of that specific plan type by stage. This can assist a fundraiser in understanding what stage in the prospect management process the majority of a specific plan type is currently in.



Select the stage to display a list of plans associated with both the plan type and the selected stage. Plans with **No current stage** are plans with no pending or completed steps; thus, the plan itself does not have a stage.

When a role type, plan type, or plan stage has been selected, a new **Prospects** page will display.

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Use the available fields to filter, refine, and review the available plans associated with the fundraiser's portfolio.

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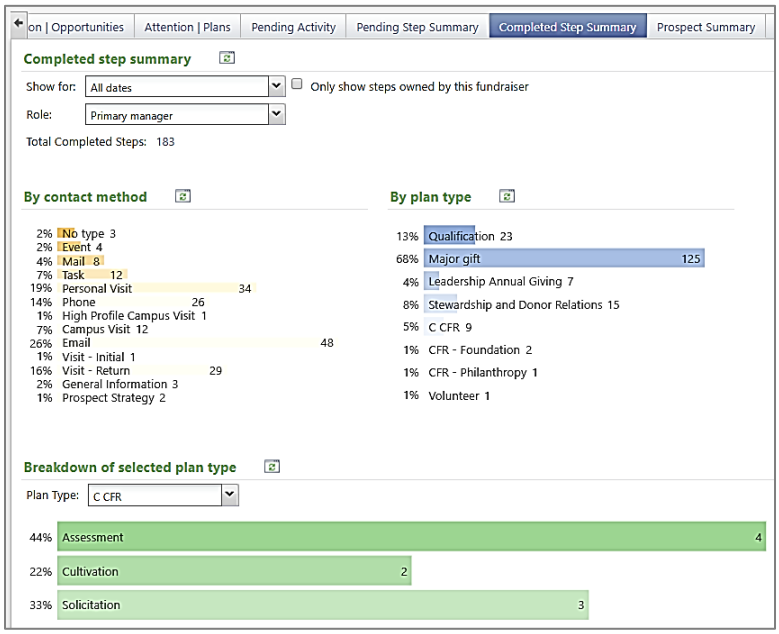
STEP SUMMARY TABS (FUNDRAISER PAGE)

USING ALL ASPECTS OF THE FUNDRAISER PAGE

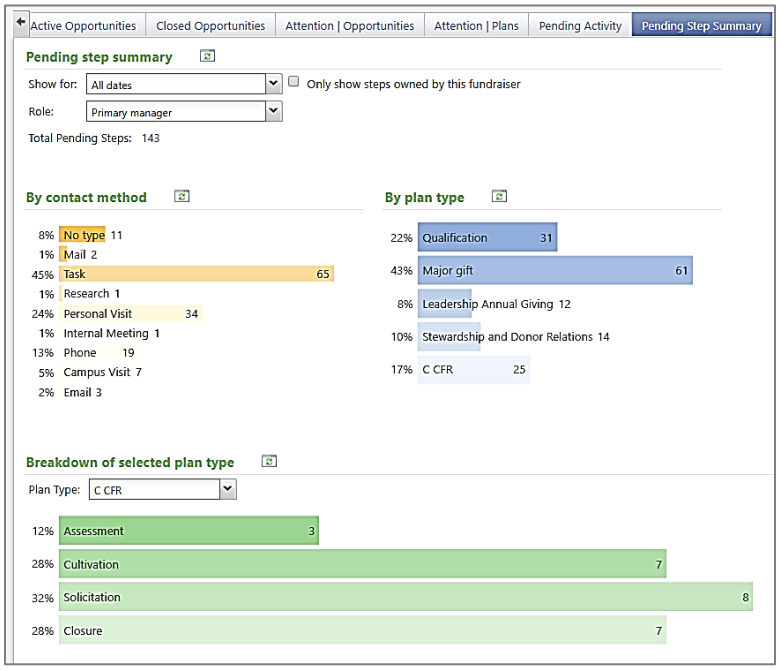
The **Pending Step Summary** and the **Completed Step Summary** tabs function in almost identical ways. Each shows a summary of steps from a fundraiser's plans that can be drilled into to create more detailed reports.

Summary

The **Pending Step Summary** tab can help the fundraiser analyze their upcoming prospect management activities by displaying steps by contact method, type, and the plan stage.



The **Completed Step Summary tab** can help the fundraiser analyze their prior prospect management activities by displaying steps by contact method, type, and plan stage.

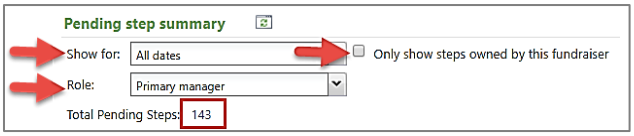


Each contact method and plan type can be selected to display a report detailing all pending or completed steps for that specific method or type.

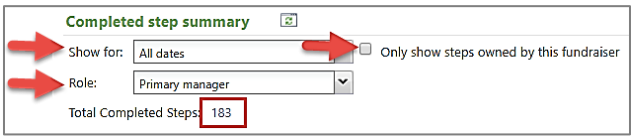
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Reading the Step Summary Tabs

Select any of the date options from the **Show for:** drop down to determine what is displayed below.



Select the **Only show steps owned by this fundraiser** option to limit the information displayed below.



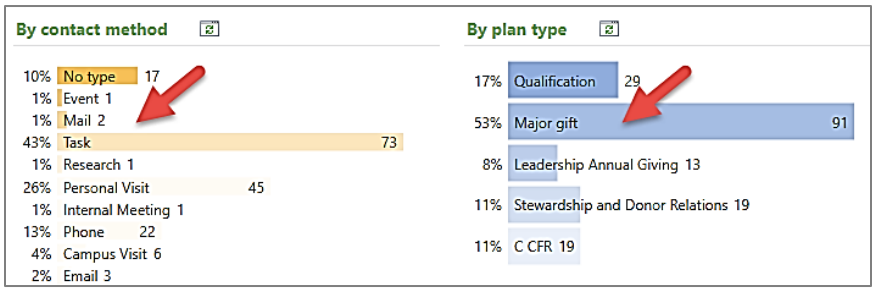
Select either Primary manager or Secondary solicitor from the **Role** drop-down to determine what is displayed below. Primary manager and Steward on Stewardship Plans will also appear as options here if the fundraiser has Stewardship plans (located below Prospect Plans in fundraisers' portfolios).

Click on the blue number next to either the **Total pending steps** or the **Total completed steps** field for a complete list of all steps based on the selected criteria selected from the Pending step or Completed step summary areas.

By Contact Method or Plan Type

The **By contact method** section of either step summary type breaks down the total number of plan steps the fundraiser is associated with by the method of contact assigned to the step. This section displays the number of plan steps associated with the specific contact method. It will also display the percentage of the plan steps that make up that contact method type.

The **By plan type** section of either step summary type breaks down the total number and percentage of plan steps the fundraiser is associated with by the type of plan to which the step has been assigned.

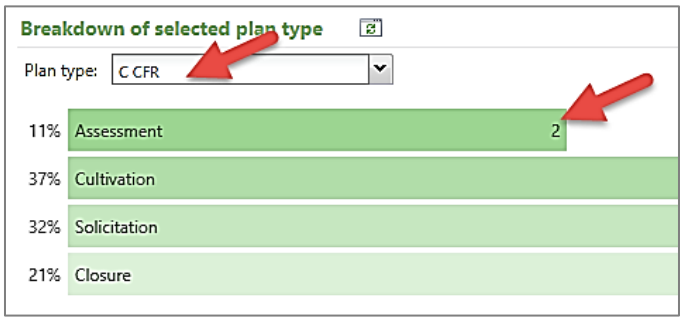


For either section clicking on the contact method or the plan type will open a new report displaying all the plan steps associated with that contact method or plan type.

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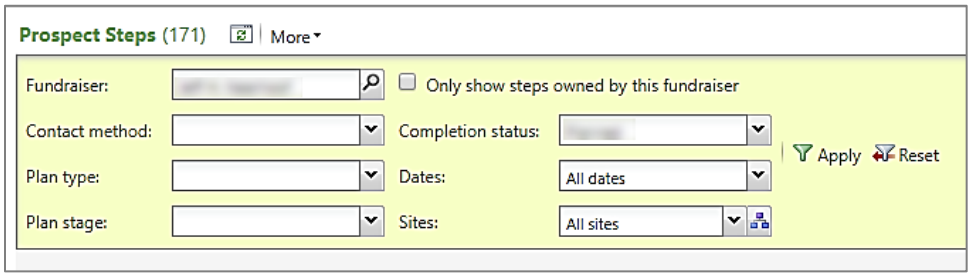
Breakdown of Selected Plan Type

The **Breakdown of selected plan type** area allows users to further refine the view of their plan steps. Selecting a specific plan type from the drop-down menu will display a breakdown of that specific plan type by stage. This view gives the fundraiser a quick snapshot of where they are in the donor lifecycle based on the plan type.



Click on the plan stage to display a list of plans associated with both the plan type and the selected stage.

Prospect Steps Detail



When users click on any of the specific contact methods, plan types, or plan stages in the Pending Step Summary or Completed Step Summary tabs, a new **Prospect Steps** page will open. The Prospect Steps page lists the plans included in the selected category from the previous screen. You may use the available fields to filter, refine, and review the available plan steps associated with the fundraiser's portfolio.

UPDATED 2/18/2025

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FUNDRAISING (STEWARDSHIP & RECOGNITION) (Blue Navigation Bar)

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FUNDRAISING MENU OVERVIEW

TOOLS FOR ADVANCEMENT OFFICERS

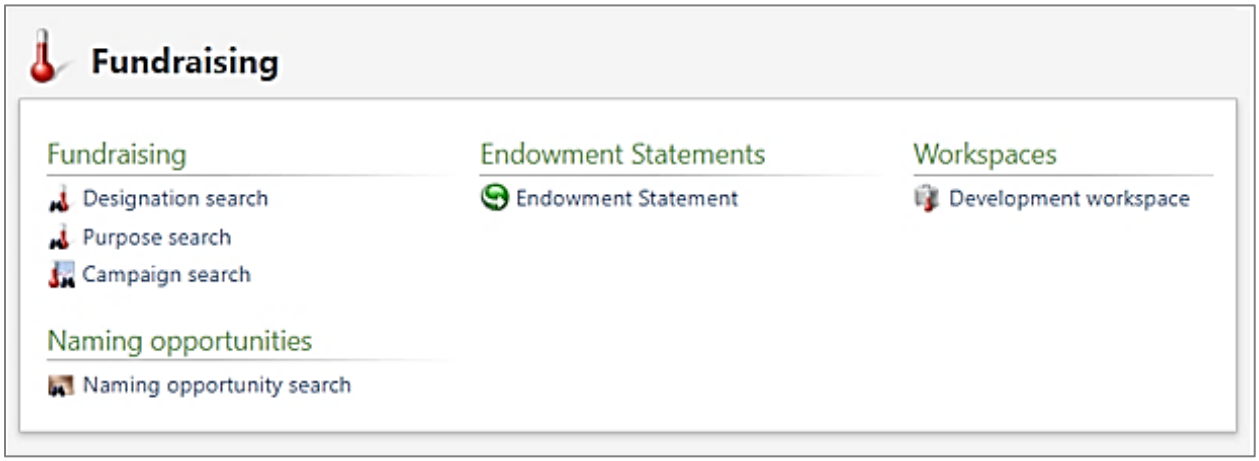
The Fundraising Menu contains links to different fundraising tools in TED an advancement officer might find useful.

Fundraising Menu



Click the Fundraising menu in the navigation bar to load a page with all available tools. You can also click the dropdown icon to the right of the Fundraising menu title to display the most commonly-used tools without loading the entire menu.

Reading the Fundraising Menu



The Fundraising Menu is divided into four areas: Fundraising, Endowment Statements, Workspaces, and Naming opportunities.

Fundraising



The **Designation search** is used when searching for gift funds, and it contains information and campaigns, fund splits, and additional information about the fund.

The **Purpose search** is used when searching information about donors, recipients, and stewardship.

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The **Campaign search** is used to search for active campaigns to which a donation can be tied.

Endowment Statements



The **Endowment Statement** button displays a table of funds that have endowment statements associated with the fund. Blue links in the report will open the Fund record.

Workspaces

The **Development workspace** link opens a calendar displaying Events, Marketing efforts, Appeal mailings, and Plan activities.



This area is only used by the UIF Research and Portfolio Management. Questions regarding the area should be directed to the UIF Research and Portfolio Management team.

Naming Opportunities



Gift officers and stewardship officers can use the Naming Opportunity Search to find naming opportunities in TED. These might be active naming opportunities or ones that have been named previously by donors. The naming opportunities search results may include named spaces, scholarships, faculty positions, programs, and others.

REVIEWED 10/16/24

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FUNDRAISING PURPOSE – ADD A RECIPIENT

HOW TO ADD SCHOLARSHIP AND OTHER FINANCIAL BENEFIT RECIPIENTS

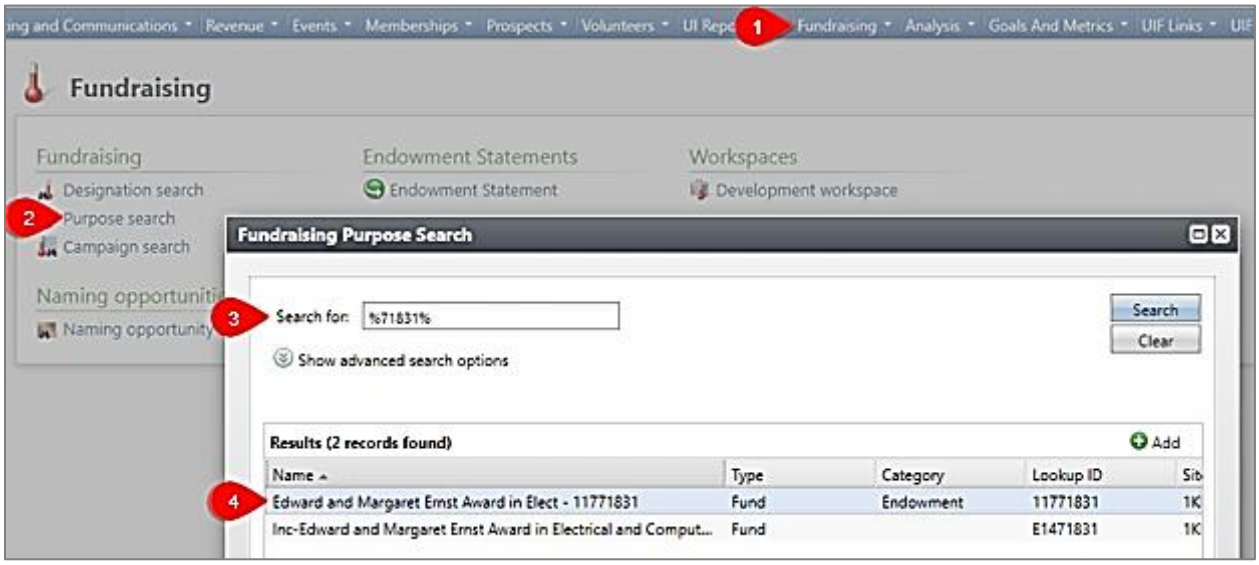
This document outlines the steps to add scholarship and other financial benefit recipients to purpose records (aka funds) in TED.

Completing the Recipient Form

Constituents who received a monetary benefit from a University of Illinois Gift Fund (Purpose/Designation) are recorded on the Recipients tab of a Fund Purpose in TED.

Constituents who received an award, scholarship, or other honor that is not tied to a University of Illinois Gift Fund (Purpose/Designation) are recorded as members of a committee named after the award or honor.

To add a recipient on the Recipients tab of a Fund Purpose, use the following steps:



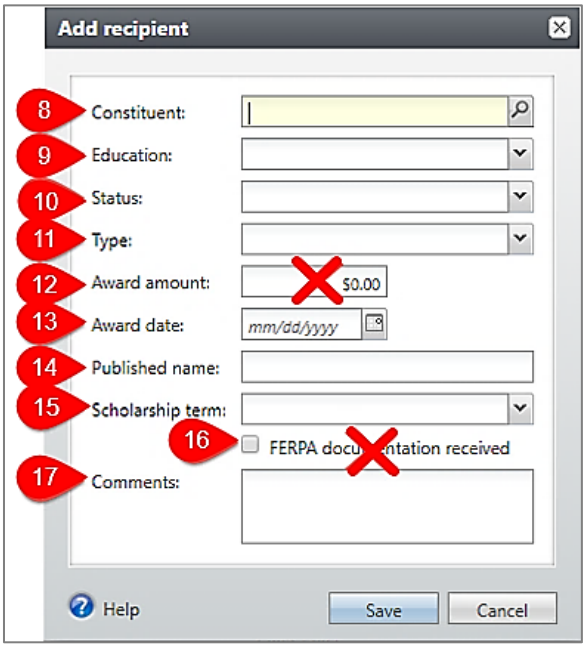
1. Click **Fundraising** in the upper blue navigation bar.
2. Under the **Fundraising** heading, click **Purpose search**.
3. Search for the Purpose you want to add a recipient to. You can search by the Name or Fund Number.
4. Click the Name of the Purpose you to which you want to add a recipient.

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5. Click the **Recipients** tab in the middle gray bar.
    a. Do not use the **Stewardship** tab for recipients. That tab tracks people who should be stewarded for the fund.
6. Make sure the person is not already listed as a recipient for the same term.
7. Click **Add.**
8. Fill in the **Constituent** name.
    a. You can type in a name. If there are multiple matches, the search window will open. Click the Name of the correct person to add.
    b. You can also search directly by clicking the magnifying glass.



9. Select the appropriate **Education** record.
    a. For example, if someone has a degree from UIC and UIUC, and the award is given by the College of LAS at UIUC, select the UIUC degree.
10. Select a **Status**.
    a. Accepted
    b. Awarded
    c. Unknown
11. Select the **Type**.
    a. Chairs
    b. Closed
    c. Conference/Seminars/Workshops
    d. Facilities
    e. Faculty Awards/Prizes
    f. Faculty Fellowships
    g. General Student Support
    h. Grad Student Fellowships
    i. Multiple Programs
    j. Professorships
    k. Program/Course Development
    l. Research
    m. Research Unrestricted
    n. Scholarships
    o. Scholarship/Fellowship/Awards
        i. Note: This value is for use only when a combination of two or more of these values are needed to denote a mixed type containing some combination of scholarship, fellowship, and award.



p. Specific Programs

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q. Student Awards/Prizes

r. To Be Determined

s. Unrestricted to Units

12. Do not use the **Award amount** field. This is FERPA-protected information and should not be stored in TED.
13. Fill in the **Award date**.
    a. If the exact award date is unknown, use a date within the time period for which the constituent is being honored.
14. Fill in the **Published name**.
    a. The official name of the award. The Published name is how we can distinguish multiple awards from one another if a Purpose gives out multiple awards.
15. Select the **Scholarship term**.
    a. This should reflect the academic year in which the award date falls.
16. Do not use the **FERPA documentation received** box.
17. Fill in a **Comments** as appropriate.

REVIEWED 4/14/25

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FUNDRAISING PURPOSE – ADD STEWARDSHIP RECIPIENT

TRACKING THE NAMES OF DONORS WHO ARE STEWARDED IN A FUND

The Stewardship Recipient feature allows users to associate key donors and friends with specific funds. This enables easy tracking of people who are to receive special stewardship, other than Endowment Statements.

Stewardship Recipients on a Purpose should be tagged as 'DR Plan Participants' and should be added as individuals only.

Constituents who are connected to a fund indirectly that will not be part of a stewardship plan should be tagged with the type 'Association with Fund'.

Add a Stewardship Recipient

To add a Stewardship Recipient to a Fund Purpose, use the following steps.

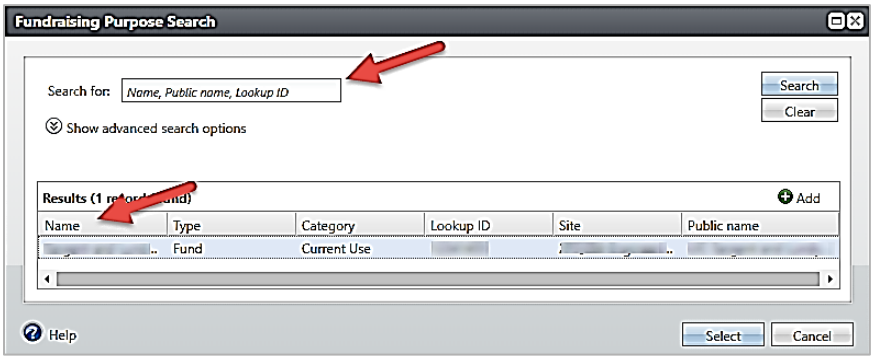
1. From the **Fundraising** tab, under the **Fundraising** header, select **Purpose Search**. This will open the **Fundraising Purpose Search** window.



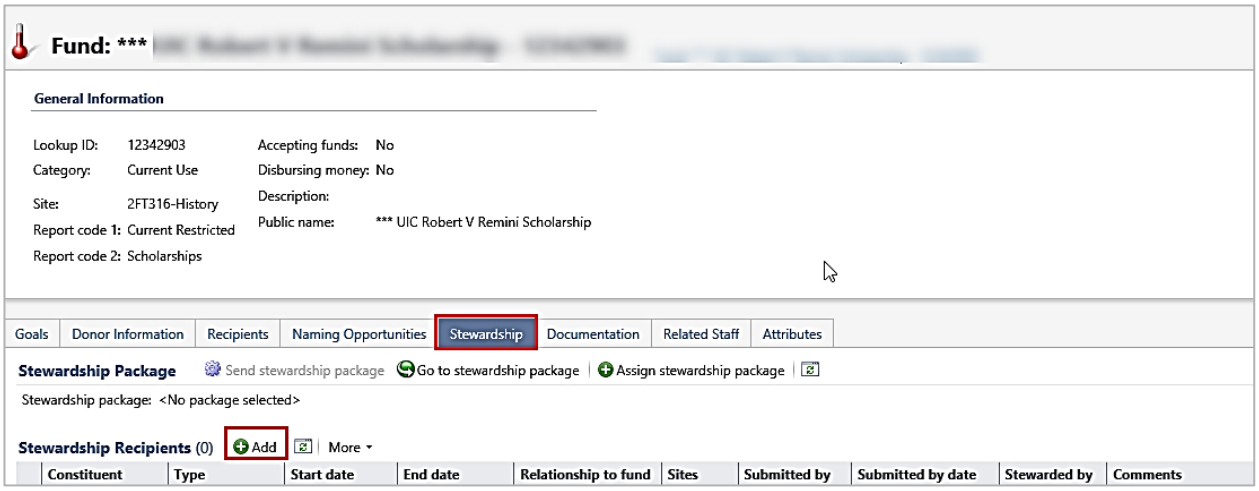
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2. Use the search option to find the **Fund Purpose** to which the recipient will be added. Searches can be done by Fund name or Fund number. Use a wildcard (%) before and after your search term.

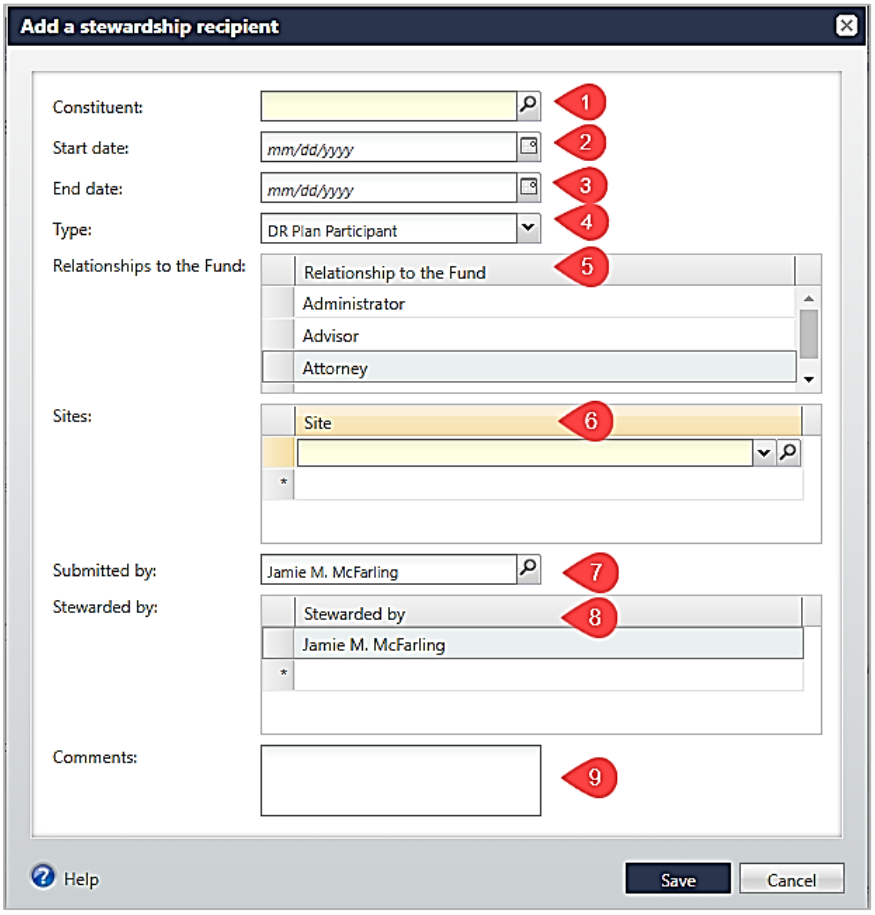


3. Select the name of the **Fund Purpose** to which the recipient will be added. This will open the Fund record.
4. Click the **Stewardship** sub tab and then select **Add** in the **Stewardship Recipients** section. This will open an **Add a stewardship recipient** window.



18. **Constituent** - Only Individuals should be added as Stewardship Recipients**.** Use the magnifying glass in the Constituent field to open a new search window if necessary.
19. **Start date-** Fill in the appropriate **Start date** for the recipient.
20. **End date** –Fill in the appropriate **End date** for the recipient.
21. **Type -** Select DR Plan Participant or Association with Fund.
22. **Relationship to Fund-** Choose the appropriate relationship(s).
23. **Sites-** Select the appropriate site or sites**.**
24. **Submitted by -** This field defaults to the user that is logged into TED, but it can be changed as necessary.
25. **Stewarded by** -This field defaults to the user logged into TED, but it can be changed to one or more other users as necessary.
26. **Comments** - Option to add additional comments as needed. This can include an explanation of who the recipient is in relation to the fund if they are not the donor. Such as if the donor is deceased but the person who oversees the trust wishes to receive stewardship materials.

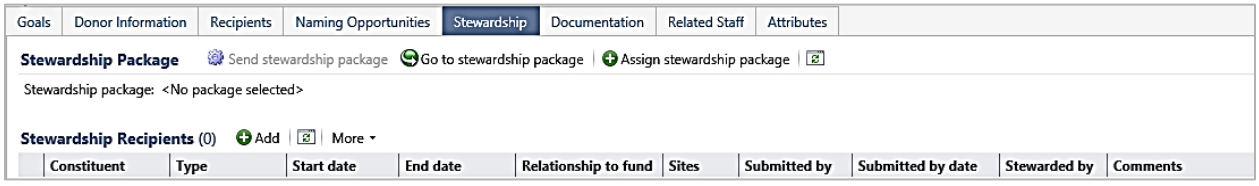
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Complete adding the recipient by selecting **Save**.

Once an individual has been added as a Stewardship Recipient, the information will display in two locations.

From the **Purpose Stewardship** sub-tab



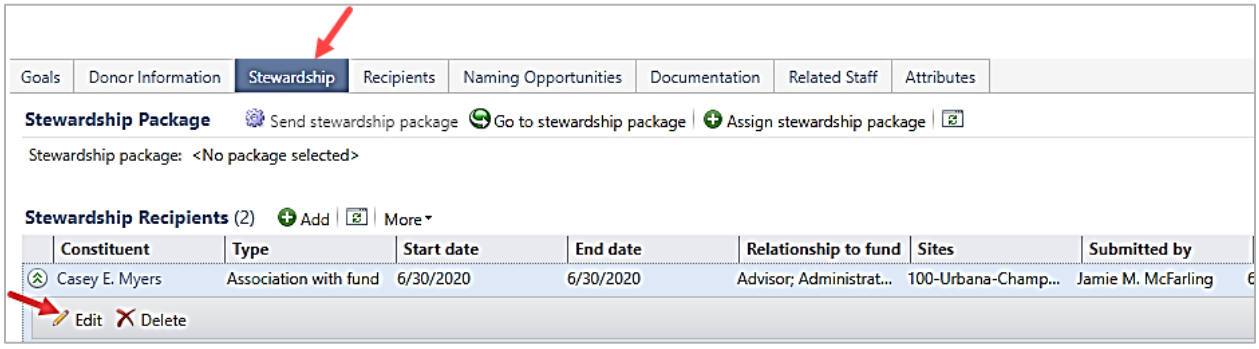
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On the individual constituent's record from the Relationships tab/the **Fund Purpose Stewardship** sub-tab



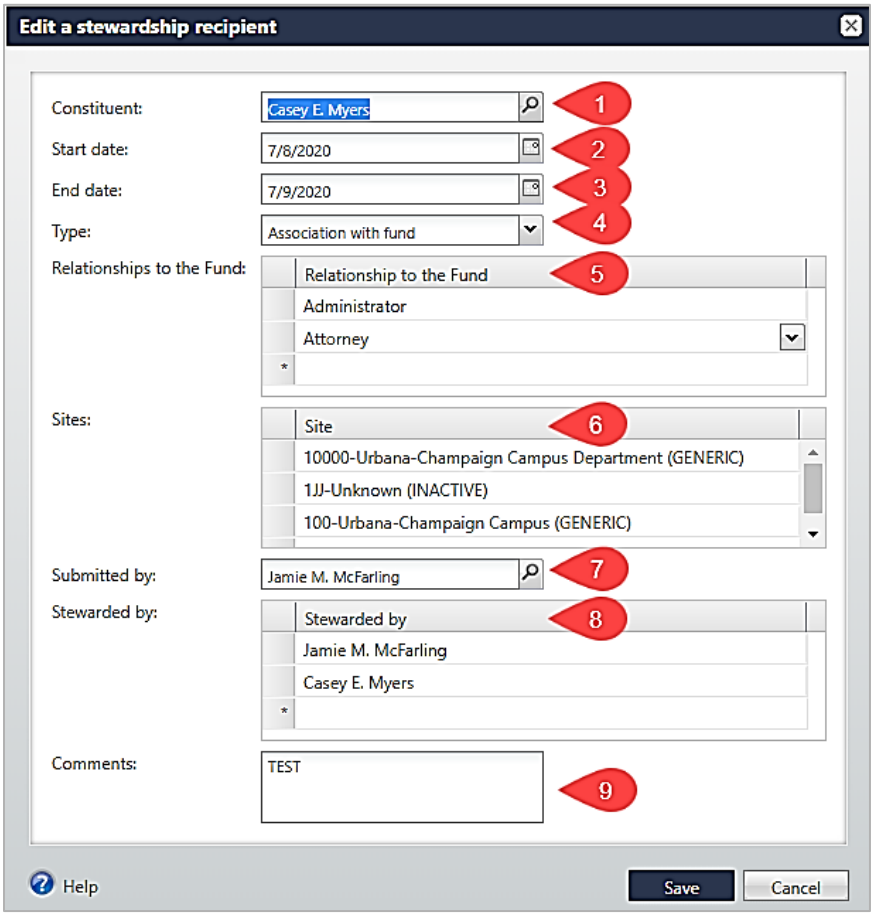
Edit a Stewardship Recipient

On the **Stewardship** sub-tab, under **Stewardship Recipients**, click on the **Edit** button next to the constituent's name that needs modified. This will open the **Edit a stewardship recipient** window.



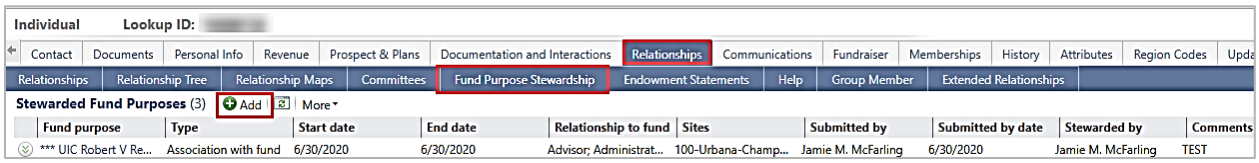
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Note: Edit a Stewardship recipient shares the same fields as Add a Stewardship recipient and all fields can be edited. See above for definitions of fields.



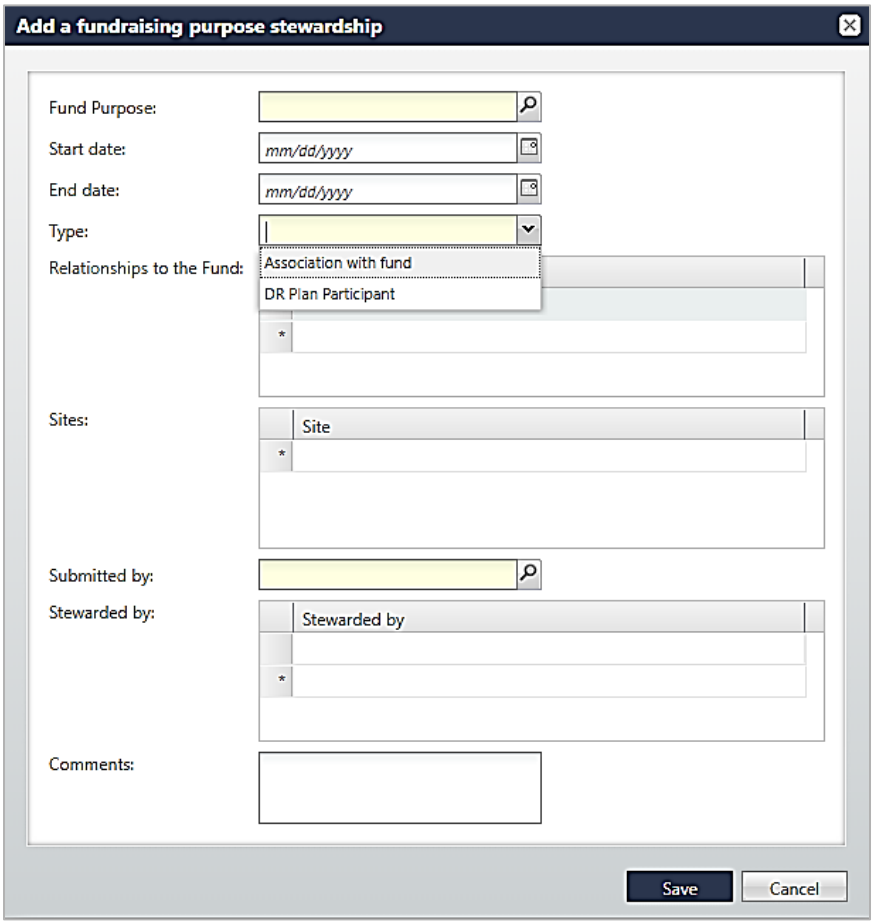
Adding a Fundraising Purpose Stewardship

From the constituent's record, click on the **Relationships tab**, **Fund Purpose Stewardship** sub-tab and choose **Add**. This will open the **Add a fundraising purpose stewardship** window.



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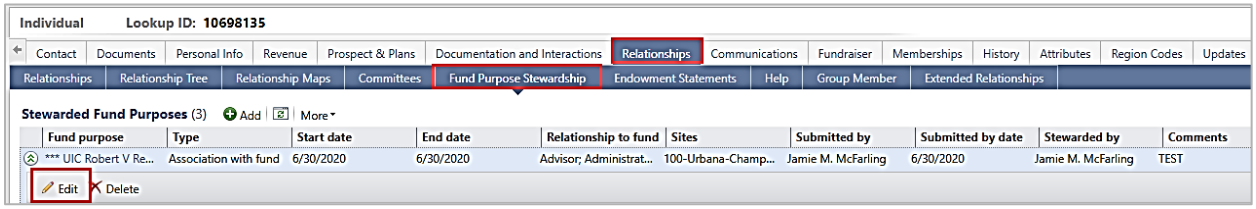
Note: Add a fundraising purpose stewardship shares the same fields as Add a Stewardship recipient and all fields can be edited. See above for definitions of fields.



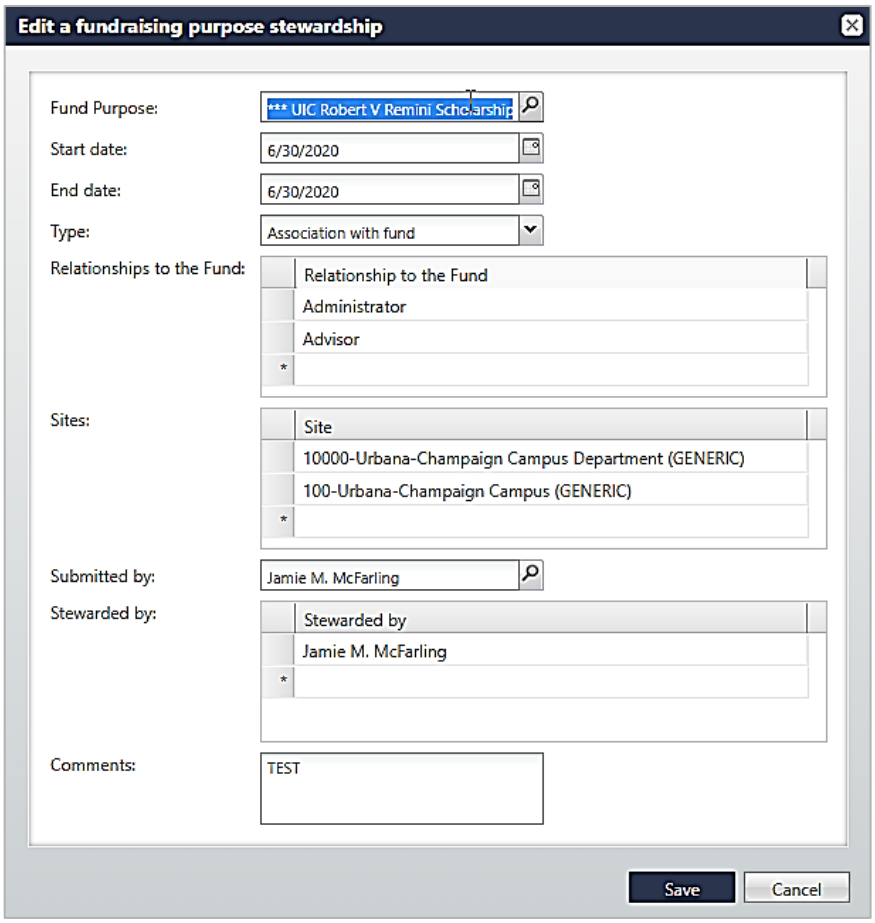
Editing a Fundraising Purpose Stewardship

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From the constituent's record, click on the **Relationships** tab, **Fund Purpose Stewardship** sub-tab and choose **Edit**. This will open the **Edit a fundraising purpose stewardship** window.



Note: Edit a fundraising purpose stewardship shares the same fields as Add a Stewardship recipient and all fields can be edited. See above for definitions of fields.



REVIEWED 10/16/24

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HISTORY AND UPDATES TAB

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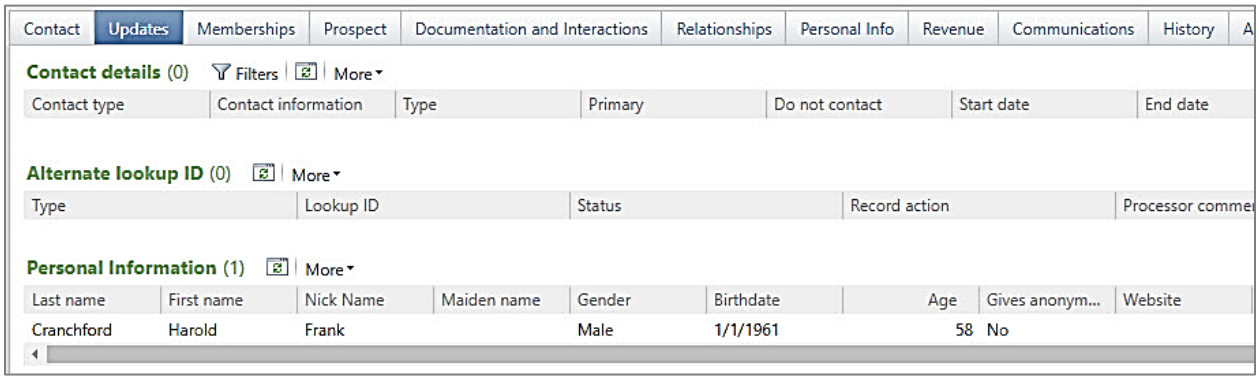
UPDATES AND HISTORY TABS

CHANGES TO CONSTITUENT RECORDS

The Updates tab and History tab located on a constituent record display certain pending and historical changes on that constituent.

Updates Tab

Bio Feedback submissions (add or edit) that have not been processed appear on the updates tab of the constituent record. After AIMS processes a Bio Feedback entry, they will no longer appear on the Updates tab.



In addition, this notification displays on the record above the summary tiles.



History Tab

Many, but not all, data changes, display on this tab. Options are available to filter this report by:

- Field type
- User
- Date(s)
- Action (Add, Edit, Delete or All)

UPDATED – 8/23/24

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MEMBERS TAB

Documentation to be Determined

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MEMBERSHIPS TAB

Please refer to Blackbaud 4.0 documentation.

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PERSONAL INFO TAB

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PERSONAL INFO TAB

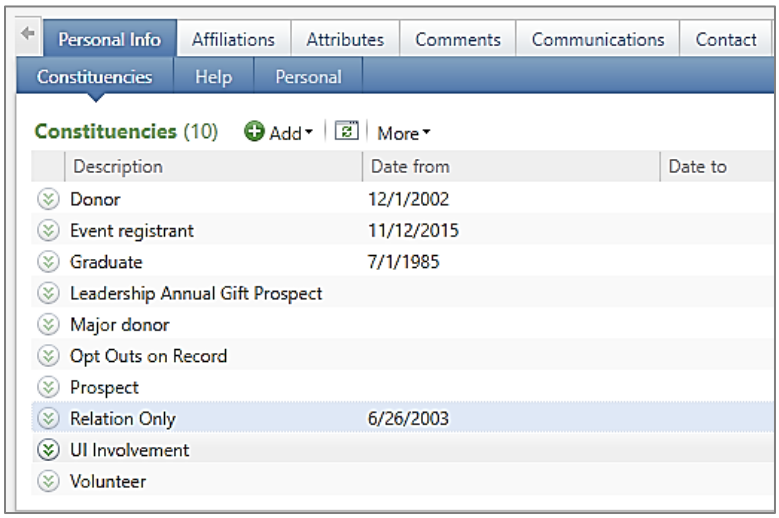
READING CONSTITUENT INFORMATION

The Personal Info tab contains the following sub-tabs:

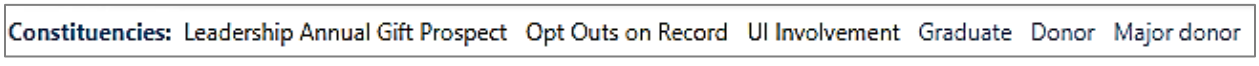
- Constituencies subtab – Lists the constituencies associated with that constituent.
- Personal subtab sections include:
  - Personal information
  - Name Formats
  - Aliases
  - Demographics
  - Standard Occupational Classification
  - Alternate lookup IDs
  - Interests
  - Event restrictions

Constituencies Sub-Tab

Constituencies are used to classify and organize constituents. While not required, Constituencies may have from and to dates associated with them. All users have access to view constituencies.



The majority of the constituencies listed on the subtab will also appear in the constituencies list in the upper portion of the constituent record.



Constituencies are assigned to individual constituents in one of two ways. Some constituencies are automatically assigned by the system based on previously entered information, while others are

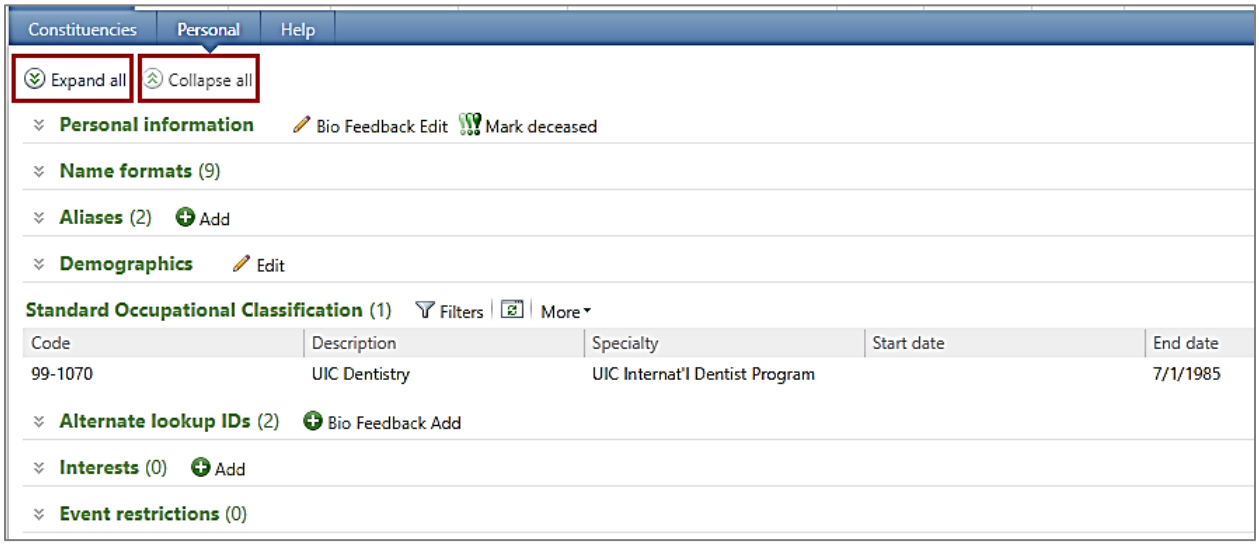
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updated through overnight processing. UIF Advancement Information Management & Support has access to add constituencies directly.

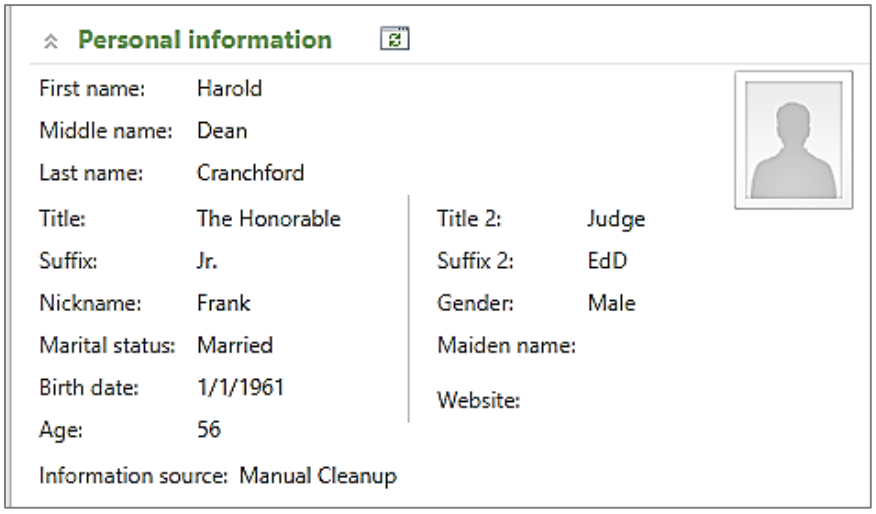
For a complete description of all possible constituencies (38), see the Constituencies Overview course and documentation.

Personal Sub-Tab

Important basic information is housed on the Personal subtab in sections that can be expanded or collapsed.



Personal Information Section



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Field	Description
First Name Middle Name Last Name	Last name and first names are required fields, middle name is optional. Name fields are used for searches, reports and communications.
Title Title 2	When entered, title will display before the name on the upper portion of the constituent record. Title fields are used in communication such as email, correspondence and newsletters. This can include common titles like Ms. or Mrs. or job-specific titles, such as Dr. or government and military titles. Title and Title 2 use the same table and allow flexibility when more than one title is needed – such as *The Honorable* and *Judge*.
Suffix Suffix 2	When entered, a suffix appears after a name in communication such as email, correspondence and newsletters. Suffix fields are used in communication such as email, correspondence and newsletters. Suffix and Suffix 2 use the same table and allow flexibility when more than one suffix is needed – such as *Jr.* and *MD.*
Nickname	The nickname field can be used to track a name such as *Bob* with a first name of *Robert.* Nicknames can be used in searches and communication.
Gender	Options are Male, Female, Unknown
Marital Status	Options are Divorced, Life Partner, Married, Separated, Single, Unknown, Widow/er.
Maiden Name	Optional field to track a name before marriage. When entered, the maiden name entered appears as an alias.
Birth date	The individual's date of birth, format mm/dd/yyyy. Birthdates are not entered in TED for minors (under 18).
Age	This is a calculated field based on birth date field and the current date.
Website	A personal website url can be stored here and will display as a link to the website.
Information source	While not a system required field, best practices dictate that information source should always be selected. Each time a record is updated the most recent information source supplied will display here. See the Information Source Documentation for the complete list.

An image can be stored on a constituent record and will display on the Personal subtab and the upper section of the constituent record. Photos must not contain any copyrighted material. They should also be the constituent's full face in portrait orientation.

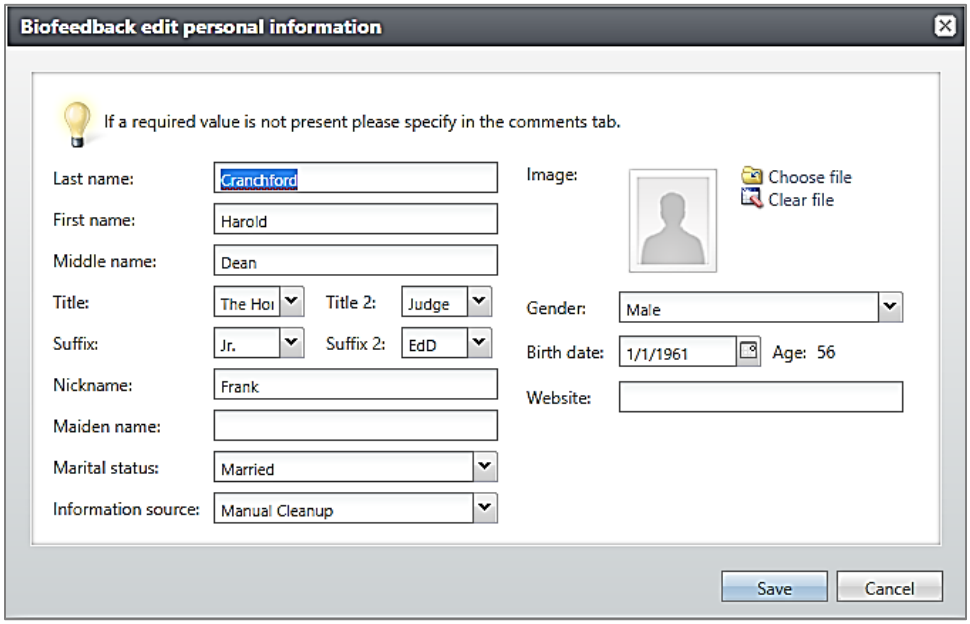


Some users have access to additional features under the Personal tab than those shown below.

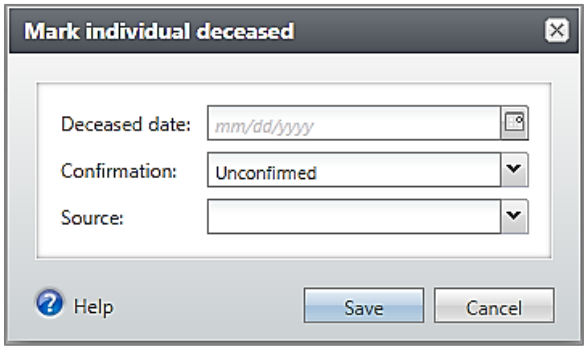


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Bio Feedback Edit allows users to submit updates to any fields in the Personal Information section. An image file of the constituent can be submitted using the Bio Feedback Edit feature.



Mark Deceased

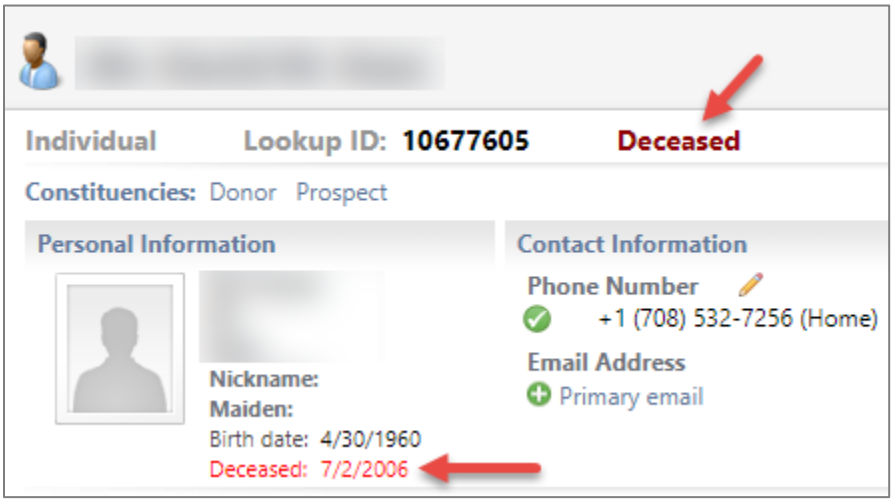


Mark deceased option allows users to submit a death notification to the UIF Advancement Information Management & Support team for verification. It is the responsibility of all users to report these important updates as they become aware of them.

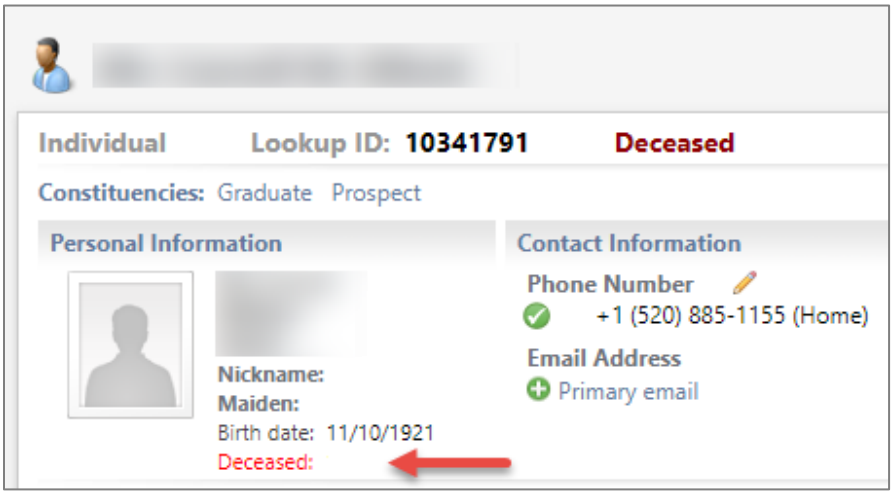
Include the deceased date (if known), the confirmation field should be Unconfirmed when entered. This will be changed to Confirmed by the UIF Advancement Information Management & Support department when the request is processed. The source of information should always be included in the request.

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When the request is processed, the system will add the term **Deceased** to the top of the record next to the constituent's Lookup ID as well as in the Personal Information summary tile. If the Deceased date is known, it will appear in red lettering to the right of the word Deceased in the tile.

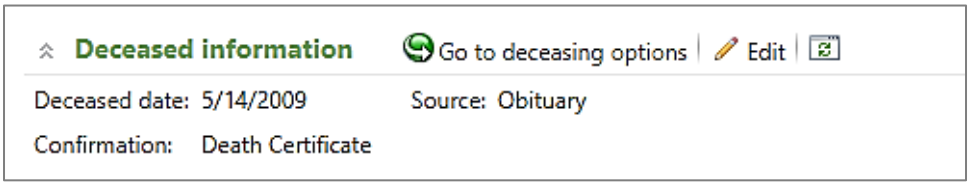


If the Deceased date is not known, the word Deceased will appear in red lettering with a blank field for the date.



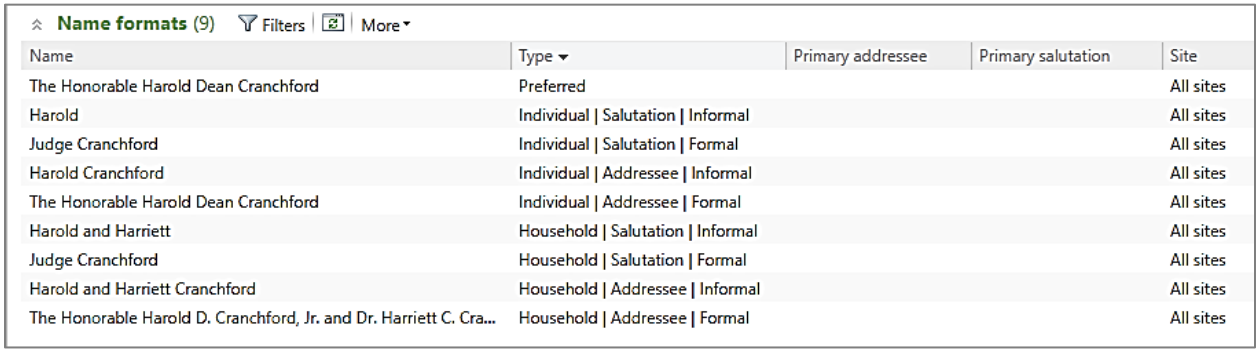
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On the Personal info tab, a **Deceased Information** section will appear.



Note: The Deceased date will be left blank if the date of death is not confirmed.

Name Formats



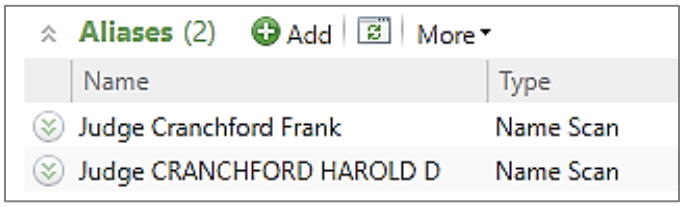
Name	Type	Primary addressee	Primary salutation	Site
The Honorable Harold Dean Cranchford	Preferred			All sites
Harold	Individual | Salutation | Informal			All sites
Judge Cranchford	Individual | Salutation | Formal			All sites
Harold Cranchford	Individual | Addressee | Informal			All sites
The Honorable Harold Dean Cranchford	Individual | Addressee | Formal			All sites
Harold and Harriett	Household | Salutation | Informal			All sites
Judge Cranchford	Household | Salutation | Formal			All sites
Harold and Harriett Cranchford	Household | Addressee | Informal			All sites
The Honorable Harold D. Cranchford, Jr. and Dr. Harriett C. Cra...	Household | Addressee | Formal			All sites

Name formats are used throughout the system as a way to let units choose how to address each constituent. For example, for some correspondence it might be more appropriate to use formal salutations, while for others you would use informal salutations.

Each constituent record will have multiple formats of the name for marketing and communication purposes and can be changed by contacting your unit's Annual Giving Office.

Changes made to the name fields will update all the appropriate name format with the exception of any custom name formats. It's important to notify your unit's Annual Giving Office of any changes needed to a custom name format.

Aliases



Aliases are an alternate way to search for a record in TED. For international constituents, it is important to include all versions of the names you may know them by in the Alias field. This will allow for more complete search results.

Users with the appropriate access will have the Add option which allows users to add additional aliases to the record.

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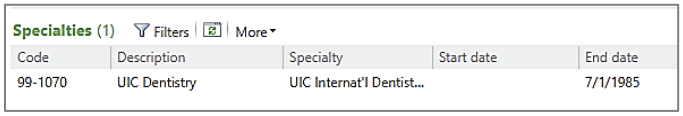
Demographics



Demographics (ethnicity and religion) are collected for market segmentation purposes. Information source indicates where the information originated from.

Users with the appropriate access will have the Edit option which allows users to edit Ethnicity and Religion.

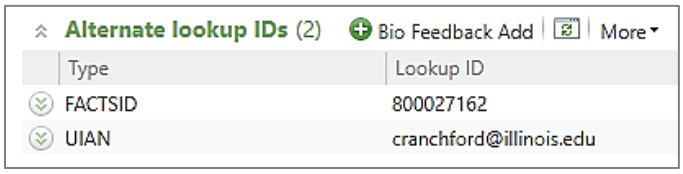
Specialties



This field is used to store a constituent's specialty during his/her UI residency. It can also be used to store information on the constituent's current area of practice. Detailed information on the constituent's UI residency specialty or the constituent's current area of practice is not stored in either the University Appointment associated with the residency or the constituent's employment relationship.

Currently this field is only used by Health Sciences and Law. Units needing to track a specialty that is not tracked elsewhere in TED can do so by submitting a ticket through the UIF IT Services Portal located under UIF Help in the blue navigation bar in TED.

Alternate Lookup IDs

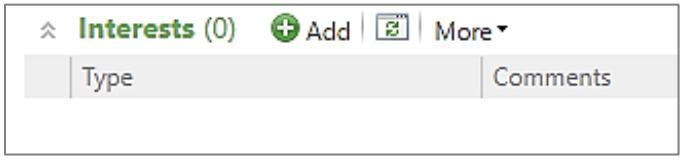


Alternate Lookup IDs can be used to search for a constituent in TED. The Alternate Lookup IDs allows for several different units to have a unique code for the constituent.

Users with the appropriate access will have the Bio Feedback Add option to allow additional Alternate Lookup IDs to be submitted

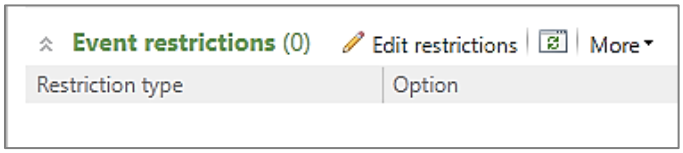
See Alternate Lookup IDs documentation for the complete list.

Interests



The Interests section of the Personal Information subtab contains a list of funding interests. Users with the appropriate access can add additional interests using the Add option.

Event Restrictions



Event Restrictions can be added to a constituent's record with the Edit restrictions option by users with the appropriate access.

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Restrictions include:

- Allergy Restrictions
- Dietary Restrictions
- Hearing Impaired
- Mobility Impaired
- Other Special Needs
- Vision Impaired

Options are available within each restriction type to specify the restriction.

UPDATED 5/2/25

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UPDATING NAME INFORMATION

HOW-TO UPDATE NAME INFORMATION AND CONSIDERATIONS

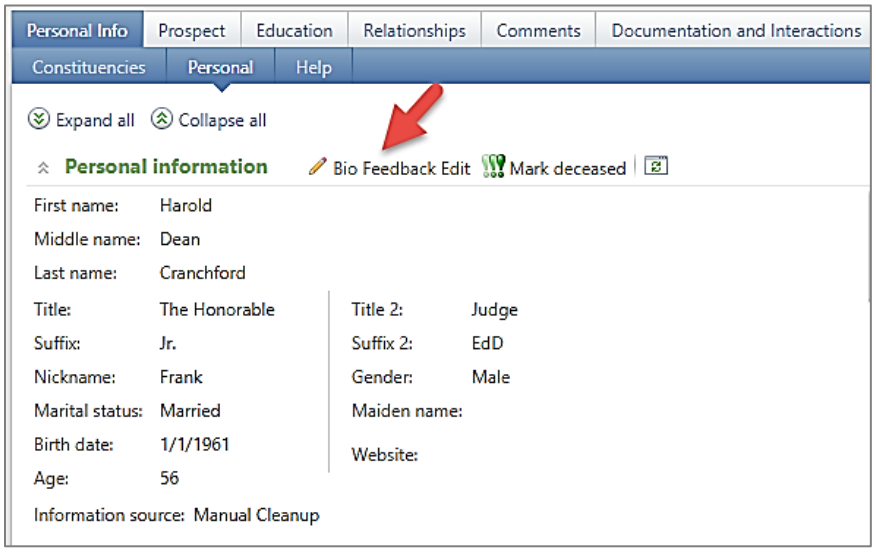
Name information is located on the Personal Info tab, Personal sub-tab. Users with appropriate access can submit name changes to a constituent record using Bio Feedback Edit.

Name Fields Available to Edit

- First name
- Middle name
- Last name
- Title
- Title 2
- Suffix
- Suffix 2
- Nickname
- Maiden Name

All fields are freeform text fields, except for both Title and Suffix fields which are drop down lists. Title and Title 2 use the same drop-down list. Suffix and Suffix 2 use the same drop-down list.

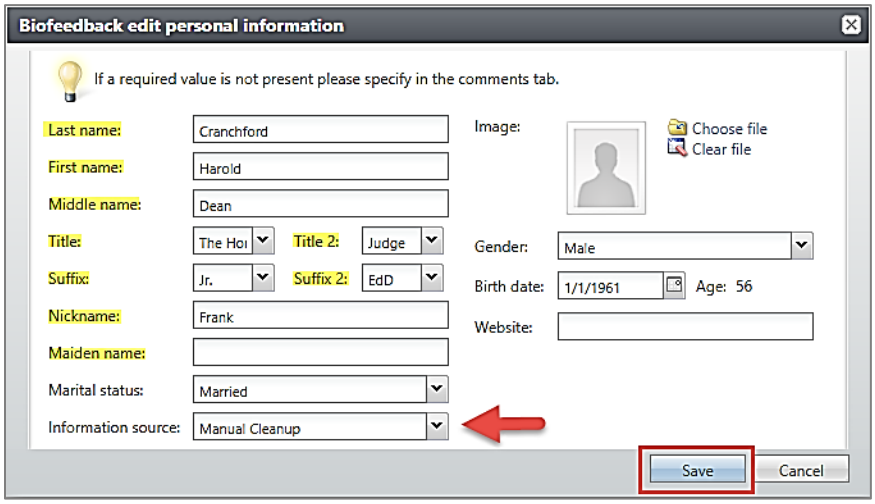
Updating Name Information



1. Locate the correct constituent record.
2. From the Personal Info tab, Personal sub-tab, select Bio Feedback Edit.

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3. Update any of the highlighted name fields.
4. Specify an Information source.
5. Save



When an edit is saved, a notification “Biofeedback Pending Updates” displays on the constituent record until it is processed. After it is processed then the notification is no longer displayed on the record.

These edits are processed by Advancement Information Management and Support (AIMS) and users will receive an email when the update has been processed, usually within 5 business days. Users will also receive an email letting them know why if the change is rejected.

Additional Considerations

Aliases are an additional option on the Personal Info tab for storing names that don’t fit into the other name fields. A constituent can have multiple aliases, and these can be used in the search screens. See the Alias documentation for more details. AIMS will add an alias if a nickname is added.

Name formats are updated automatically when a name change is processed. The exception to that is any custom name formats which will not be updated.

****IMPORTANT****

Users that make a name change should notify their Annual Giving office if a custom name format on the constituent record needs to be changed.

REVIEWED 8/11/24

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ALIASES

ADDITIONAL NAME OPTIONS

Aliases are an additional option on the Personal Info tab used for searching. For an individual constituent, an alias can be a former name, a stage name, an alternate name, or a nickname not captured on the Personal Tab. For an organization, an alias can be an acronym or a name by which the organization is commonly called.

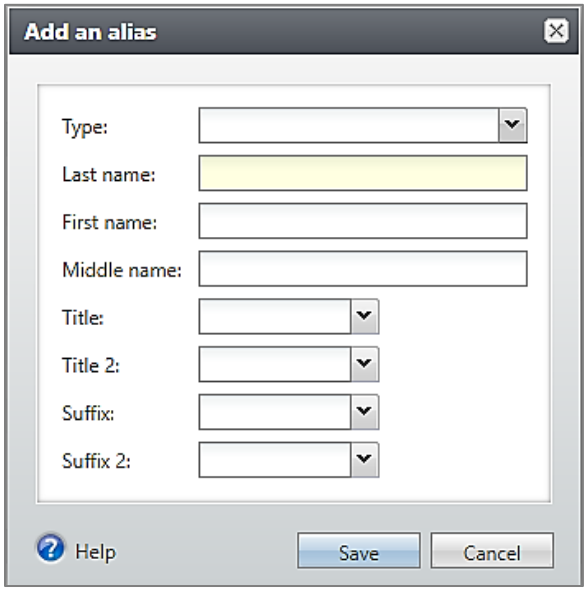
A constituent can have multiple aliases, and these can be used in the search screens using the advanced search option – check aliases.

Uses for Aliases

Aliases in all caps (type of Name Scan) converted from the legacy advancement system and are being reviewed.

New Aliases are added for additional searching options and to search for constituents who have had name changes. While constituents may have many names changes (marriage, divorce, remarriage, etc.), there should only be one TED record for the constituent. Using the alias as a search option allows the TED user to find the constituent by whichever name is known to the user.

An example of an alias is an international student where we may not know that the Americanized version of the name is a nickname and not their legal name. For example, if their birth name is Chow Yun Fat but they go by Chris Yun Fat some people may not realize that Chris is the nickname and wouldn't think to search using the nickname advanced search option. In those cases, it would be helpful to have the name in both the alias and the nickname field.



Add an Alias

Most users have access to add an Alias (or multiple aliases) directly.

1. Locate the correct constituent record.
2. From the Personal Info tab, Personal sub-tab, select Add under the Aliases section.



3. Complete the form with the type and name information.

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Types of Aliases:

- Acronym
- BBNC: Alias from Matchfinder Online
- Birth Name
- Branding
- Doing Business As
- Former Name
- Historical Name
- Legal Name
- Name Scan
- Stock Ticker Symbol

Remove an Alias

An existing alias can be edited, but to remove an alias, submit a Bio Feedback Comment from the constituent record.

REVIEWED 8/11/24

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UPDATING PERSONAL INFORMATION

MARITAL STATUS, GENDER, BIRTHDATE, WEBSITE

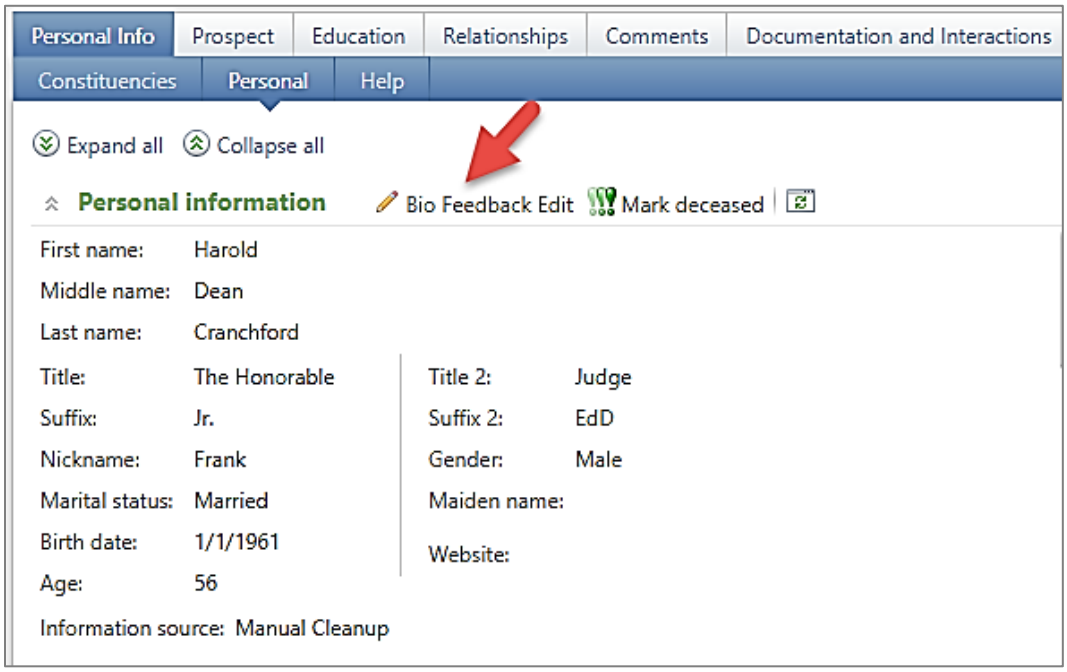
Along with Name information - Marital Status, Gender, Birthdate and Website information is located on the Personal Info tab, Personal sub-tab. Users with appropriate access can submit name changes to a constituent record using Bio Feedback Edit.

Personal Fields Available to Edit

- Marital Status (see additional considerations for divorce or marriage)
- Gender
- Birthdate
- Website

These fields are dropdown lists, except for website, which is a freeform text field.

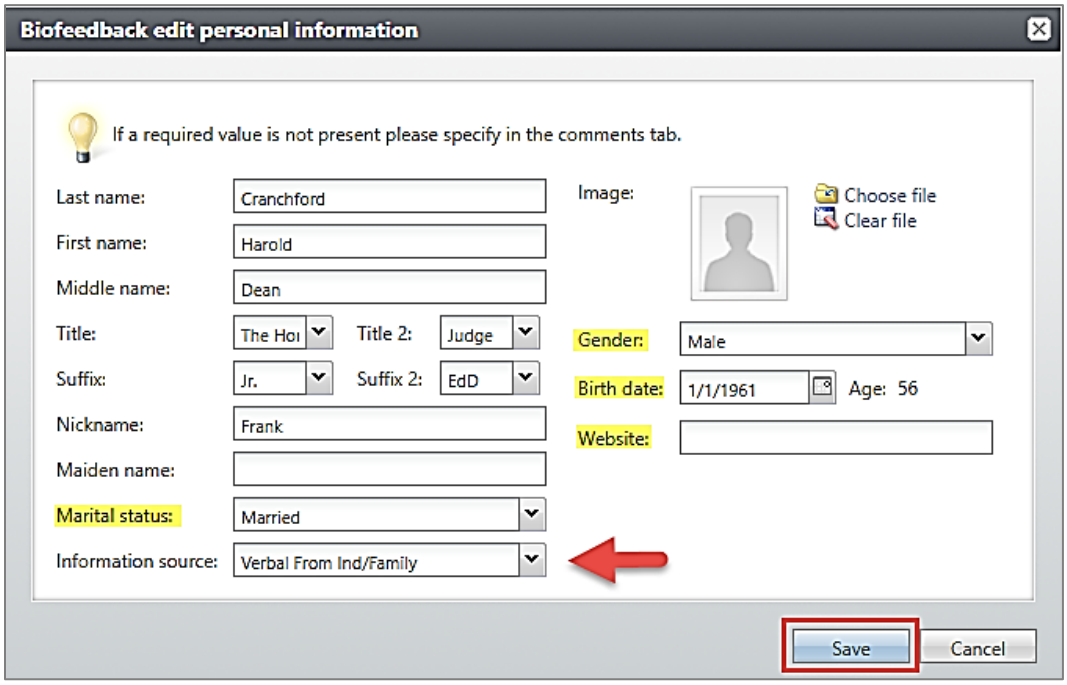
Updating Personal Information



6. Locate the correct constituent record.
7. From the Personal Info tab, Personal sub-tab, select Bio Feedback Edit.

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8. Update any of the highlighted name fields (see the additional considerations).
9. Specify an Information source.
10. Save



When an edit is saved, a notification “Biofeedback Pending Updates” displays on the constituent record until it is processed. After it is processed then the notification is no longer displayed on the record.

These edits are processed by AIMS and users will receive an email when the update has been processed, usually within 5 business days. Users will also receive an email letting them know why if the change is rejected.

Additional Considerations

Field	Description
Gender	Male, Female, Unknown

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	Updates are only processed if they were previously blank or if additional information is provided.
Marital Status	Options are - Divorced, Life Partner, Married, Separated, Single, Unknown, Widow/er. Users should not change the status to divorced or married on this field. Marriage and divorce should be requested using the Bio Feedback Add on the Comments tab. If users have additional information on maiden name or suffix change (Ms. to Mrs.) these should be added to the same request as the marriage or divorce.
Birth date	The individual's date of birth, format mm/dd/yyyy. Updates are only processed if they were previously blank or if additional information is provided to change the birthdate. Birthdates are not entered in TED for minors (under 18).
Age	This is a calculated field based on birth date field and the current date.
Website	A personal or business website URL can be stored here and will display as a link to the website. Social Media sites should on the Contact tab and will not be added in the website field.
Information source	While not a system required field, best practices dictate that information source should always be selected. Each time a record is updated the most recent information source supplied will display here. See the Information Source Documentation for the complete list.

REVIEWED 8/23/24

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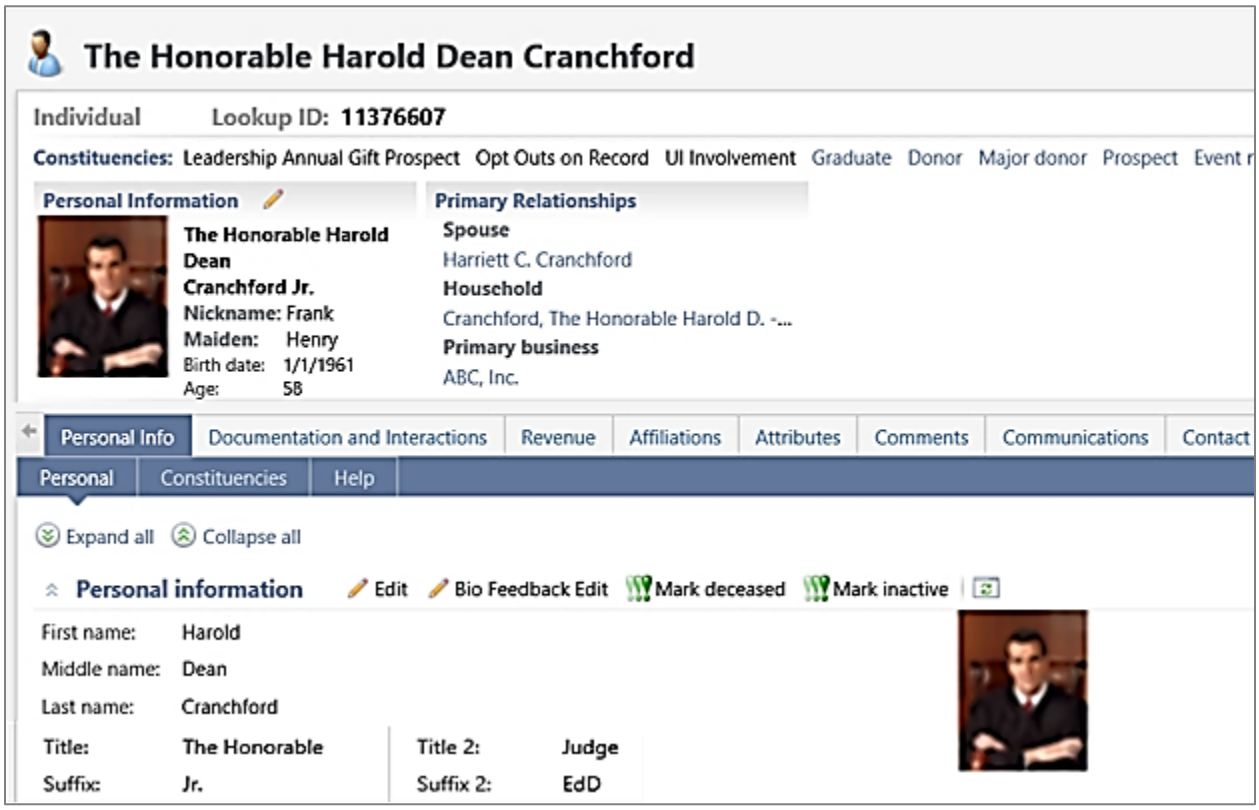
ADDING A CONSTITUENT PHOTO

HOW TO SUBMIT AN IMAGE TO DISPLAY

A picture of a constituent can be stored on his or her record. Adding an image to a constituent record could be very helpful to a fundraiser meeting with the constituent and users are encouraged to submit images following the guidelines below.

Image Display

Images that have been added will display in the Personal Information summary tile, and under the Personal Info tab, Personal sub-tab.



Adding an Image

Images can be added using the Biofeedback edit under the Personal Info tab, Personal sub-tab.

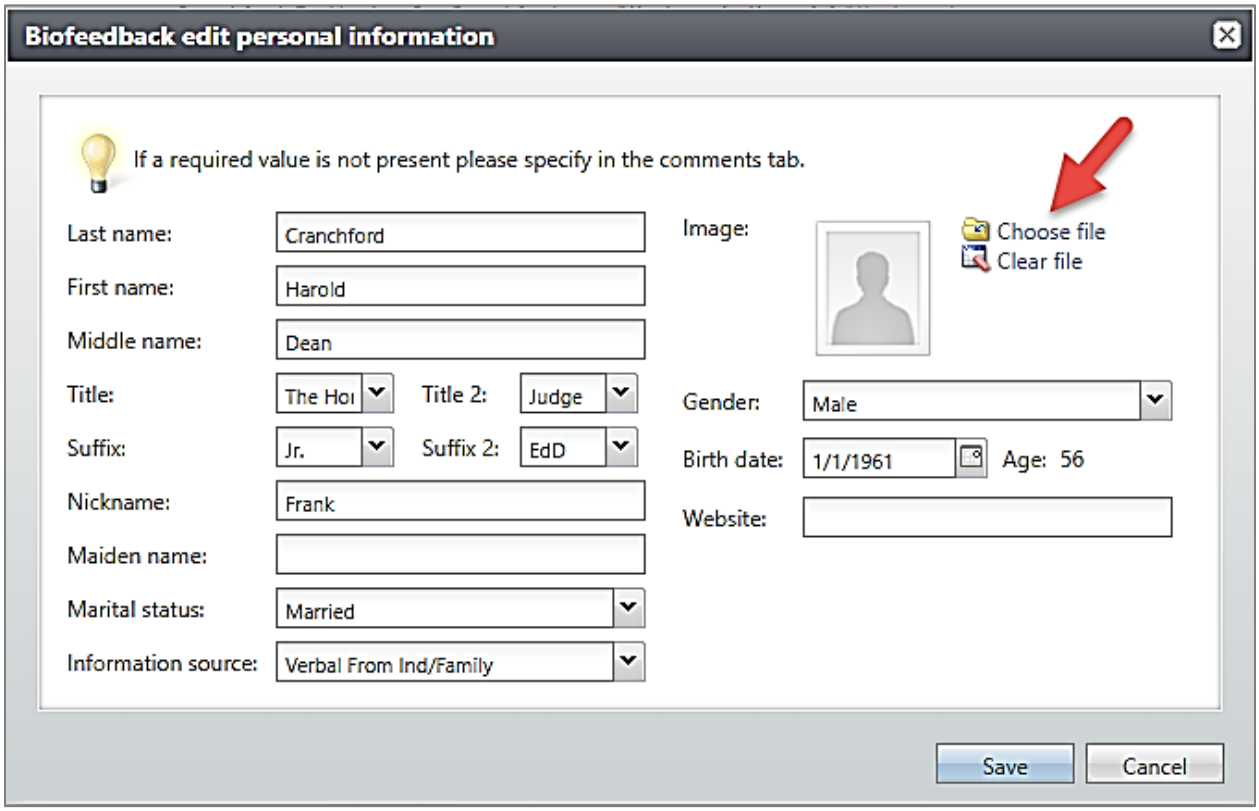
The image size should be 347-pixel x 260 pixel or 4 x 3. Images should be a clear head shot and should not include anyone but the constituent. Save the image file as a jpg or png file in a location you can access.

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Click Choose file and locate your jpg or png file.



The open screen appears so you can browse to and select the image file to use.

Click Save to submit.

AIMS will send an email when your Bio Feedback Edit has been processed.

Removing an Image

To remove an image associated with the constituent, click Clear File under the Bio Feedback Edit.

Click Save to submit.

AIMS will send an email when your Bio Feedback Edit has been processed.

REVIEWED 12/1/24

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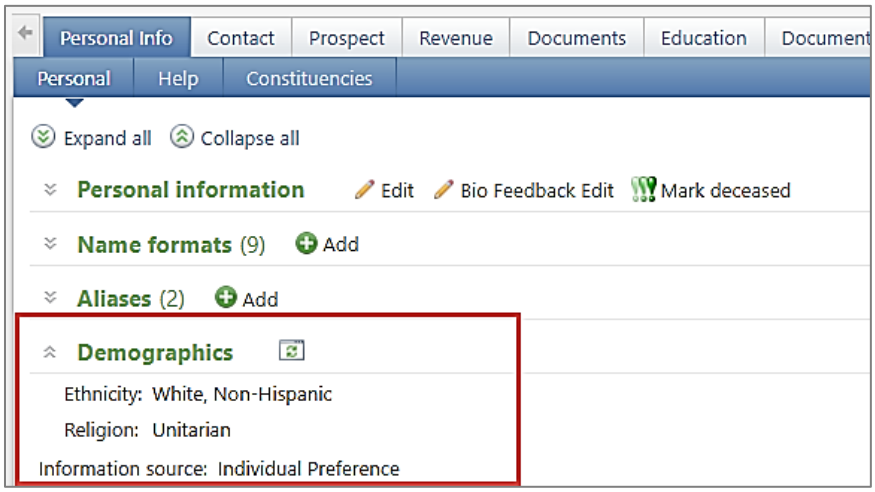
DEMOGRAPHICS

BIRTHPLACE, ETHNICITY, RELIGION

Additional information about a constituent such as ethnicity ore religion is stored in the demographics area of the Personal sub-tab on the Personal Info tab of a constituent's individual record.

Demographics

To review constituent demographics such as ethnicity or religion, navigate to the Personal Info tab, Personal sub-tab of the individual constituent's record.



The information source should always be provided when requesting information be added to a record.

To request demographic information be added to an individual constituent record submit a Bio Feedback Add request from the Comments tab of the individual record.

If a constituent has an affiliation with a religious organization that does not have a record in TED, request the information be added via the Interests sections of the Personal info tab by using the Spirituality | Active in Congregation option. Converted Data

Demographic data from the legacy system converted to the notes area and is being reviewed and adjusted as necessary by UIF Research and will be housed in the Demographics area.

REVIEWED 8/7/24

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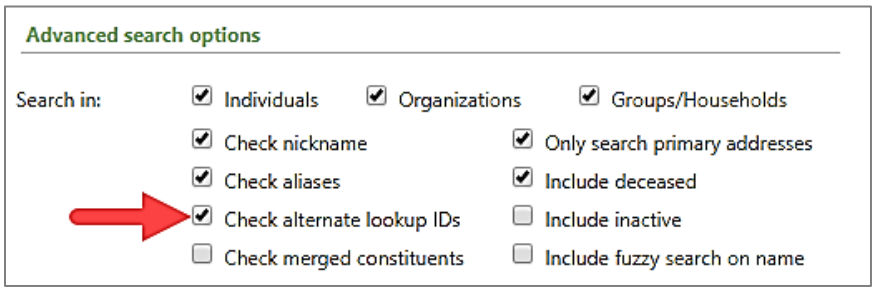
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ALTERNATE LOOKUP IDS

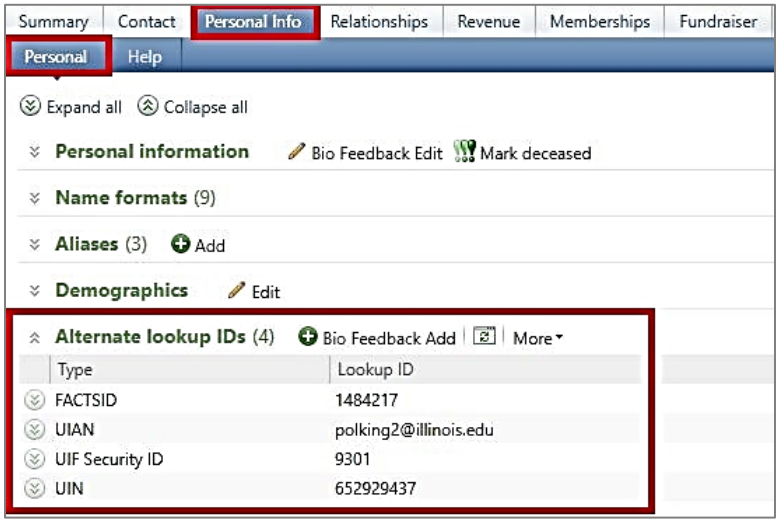
COMPLETE LIST AND DESCRIPTIONS

Every individual, household, organization, and committee/group record in TED has a unique number assigned by the system known as a lookup ID.

Additional ID numbers from other database sources called **Alternate Lookup IDs** can also be housed on these records. Alternate Lookup IDs can then be used to search for records, but only if the "Check alternate lookup IDs" box is checked under Advanced Search Options.

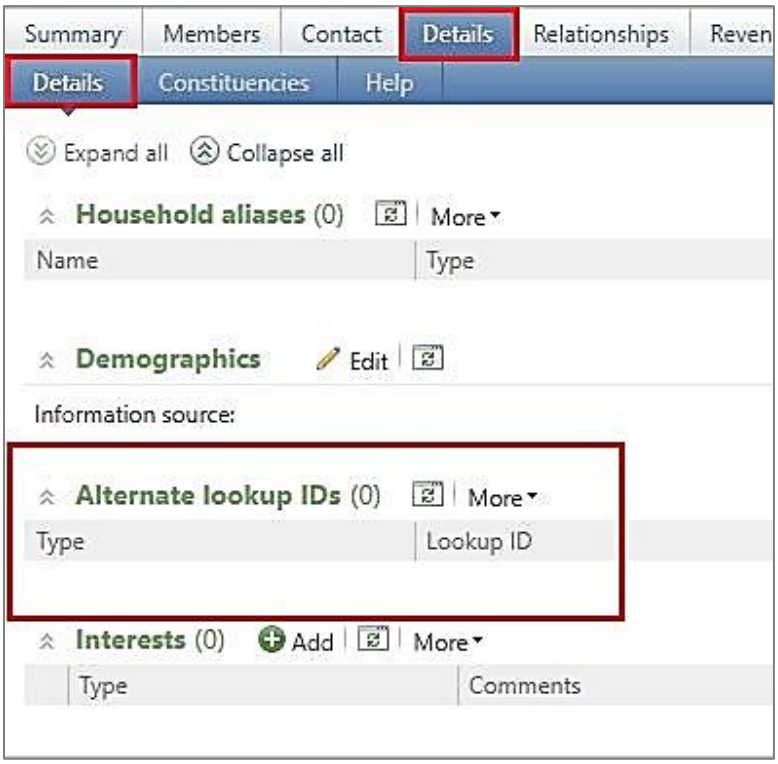


On Individual records, Alternate Lookup IDs are located on the Personal tab, Personal sub-tab.

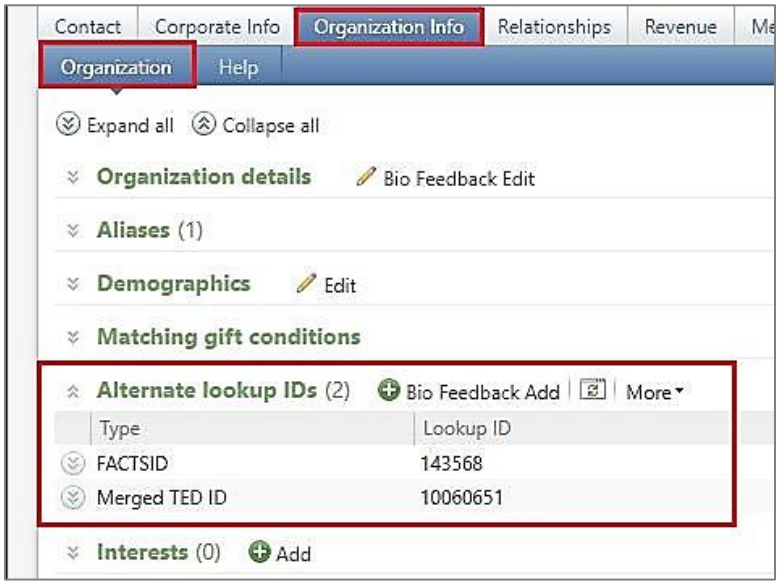


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On Household records, Alternate Lookup IDs are located on the Details tab, Details sub-tab. There are two sections - the Alternate Lookup ID section is for numbers unique to the Household record; the Household Member Alternate Lookup IDs section contains IDs from the records of all household members. This section cannot be added to directly.

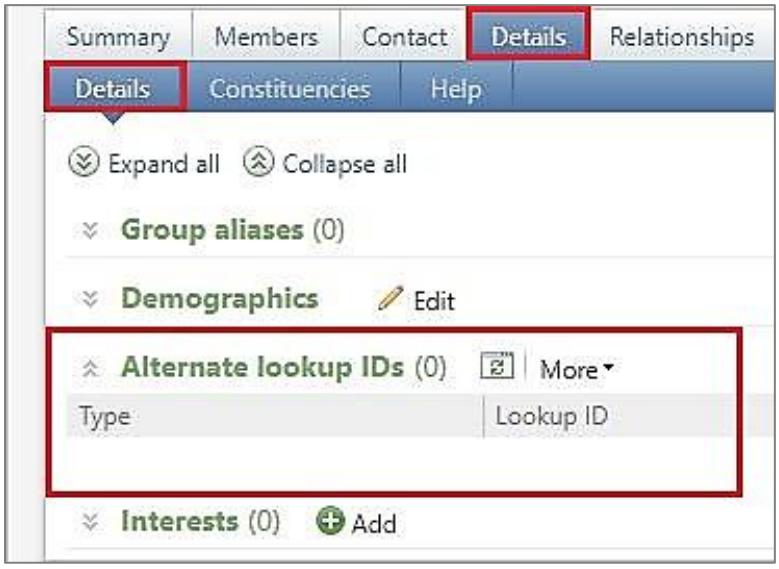


On Organization records, Alternate Lookup IDs are located on the Organization Info tab, Organization sub-tab.



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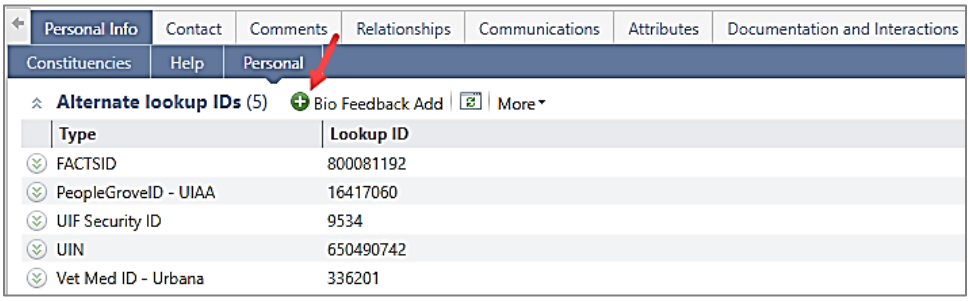
On Committee/Group records, Alternate Lookup IDs are located on the Details tab, Details sub-tab.

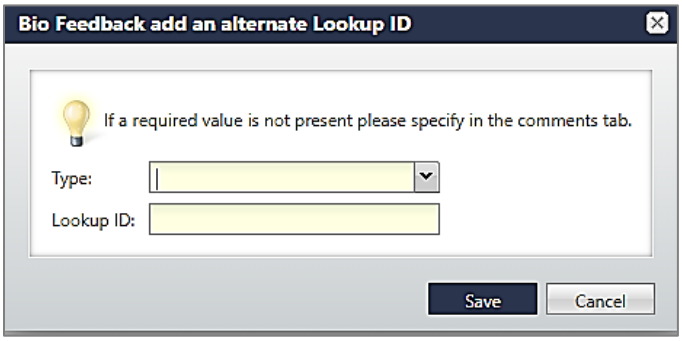


How Alternate Lookup IDs are Populated

Alternate Lookup IDs are populated by processes run by the AIMS Department. Changes or additions can be submitted by doing a Bio Feedback Add.

From the Personal Info tab, Personal sub- tab, click on Bio Feedback Add.





From the drop down select a choice for the Type and fill in the Lookup ID. Once done, click Save.

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As new sources of information are identified, additional Lookup IDs will be added.

List of Alternate Lookup ID Types

Name	Description
Char Master ID	System assigned numbers are useful for IT development only.
EDW	ID number from constituent records in the University Electronic Data Warehouse.
FACTSID	ID Number from the advancement database known as FACTS, active from the early 1990s until retirement Nov. 2015.
FACTSLogon	User Logon to the FACTS advancement system.
Grants and Contracts	ID number assigned to Constituent Records in the University Grants and Contracts System.
LexID	A unique identifier generated by LexisNexis to identify data for a particular individual within their database, which can be used by UIF RPM for future retrieval of data.
Merged TED ID	TED Lookup ID of a deleted record whose data contents were merged into the active TED record. Records with a duplicate in the system are merged.
Paciolan - DIA	ID Number assigned to records in the Pacioloan Database used by Urbana Athletics for ticketing and other purposes.
Paciolan - Krannert	ID Number assigned to records in the Pacioloan Database used by Urbana Krannert Center for the Performing Arts
PeopleGroveID – UIC	ID Number associated with the student or alumni on the PeopleGrove platform from the UIC campus.
PeopleGroveID – UIUC	ID Number associated with the student or alumni on the PeopleGrove platform from the UIUC campus.
PeopleGroveID – UIS	ID Number associated with the student or alumni on the PeopleGrove platform from the UIS campus.
Ticker	ID number assigned to Corporate Stock Ticker.
UIAN	ID Number Assigned to University of Illinois Alumni Magnet System.
UIF Security ID	ID Number assigned to all University staff who have access to any UIF Advancement related systems.

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UIN	University ID Number assigned to all University of Illinois System employees.
Vet Med ID - Chicago	ID Number assigned to Urbana Veterinary Medicine Database (Chicago Based)
Vet Med ID - Urbana	ID Number assigned to Urbana Veterinary Medicine Database (Urbana Based)

REVIEWED 7/11/25

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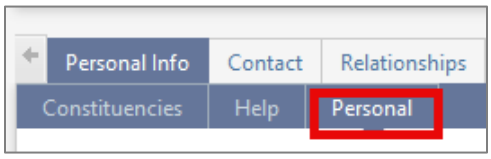
INTERESTS

DETAILS ABOUT OUR CONSTITUENTS

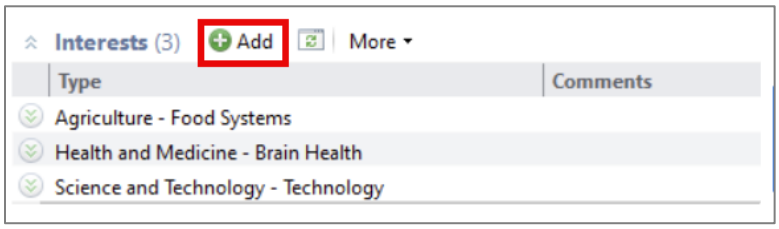
The interests area allows advancement users to identify a prospect's **funding interests**, allowing for more tailored and impactful conversations about philanthropy. Users with the appropriate access can add additional interests using the Add option.

Interests can especially accelerate prospect identification for non-degree granting units, where philanthropic inclination might not surface as an affiliation. **Interests also map to affiliated sites and award ten affiliation points per related site.** Any campus with a designated affiliated site will be allocated the points. On the Individual Detail subtab of the Affiliations tab, these are classified as a subcategory of Personal Interest.

To add an interest, navigate to the Personal subtab on the Personal Info tab on an individual record:



Interests can be added by clicking the green Add button and selecting from the lists of values:



Interests Categories and Definitions

Category	Definition	Subcategories
Agriculture	Science or practice of farming	Farmland, Food Systems, Irrigation, Land Management, Livestock
Arts and Culture	Creative activities or endeavors in performing, visual, literary, arts and design	Architecture, Art Collecting, Heritage, Humanities (Art history, History, Languages, Linguistics, Literature and Writing, Philosophy), Music, Performing Arts, Visual Arts

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Economics, Business, and Industry	Activities related to the production and market exchange of goods and services	Corporate, Economic Development, Entrepreneurship, Industries, Jobs and Employment, Trade
Education	The process of acquiring knowledge and skills through instruction, learning, or training	Adult Education, Child Education, Special Education, Study Abroad and International Students
Environment	The surrounding conditions, factors, or influences that affect living organisms and ecosystems	Animals, Climate, Conservation, Hunting and Fishing, Natural Resources, Renewable Energy, Sustainability, Wildlife
Social Issues, Activism, Public Administration	Movements, organizations, and government programs or policy that address societal challenges	Civil and Human Rights and Liberties, Community, DEI, Family and Youth Programs, LGBTQ, Poverty and Food Insecurity, Social and Human Services
Government	Activities, systems, or people responsible for making and enforcing laws and decisions for a country, state, or community	Disaster Preparedness and Relief, Infrastructure, Law and Crime, Military, Public Safety
Health and Medicine	Science or practice of diagnosing, treating, and preventing diseases, or injuries; and promoting wellness	Aging, Brain Health, Cancer, Public Health, Covid-19 and Pandemics, Dentistry, Disabilities Research and Services, Diseases and Conditions, Genetics, Hospitals and Pharmacies and Providers, Imaging, Mental and Behavioral Health, Neurodiversity, Physical Fitness, Public Health, Veterinary
Information and Communications	Production, organization, and provision of ideas, facts, and knowledge	Data and Analytics, Libraries, Media, Telecommunications
Science and Technology	Study and application of knowledge for practical purposes	Aviation, Life Sciences, Physical Sciences, Technology, Transportation

Ad-Hoc Definitions

Miscellaneous Category	**Definition**
Abraham Lincoln	Sixteenth President of the United States, Illinois lawyer and politician, and resident of Springfield
Athletics	Physical sports and exercises

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Design Thinking	Problem solving approach involving user needs, creative solutions, and iterative testing
Discovery Partners Institute (DPI)	UI System research and innovation hub headquartered in Chicago
Esports	Competitive video gaming
Recreation	Activities done for enjoyment, relaxation, or fun during free time
Makerspaces	Collaborative workspaces where individuals can use tools and resources to create and invent
STEM	Acronym for Science, Technology, Engineering, and Mathematics, referring to educational disciplines and fields that focus on these areas
STEAM	An acronym for Science, Technology, Engineering, Arts, and Mathematics, referring to an interdisciplinary approach to education that incorporates the arts alongside the traditional STEM fields
Storytelling	Art and practice of conveying a narrative in an engaging way

Fundraisers and advancement staff can discuss prospect identification by interest with their assigned PDA.

UPDATED 5/2/25

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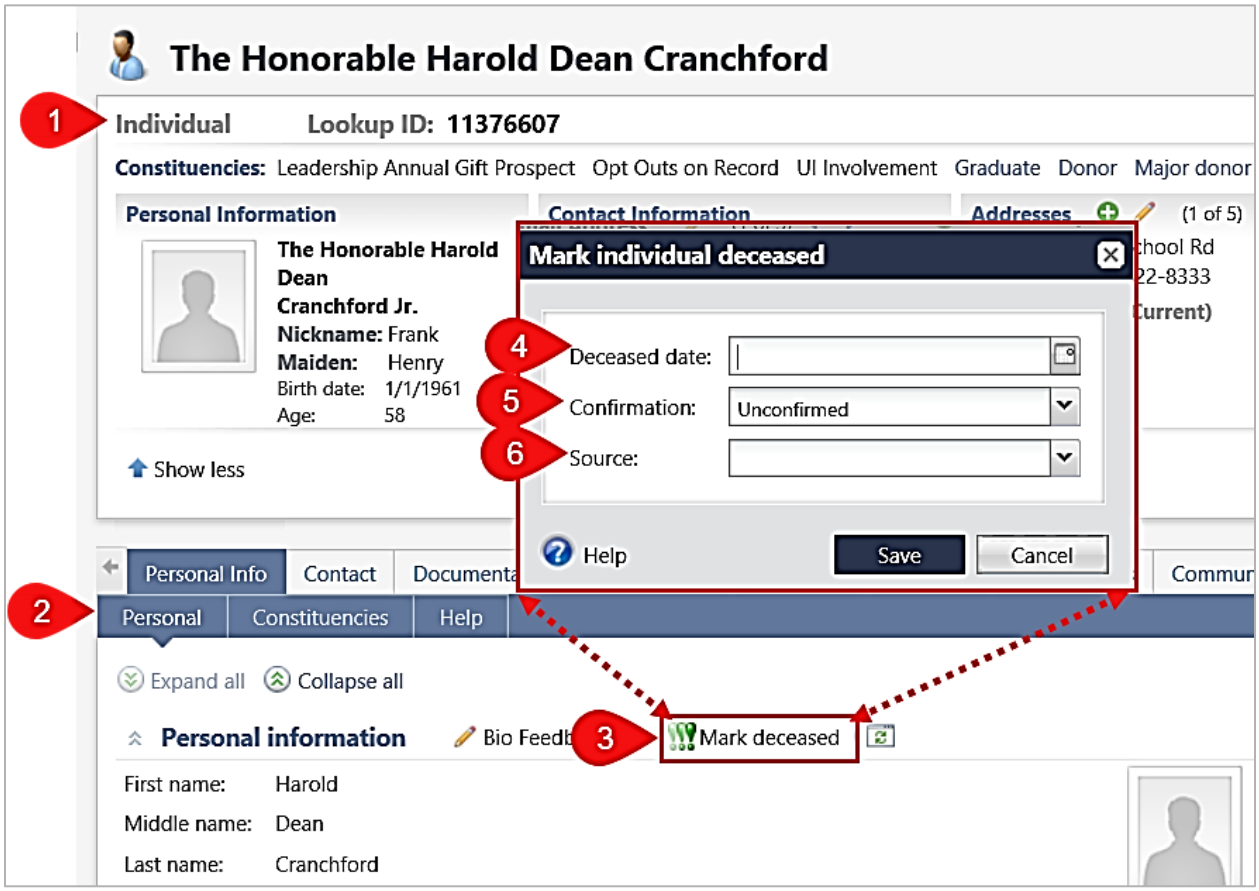
MARKING A CONSTITUENT DECEASED

WHAT TO DO WHEN A CONSTITUENT HAS PASSED

When Advancement employees learn of the passing of a constituent, they can directly mark the records as deceased within the Personal Info tab on the constituent's individual record. Additionally, they may request that the household record of the deceased constituent be updated to reflect this information.

Marking an Individual Record as Deceased

Marking a constituent's record deceased in the TED system allows historical information on the constituent to be preserved.



1. Begin on the constituent's Individual record.
2. Select the **Personal Info** tab.
3. In the Personal Info section click the **Mark Deceased** button to open the Mark Individual Deceased window.
4. In the Mark Individual Deceased window enter the constituent's **Deceased date**.

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5. Mark the **Confirmation** as "**Unconfirmed**". UIF Advancement Information Management and Support (AIMS) will switch this to "Confirmed" once they have complete additional business processes associated with marking a constituent as deceased.
6. Choose an information source in the **Source** field. Refer to the full Information Source documentation for additional details on how best to choose a source if you have multiple sources.
7. Select **Save**.

Deceased Confirmation

It is important to note that when marking a constituent deceased the Confirmation field must always be left as Unconfirmed no matter how, or from who, the information was attained.

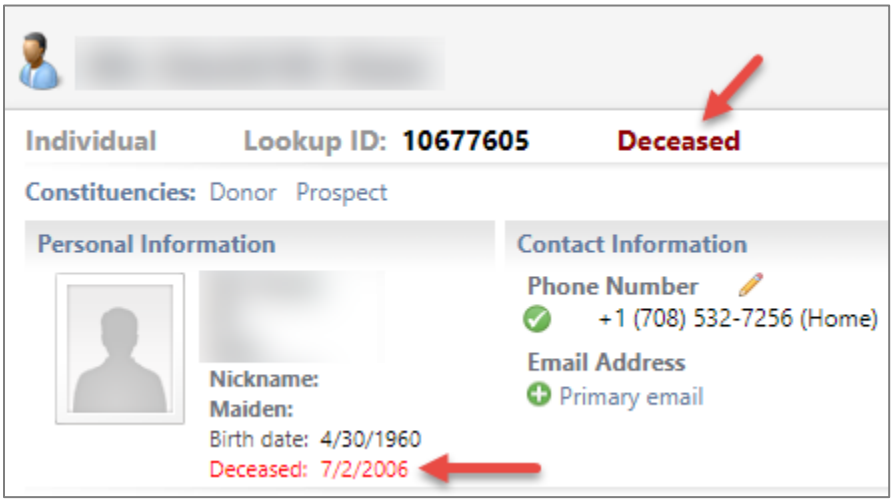
On a regular basis the Advancement Information Management and Support (AIMS) team runs an audit collecting data on any records that have been marked deceased. The AIMS team uses the information found in this audit to verify the constituent's passing as well as to update the constituent's record appropriately.

When updating the constituent's record, the AIMS team will change any appropriate spousal relationships to show that the constituent has been deceased as well as remove any Recognition Credit on the relationship. If Recognition Credit is not correctly removed and a spouse gives a gift the deceased constituent's name will appear on any gift acknowledgement regarding that gift. This can be very upsetting to our constituents.

If the constituent is not left as Unconfirmed it is not pulled in the AIMS audit and the record will not be updated properly.

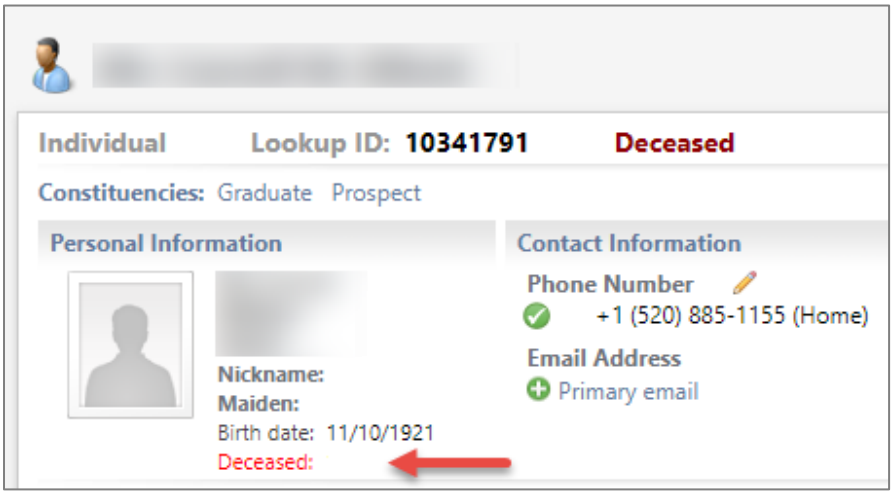
Notable Difference on Deceased Records

The system will add the term **Deceased** to the top of the record next to the constituent's Lookup ID as well as in the Personal Information summary tile. If the date of death is known, it will appear in red lettering to the right of the word Deceased in the tile.

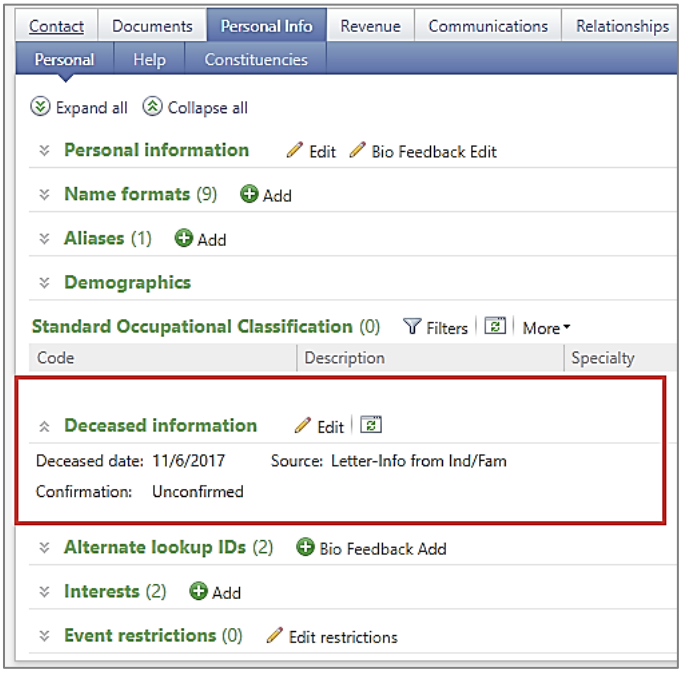


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If the Deceased date is not known, the word Deceased will appear in red lettering with a blank field for the date.



On the Personal info tab, a **Deceased Information** section will appear.

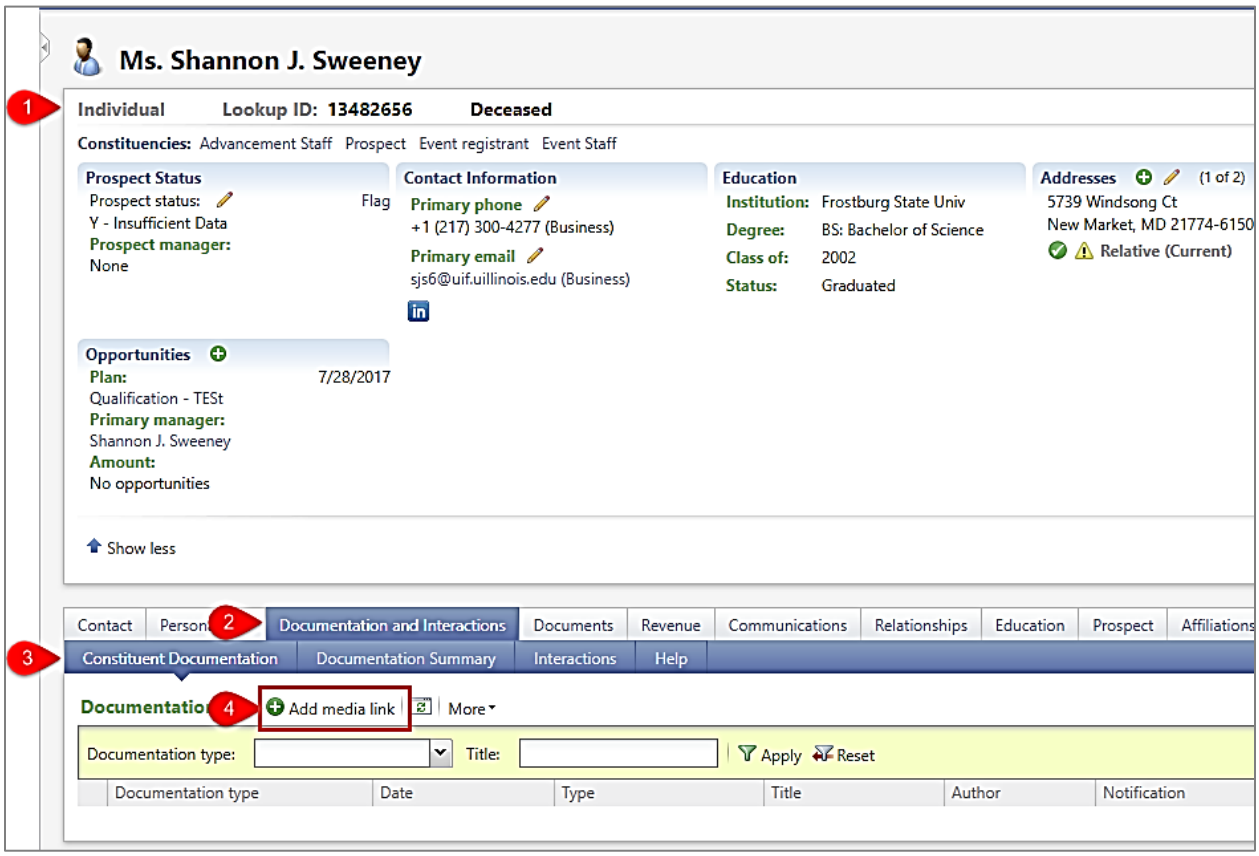


Note: The Deceased date will be left blank if the date of death is not confirmed.

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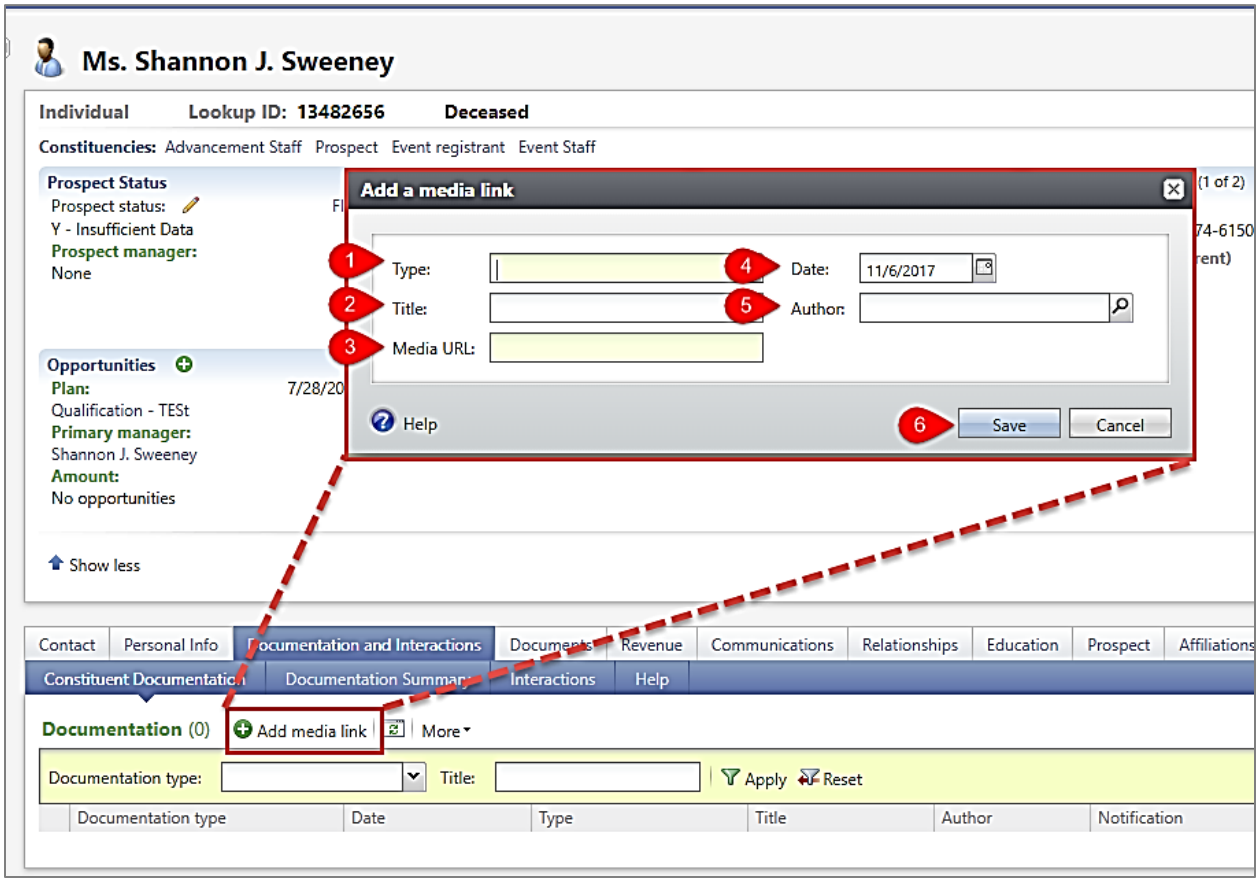
Submitting Additional Documentation

If you have received this information via a web page you may wish to link to the webpage via a Media Link on the constituent's record.



1. Begin on the constituent's Individual record
2. Select the **Documentation & Interactions** tab.
3. Select the **Constituent Documentation** sub-tab.
4. Select the **Media Link** button to open the Add a Media Link window.

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1. Choose an appropriate **type**. Often for obituaries you will choose ‘Obituary’.
2. Give the media link a descriptive name in the **title** field.
3. Paste in the web address in the **Media URL** field.
4. Enter a **date** of the publication for the media link.
5. The name of the **Author** should be the TED user.
6. Select **Save**.

REVIEWED 8/11/24

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TITLES AND DEGREES

PERSONAL INFO TAB SUPPLEMENTAL INFORMATION

Understanding how constituents prefer to be addressed is important when requesting a new record or requesting an update to an existing record. This information is also used in the building of Name Formats in the system. Name Formats are used for marketing and/or communication purposes. They are used in the export definitions for mailing files and even name tags.

This document contains a list of title and degree abbreviations currently available in the system. It was developed using the FairPoint Communications comprehensive list of abbreviations.

Titles

When entered, titles will display before the name on the upper portion of the constituent record. Title fields are used in communication such as email, correspondence, and newsletters. This can include common titles like Ms. or Mrs. or job-specific titles, such as Dr. or government and military titles.

Title and Title 2 use the same table and allow flexibility when more than one title is needed – such as *The Honorable* and *Judge*.

Title or Degree	Abbreviation	In TED	Title
First Lieutenant	1st Lt	1LT	X
Second Lieutenant	2nd Lt	2LT	X
Admiral	Adm	ADM	X
Ambassador	Amb	Ambassador	X
Bishop	Bishop	Bishop or The Bishop	X
Captain	Capt	CAPT	X
Commander	Cdr	CDR	X
Colonel	Col	COL	X
Dean	Dean	Dean	X
Doctor	Dr	Dr.	X
Ensign	ENS	ENS	X
Father	Fr	Father	X
General	Gen	GEN	X
Governor	Gov	Governor	X
Gunnery Sergeant	Gy Sgt	GySgt	X
Judge	Judge	Judge or The Honorable	X
Justice	Just	Justice	X
Lady	Lady	Lady	X

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Title or Degree	Abbreviation	In TED	Title
Lieutenant	Lt	LT	X
Lieutenant Colonel	LTC, Lt Col	LTC	X
Lieutenant Commander	LCdr	LCDR	X
Lieutenant General	LTG	LTG	X
Lieutenant Junior Grade	LtJG	LTJG	X
Major	MAJ	MAJ	X
Major General	MG, Maj Gen	MG	X
Mayor	Mayor	Mayor	X
Miss	Miss	Miss	X
Monsignor	Msgr	Monsignor	X
Miss or Mrs.	Ms	Ms.	X
Mister	Mr	Mr.	X
Mistress	Mrs	Mrs.	X
Pastor	Pastor	Pastor	X
President	Pres	President	X
Professor	Prof	Prof.	X
Rabbi	Rabbi	Rabbi	X
Rear Admiral	RAdm	RADM	X
Representative	Rep	Representative	X
Reverend	Rev	Rev. or The Reverend	X
Reverend Doctor	Rev Dr	The Rev. Dr.	X
Secretary	Sec	Secretary	X
Senator	Sen	Senator	X
Sergeant	Sgt	SGT	X
Sir	Sir	Sir	X
Sister	Sister	Sister	X
Vice Admiral	VAdm	VADM	X

Suffix

When entered, a suffix appears after a name in communication such as email, correspondence, and newsletters. Suffix fields are used in communication such as email, correspondence, and newsletters.

Suffix and Suffix 2 use the same table and allow flexibility when more than one suffix is needed – such as *Jr.* and *MD.*

Title or Degree	Abbreviation	In TED	Suffix
Academy of Certified Social Workers	ACSW	ACSW	X
Accredited Estate Planner	AEP	AEP	

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Title or Degree	Abbreviation	In TED	Suffix
American Institute of Architects	AIA	AIA	X
American Institute of Certified Planners	AICP	AICP	X
American Society of Appraisers	ASA	ASA	X
American Society of Landscape Architects	ASLA	ASLA	X
Certified Athletic Trainer	ATC	ATC	X
Bachelor of Arts	BA	BA	X
Board Certified Diplomat	BCD	BCD	X
Bachelor of Mining Engineering	BME	BME	X
Bachelor of Science	BS	BS	X
Bachelor of Social Work	BSW	BSW	X
Certified Alcohol and Drug Counselor	CADC	CADC	X
Certified Clinical Competency in Audiology	CCC-A	CCC-A	X
Certified Commercial Investment Member	CCIM	CCIM	X
Certified Computer Programmer	CCP	CCP	X
Certified Diabetes Educator	CDE	CDE	X
Certified Estate Counselor	CEC	CEC	X
Chartered Financial Analyst	CFA	CFA	X
Certified Financial Planner	CFP	CFP	X
Certified Flying Instructor	CFI	CFI	X
Certified Group Psychotherapist	CGP	CGP	X
Chartered Financial Consultant	ChFC, CFC	ChFC, CFC	X
Certified Hand Therapist	CHT	CHT	X
Certified Industrial Hygienist	CIH	CIH	X
Certified Insurance Counselor	CIC	CIC	X
Certified Legal Assistant	CLA	CLA	X
Certified Licensed Underwriter	CLU	CLU	X
Certified Management Consultant	CMC	CMC	X
Certified Nurse Midwife	CNM	CNM	X
Certified Nutrition Consultant	CNC	CNC	X
Certified Public Accountant	CPA	CPA	X
Chartered Property Casualty Underwriter	CPCU	CPCU	X
Certified Professional Electrologist	CPE	CPE	X

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Title or Degree	Abbreviation	In TED	Suffix
Certified Property Manager	CPM	CPM	X
Counselor of Real Estate	CRE	CRE	X
Command Sgt. Maj	CSM	CSM	X
Certified School Psychologist	CSP	CSP	X
Certified Social Worker	CSW	CSW	X
Certified Valuation Analysts	CVA	CVA	X
Certified Veterinary Acupuncture	CVA	CVA	X
Doctor of Arts	DA	DA	X
Diplomate American College of Veterinary Ophthalmologists	DACVO	DACVO	X
Diplomate American College of Veterinary Surgeons	DACVS	DACVS	X
Diplomate of Geotechnical Engineering	D. GE	D. GE	X
Doctor of Business Administration	DBA	DBA	X
Doctor of Chiropractic	DC	DC	X
Diplomate in Clinical Social Work	DCSW	DCSW	X
Doctor of Divinity	DD	DD	X
Doctor of Dental Medicine	DDM	DDM	X
Doctor of Dental Surgery	DDS	DDS	X
Doctor of Dental Medicine	DMD, DDM	DMD, DDM	X
Doctor of Osteopathy	DO	DO	X
Doctor of Podiatry	DP	DP	X
Doctor of Podiatric Medicine	DPM	DPM	X
Doctor of Surgical Chiropody	DSC	DSC	X
Doctor of Surgical Work	DSW	DSW	X
Doctor of Veterinary Medicine	DVM, VMD	DVM, VMD	X
Enrolled Agent	EA	EA	X
Doctor of Education	ED D, Ed D, EDD	ED D, Ed D, EDD	X
Master of Education	Ed M, M ED	Ed M, M ED	X
Educational Specialist	ED S	ED S	X
Esquire	ESQ	ESQ	X
Fellow American Academy of Family Physicians	FAAFP	FAAFP	X
Fellow American Academy of Pediatrics	FAAP	FAAP	X
Fellow Associate College of Cardiology *must be preceded by MD	FACC	FACC	X

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Title or Degree	Abbreviation	In TED	Suffix
Fellow American College of Physicians	FACP	FACP	X
Fellow Associate College of Surgeons	FACS	FACS	X
Fellow American Institute of Architects	FAIA	FAIA	X
Fellow Associate College of Chest Surgeons	FCCP	FCCP	X
Fellow Royal College of Surgeons	FRCS	FRCS	X
Fellow Society of Actuaries	FSA	FSA	X
Graduate Realtor Institute	GRI	GRI	X
Honorable	HON	HON	X
Second (Lineage)	II, 2, 2d, 2nd	II, 2, 2d, 2nd	X
Third (Lineage)	III, 3, 3d, 3rd	III, 3, 3d, 3rd	X
Jurist Doctor	J D	J D	X
Junior	Jr	Jr	X
Licensed Clinical Professional Counselor	LCPC	LCPC	X
Licensed Clinical Social Worker	LCSW	LCSW	X
Licensed Dietician	LD	LD	X
Limited Liability Corporation	LLC	LLC	X
Doctor of Law	LLD	LLD	X
Master of Laws	LLM	LLM	X
Licensed Marriage/Family Therapist	LMFT	LMFT	X
Licensed Massage Therapist	LMT	LMT	X
Licensed Practical Nurse	LPN	LPN	X
Licensed Social Worker	LSW	LSW	X
Life Underwriter Training Council Fellow	LUTCF	LUTCF	X
Master of Arts	MA	MA	X
Master of Academy of General Dentistry	MAGD	MAGD	X
Master of Biology	MB	MB	X
Master of Business Administration	MBA	MBA	X
Master of Divinity	M Div	M Div	X
Master of Fine Arts	MFA	MFA	X
Master of Human Services	MHS	MHS	X
Master Landscape Architect	MLA	MLA	X
Master of Music	MM	MM	X

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Title or Degree	Abbreviation	In TED	Suffix
Master of Nursing	MN	MN	X
Master of Psychotherapy	MP	MP	X
Master of Public Administration	MPA	MPA	X
Master of Pedagogy	M Pd	M Pd	X
Master of Public Health	MPH	MPH	X
Master of Physical Therapy	MPT	MPT	X
Master of Science	MS	MS	X
Master of Science Registered Dietician	MSRD	MSRD	X
Master of Science in Dentistry (Orthodontics)	MSD	MSD	X
Master of Science in Education	MSEd	MSEd	X
Master of Science in Financial Services	MSFS	MSFS	X
Master of Science in Nursing	MSN	MSN	X
Master of Social Work	MSW	MSW	X
Master of Taxation	MT	MT	X
National Council of Architectural Registration Boards	NCARB	NCARB	X
Nurse Practitioner	NP	NP	X
Doctor of Optometry	OD	OD	X
Occupational Therapist Registered	OTR	OTR	X
Professional Association	PA	PA	X
Physician Assistant-Certified	PA-C	PA-C	X
Professional Corporation	PC	PC	X
Professional Engineer	PE	PE	X
Professional Land Surveyor	PLS	PLS	X
Physical Therapist	PT	PT	X
Registered Architect	RA	RA	X
Registered Dietician	RD	RD	X
Registered Dental Hygienist	RDH	RDH	X
Registered Diagnostic Medical Sonographer	RDMS	RDMS	X
Registered Landscape Architect	RLA	RLA	X
Registered Nurse	RN	RN	X
Registered Nurse Certified	RNC	RNC	X
Registered Physical Therapist	RPT	RPT	X
Retired (US Military)	Ret	(Ret.)	

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Title or Degree	Abbreviation	In TED	Suffix
Senior	Sr	Sr	X
United States Army	USA	USA	X
United States Air Force	USAF	USAF	X
United States Coast Guard	USCG	USCG	X
United States Marine Corps	USMC	USMC	X
United States Navy	USN	USN	X

Undefined

Some data in the titles and suffixes fields were converted from the legacy database. These abbreviations have not yet been reviewed, defined, or approved as standard values. As the information is reviewed this list will update and title and suffix values may change.

Abbreviation	Abbreviation	Abbreviation	Abbreviation	Abbreviation
2LT	CHMM	DPY	MC LPC	PAS
AA	CIA	DV	MCH	PA-S
ACSW, MSW	CIMA	DVMCVA	MD	PCV
ACVIM	CIP	DVM, MBA	MD MSc	PharmD
AFM	CITP	DVMPA	MD PhD	PhD
AIFA	CM	Ed	MD SC	PhD JD
ALA	CMA	EE	MD, JD	PhD MS
AMS	CMI	EeD	MD, SC	PhD PE
AMusD	CML	EIT	MS, MBA	PH-MPH
ANP	CMTMP	ELD	MD, MHP MD, MHPE	PHR
AP	CNIM	ESD	MD, MPH	PM
APN	CNP	FAAN	MD, MS	PMP
APNCNP	COTA	FAANS	MDMS	PRN
APR	CP	FACEP	MD, MSc	PS
APRN	CPA, CRP	FACHE	MDSC	Psy
ARA	CPCSC	FACVP	ME	PsyD
Arch	CPF	FAHA	MHA	PTOE
ARNP	CPhT	FAND	MHP	RCAF
ARQ	CPIM	FAphA	MHPE	RDLD
ATC/R	CPRP	FASCP	MIM	RF
AuD	CPSS	FASHP	MMS	RhD
AUS	CPT	FIACP	MPHE	RHIA

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Abbreviation	Abbreviation	Abbreviation	Abbreviation	Abbreviation
BCNP	CPWA	FNPAPM	MPVM	RIBA
BCNSP	CQA	FSC	MS, DVM	RKT
BCOP	CQE	FSGM	MS PhD	RN PhD
BCPP	CRCM, CAMS	GISP	MS RDN	RPh
BCPS	CRPC	HhD	MS RN	RPsych
BPharm	CRS	HS	MS, MD	RRA
BS,RPh	CRSP	HSD	MS, PA	RS
BSC	CSA	HT	MS, RN	RSM
BSN	CSC	I	MS, MBA	RVP
BSN RN	CSCP	ICSW-G	MS, RPh	SC
CAE	CSRN	ILANG	MSC	ScD
CBA	CTS	IV	MSC MA	SDB
CCA	CVM	LATG	MSe	SE
CCC SL	CVT	LCHT	MSLS	SFNS
CCLA	DABR	LCWS	MSM	SPHR
CCNPP	DABVP	LDN	MSN,RN	SSND
CCNS	DACVD	LEED	MSOT	SSSF
CCSW	DB	LLB	MSPE	TTEE
CD	DCE	LMP	MSPH	USAFR
CDA	DDS PS	LMSW	MSPT	USANG
CDR	DHA	LPRD	MST	USAR
CEBS	DM	LS	MSV	USMCR
CFBE	DMA	LTC	NCPS	USNR
CFCS	DMH	LTD	NCU	USNR-R
CFE	DMV	MA NCC	NL	V
CFM	DNSc	Mag	NSPE	VI
CFRE	DNSCRN	MAMS	OP	VII
CGRN	DPH	MAWPE	OSB	VMD
CHE	DPhil	MBBS	OSF	BGEN
CHES	DPT	MBCT	OT	GYSG
CHM		MBE		TRUS

UPDATED 8/26/25

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PROSPECT TAB

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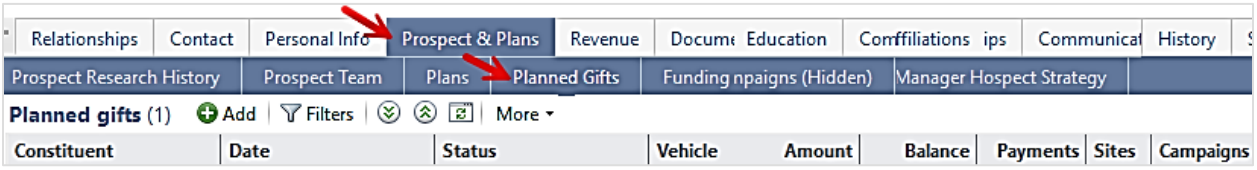
PLANNED GIFTS SUB-TAB

REVIEWING PLANNED GIFT INFORMATION

The Planned Gifts sub-tab displays estate gifts and other gifts the constituent intends to give at a later date (generally after the donor's lifetime). Planned gifts can be revocable or irrevocable depending on the structure of the commitment.

Reading the Planned Gifts Sub-Tab

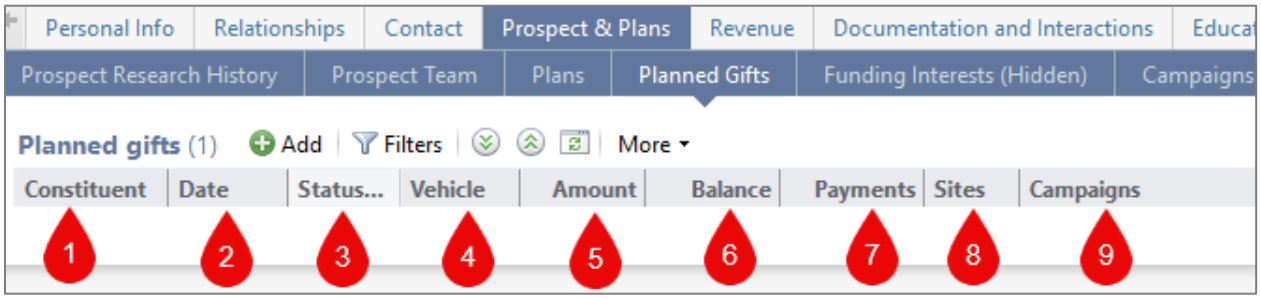
The Planned Gifts Sub-Tab displays the same information on either the household or individual record.



Begin on the **Prospect** tab of the selected record.

Select the **Planned Gifts** sub-tab.

Columns



1. The **Constituent** column displays the household name associated with the planned gift.
2. The **Date** column displays the date the planned gift was recorded by UIF.
3. The **Status** column displays where in the planned gift lifecycle the gift currently is. Utilized options are:
    a. **Accepted** – When the constituent has accepted the planned gift proposal.
    b. **Withdrawn** – When the donor decides not to proceed with a previously recorded commitment.
    c. **Matured** – When the gift has been fully realized by UIF.
    Note: Proposal, Response Pending and Rejected are no longer being utilized.
4. The **Vehicle** column displays the instrument or asset the donation is expected to be paid from.
5. The **Amount** column displays the total estimated amount that the constituent has agreed to donate.
6. The **Balance** column displays the total amount that constituent has committed towards the donation, less any payments received.

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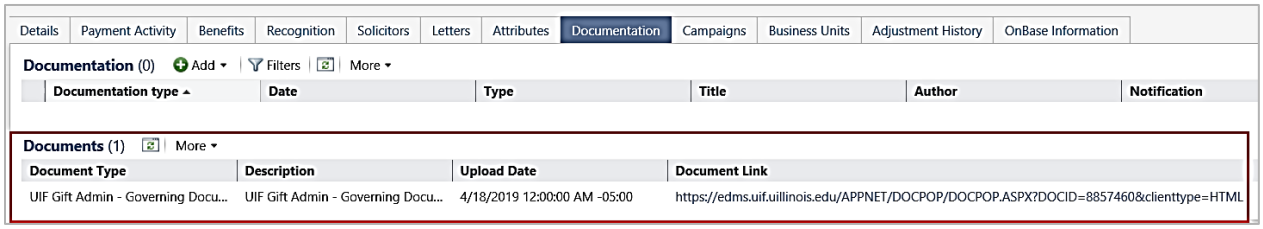
7. The **Payments** column displays any payments that have been received towards the donation.
8. The **Sites** column displays the site to which the planned gift is associated.
9. The **Campaigns** column displays the campaign to which the planned gift is associated.

Planned Gift Documentation

From the Planned Gifts sub tab, clicking on the link under Vehicle will take you into the Planned Gift Details tab.



Under the Documentation tab, the Documents section will display a link if there is a fund agreement associated with the Planned Gift.



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PLANS SUB-TAB

FINDING THE PLANS FOR A CONSTITUENT

The Plans sub-tab displays the prospect plans and stewardship plans associated with the constituent.

The Plans Sub-Tab

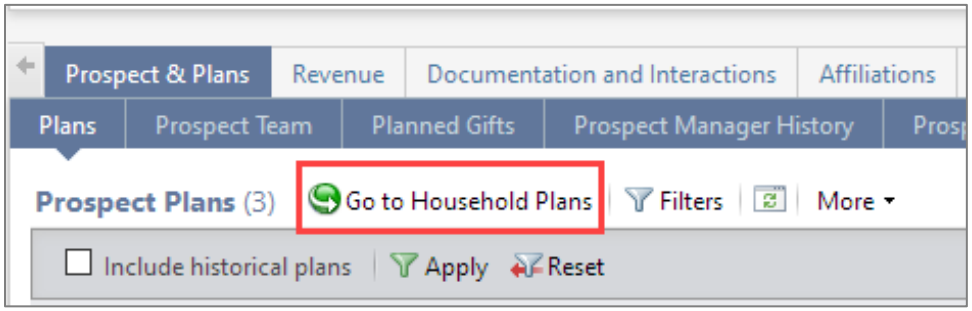
The Plans sub-tab displays all active and former plans associated with a constituent and can be viewed from an individual or household record.

From the Prospect & Plans tab on an individual or household record, select the Plans sub-tab.

On the Individual Record

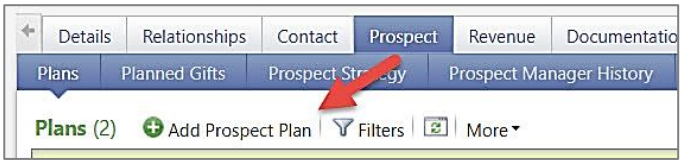
Plans are added to household records, but plan information will still be displayed on the individual record if the individual constituent has been selected as a plan participant on the plan. Reviewing the Plans sub-tab on an individual record can assist in the assessment of a constituent.

To add or edit a prospect plan when viewing a constituent's individual record, click the **Go to Household Plans** button. This will open the Plans sub-tab under the Prospect & Plans tab of the household record.



On the Household Record

When viewing a constituent's household record, existing plans can be viewed, and new plans can be added using the **Add Prospect Plan** button.

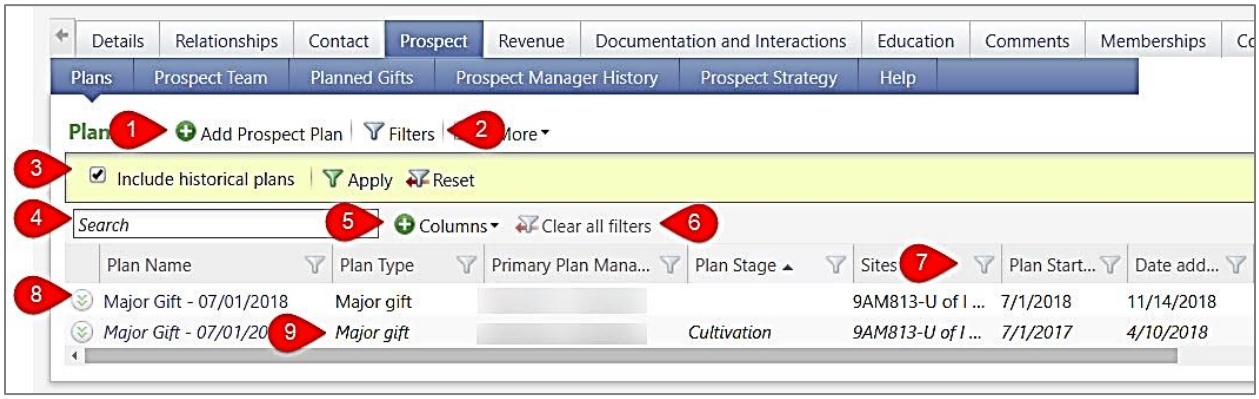


Reading the Plans Sub-Tab

The Plans sub-tab displays all prospect plans and stewardship plans associated with a constituent's record. By policy, all plans should be added on the household record. The Plans sub-tab displays both active and historical plans depending on the selected filters.

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1. The **Add Prospect Plan** option allows the user to add a new prospect plan to the household record.
2. The **Filters** option expands the screen to show filter options available. Filters alter what is displayed below.
3. Once the **Filters** option has been selected and expanded, there are several **filter options** available.
    a. The **Include historical plans** option will display any plans that were previously made historical. When the **Include historical plans** box is checked, historical plans will be displayed in *italics*.
    b. Select **Apply** to apply the selected filter.
    c. Selecting **Reset** will remove any applied filter.
4. **Search**: The Search bar searches all displayed fields for the information entered.
5. **Columns**: The Columns option allows the user to select what columns display in the field below. Gift officers should select the columns that they find most useful for their work. The following columns are recommended: Prospect, Date Added, Plan Start Date, Plan Name, Plan Type, Sites, Plan Stage, Primary Manager, Opportunity Type, and ISACTIVE.
6. **Clear all filters:** Selecting this option will remove any filters that have been added via the search bar, the Filters option, or in the column headers. Until filters are cleared, column settings and filters will remain in effect across TED records viewed.
7. **Column Filters:** Use the filters at the top of each column to limit what is displayed by column-specific criteria. Multiple column filters can be used at a single time to narrow down or limit what is displayed. Column filters will remain in effect across TED records viewed, until they are adjusted or cleared.
8. **Hyperlinks:** Items in the Plan Name column are displayed as hyperlinks. Click the hyperlinks to navigate to the plan.
9. Plans that are displayed in italics are **historical plans**.

Similar filters are available for Stewardship plans, which are listed below Prospect Plans.

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STEWARDSHIP PLANS

HIGH LEVEL OVERVIEW OF THE STEWARDSHIP PLAN PROCESS

A stewardship plan is a series of steps that plan stewards complete as part of the stewarding process. Each plan details how often plan stewards should contact the constituent, the contact method, and the objective.

The Stewardship Plan view tracks your organization's stewardship activity related to the constituent and provides information to help the plan's stewards make interactions personal and meaningful.

Stewardship Plans have several purposes:

1) To steward donors after they have made a gift by providing them with continued communication illustrating the impact of their gift as intended.
2) To steward the gift fund itself by completing those tasks necessary to spend the gift as the donor intended.

Identifying and Documenting the Stewardship Strategy

Stewardship is a means to cultivate relationships with constituents who currently contribute to this organization or may contribute in the future. It is a means to also provide accountability for the agreement made by this organization to utilize the gift as intended while also providing appropriate stewardship to the donor in relation to their wishes. Stewardship plans are identified by the type and amount of gift commitment.

Why to Add a Stewardship Plan

- Stewardship plans are needed to create and track stewardship strategies for donors in TED.
- Plans allow multiple people in Advancement to own the steps within, making it clear who owns each piece of the stewardship strategy.
- Plans give us the ability to keep historical records on who the donor has interacted with, as well as look forward at who they will be engaging with in planned future steps.

When to Add a Stewardship Plan

- A stewardship plan should be added once a gift (major gift, principal gift, deferred gift) has been booked.

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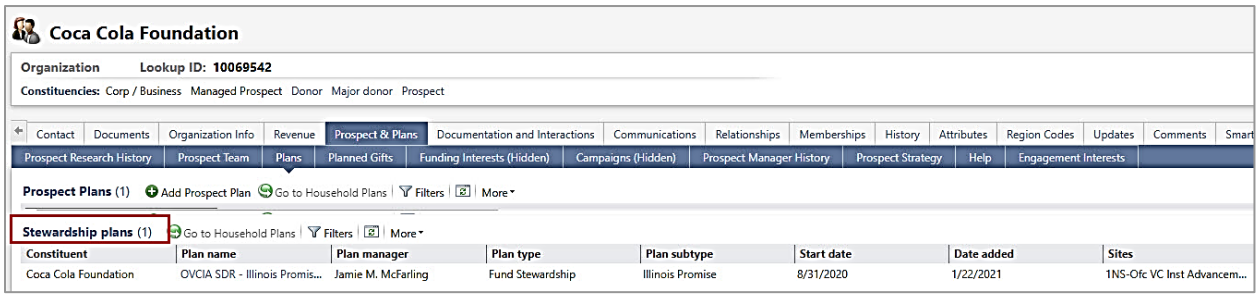
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- A stewardship plan should be added once it is decided a donor will be moving into ultimate stewardship.

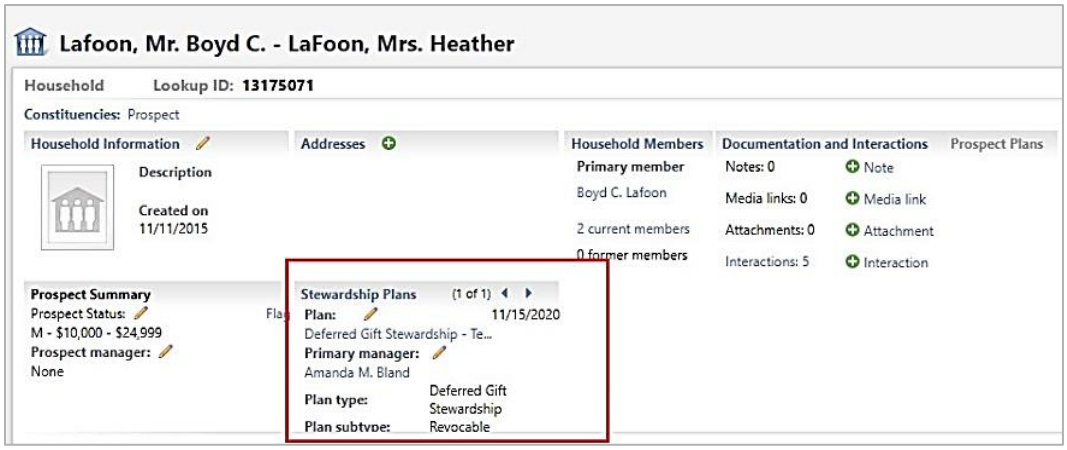
- All steps should be marked as “pending” when they are added.

  Note: Units can define their strategy to use a plan for stewarding gifts that do not have a gift/pledge or fund agreement attached that is less than an endowment level.

For constituents who have a stewardship plan, click the **Plans** subtab**,** under **Prospect & Plans** on the constituent record to access the Stewardship Plans. You can go to an individual stewardship plan to view more details about the plan, including plan steps.



Active Stewardship Plans can also be accessed through the Stewardship Plans tile

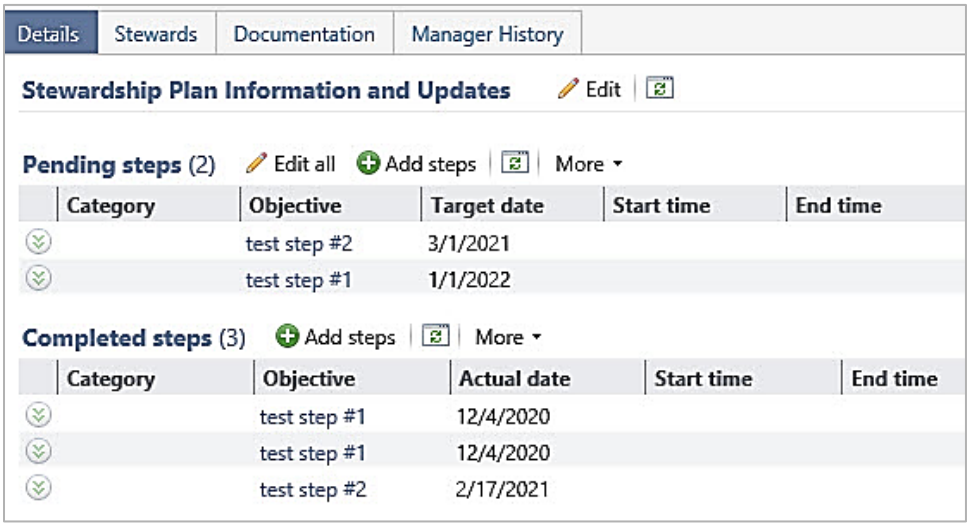


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Viewing the Tabs on a Stewardship Plan

Within the plan, there are 4 tabs: **Details**, **Steward**, **Documentation** and **Manger History**.

1. The **Details** tab displays the plan's information and updates, and the Pending and Completed plan steps. Here you can view and manage the steps associated with the stewardship plan. *Note*: For organizations, you can select to view steps added to a subsidiary's stewardship plan from the **Details** tab of the parent corporation's stewardship plan. This allows you to view stewardship activity for all areas of the company from the parent corporation's plan.
2. The **Stewards** tab contains the name/s of the Current Steward/s, Role, and the Start and End dates. You can view the list of all fundraisers associated with the plan and their stewardship roles, if defined.
3. The **Documentation** tab displays information about the note/s, including Date, Type, Title, Author, and Step. You can view and add notes to track helpful or interesting pieces of information related to the plan or individual step.
4. The **Manager History** tab displays the Manager, and the Start and End date. You can view the list of historical managers associated with the plan.

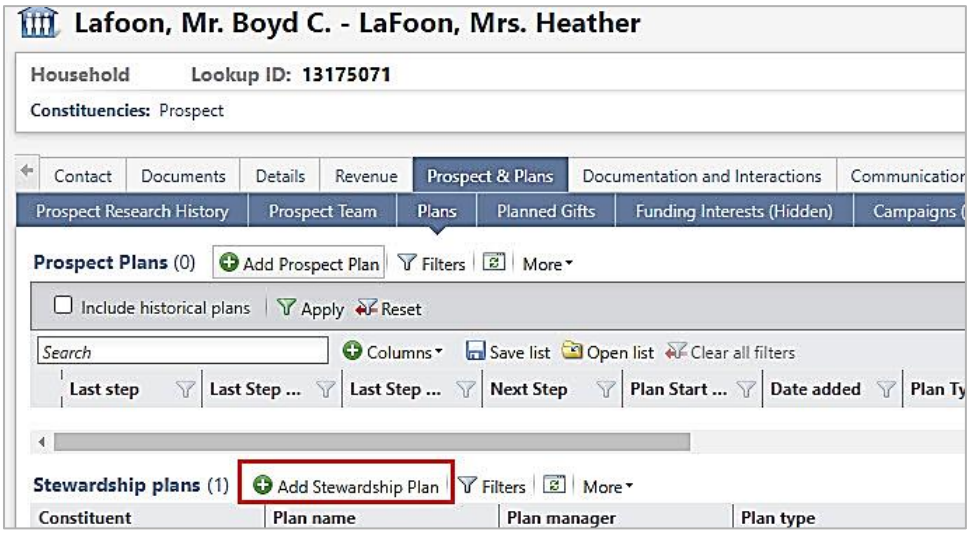


Adding Stewardship Plans

From the **Prospects & Plans** tab, you can create a stewardship plan for any constituent.

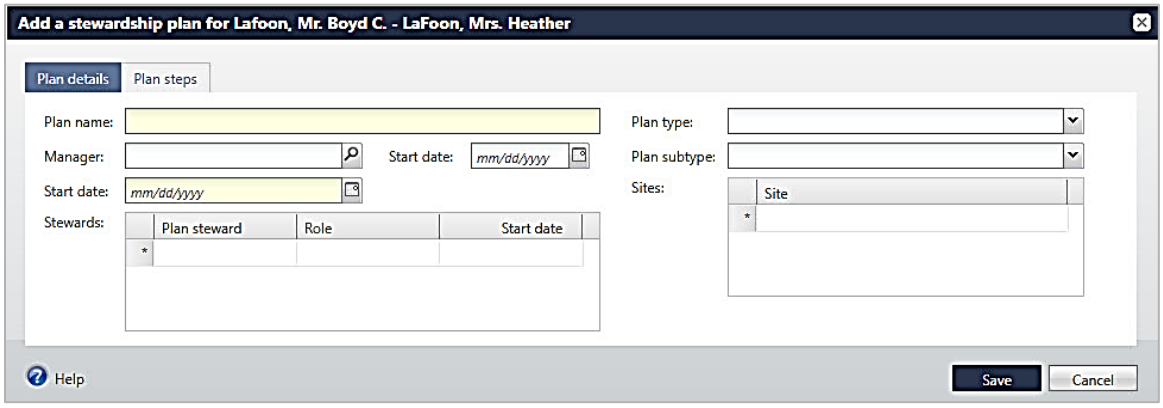
On the navigation bar of the household record, select **Add Stewardship Plan** from the Prospect & Plans tab, Plans subtab.

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Note: This step must be done from the Household record.

Fill in the fields on the **Plan details** tab. The definitions for these fields can be found in the Plan Details Definitions section below.



Plan Details Definitions

Screen Item	Description
Plan Name	The name of the plan
Manager	The constituent who coordinates the efforts of the plan's stewards. There is a Start date field next to the Manager. This is the manager's start date, not to be confused with the Start date for the stewardship plan.

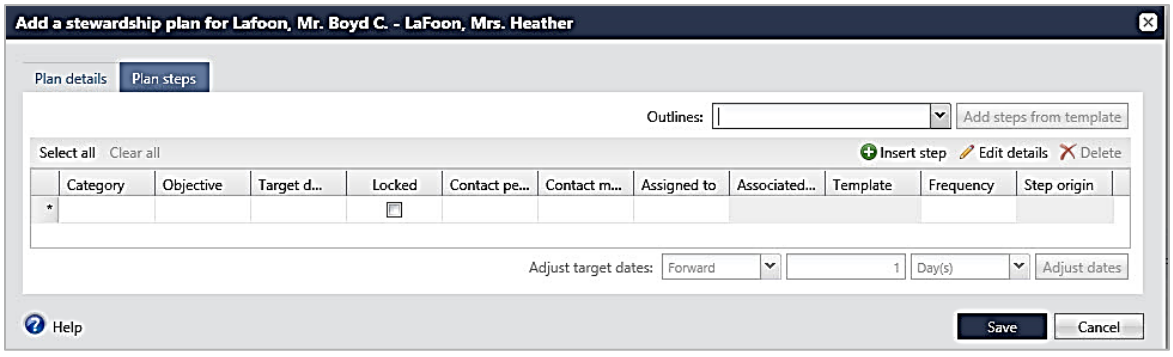
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Plan type	The plan type further defines the stewardship plan. See Plan types defined below.
Plan subtype	The plan subtype further defines the stewardship plan. These have been customized for the OVCIA stewardship office and are not currently used by most unit stewardship officers. Units can request subtypes be added if they find it necessary in the future.
Start date	The date the stewardship plan started. The other Start date field on this screen is for the manager.
Stewards	Constituents associated with the plan. In the Role column, select the steward's role for this plan. If you have numerous steps, you may need to assign multiple stewards to the plan.
Sites	The site or sites the stewardship plan is associated with. Multiple sites within your organization may collaborate when deciding how to steward an important donor.

Plan Types

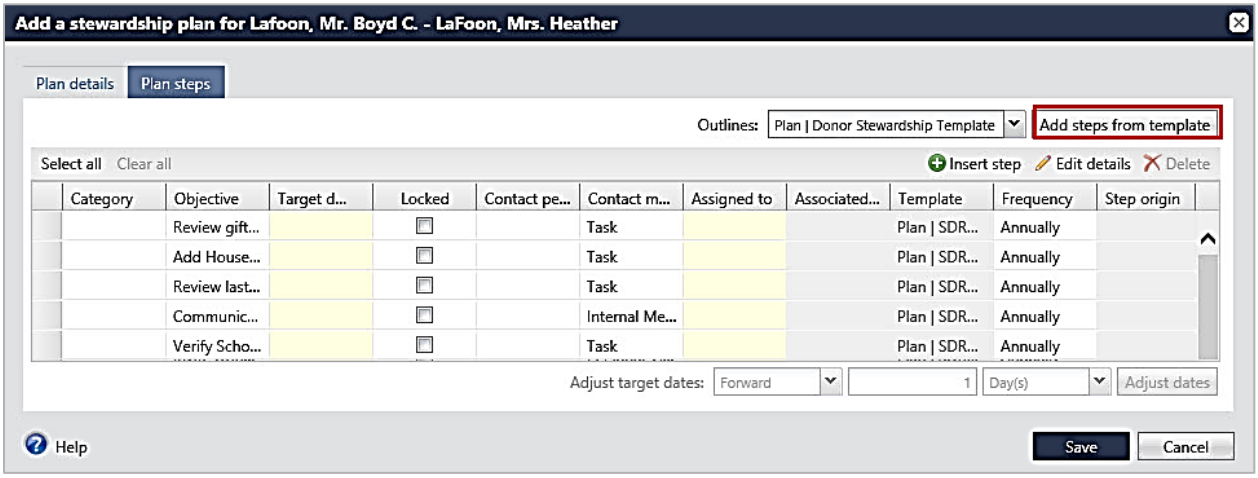
- Compound – for donors with multiple types of funds
- Deferred Gift – for donors with deferred gifts booked
- Fund – for donors who have given at the major gift level
- Principal Gift – for donors who have given at the principal gift level
- Ultimate – for donors who have indicated they will not be making further major gifts

Fill in the fields on the **Plan steps** tab. The definitions for these fields can be found in the Plan Steps Definitions section below.



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Clicking on the **Add steps** from template button provides prefilled steps that you can add information to such as Contact person, Contact method and Assigned to fields.



Click **Save** once all information has been added.

Plan Steps Definitions

Screen Item	Description
Add steps from template	A group of steps predefined that are generally used for a specific type of stewardship plan. After selecting the appropriate template, the template steps appear in the grid.
Category	This field is currently not being used.
Objective	The purpose for the step.
Target date	The date the step should occur.
Locked	When steps are locked, the date fields for the step are disabled. When you move the dates forward or backward in the **Adjust target dates** fields, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step.
Contact method	Enter the contact method for reaching the constituent.

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Assigned to	Select a steward to perform the step. If you enter a constituent who is not a steward, the program adds the individual to the stewardship plan's **Stewards** tab.
Associated plans	Displays the name of the prospect plan associated with the step or the number of plans if you linked the step to more than one.
Template	The name of the template is associated with the step. When you add steps from a stewardship plan template, the name of the template automatically appears in this column.
Frequency	How often the step occurs.
Step origin	Displays the name of the constituent that the step was originally added for in this plan. For example, if you select to view plan steps for subsidiary organizations on a parent organization's stewardship plan, you can easily determine the steps associated with each organization from the **Step origin** column.
Adjust target dates	The ability to adjust the target dates "Forward" or "Backward." Enter the interval of time in days, weeks, or months. You cannot adjust locked dates.
Edit details	This opens the Edit stewardship plan screen where you can add details for the step, such as associating prospect plans with steps. Highlight the step you want to edit the details for, then click the **Edit details** button. Clicking the button without highlighting a step first, adds a new step.
Insert step	**Insert Step** adds a step to the grid. If you select a current row in the grid and click **Insert Step**, a row appears above the row you select.
Delete	Select a row in the grid and click **Delete** to remove the step.

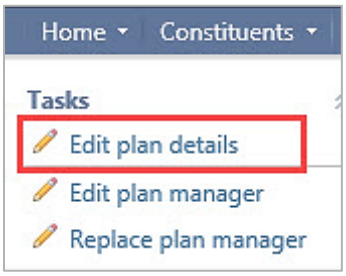
Editing Plan Details, and Plan Managers

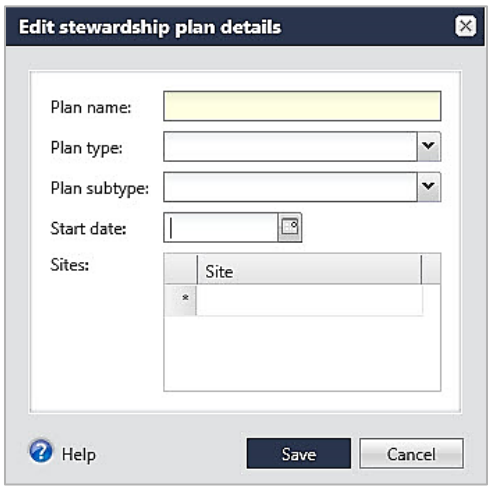
Stewardship plan details and Managers can be edited from within the plan under Tasks.

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To update stewardship plan details such as plan name, type, date, and site, click **Edit plan details** under **Tasks**.

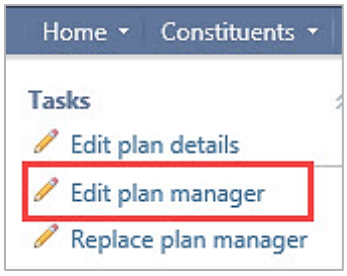




a) Fill in the **Plan name**.
b) Choose a plan type from a drop-down list.
c) Choose a plan subtype from a drop-down list.
d) Fill in the start date.
e) Choose a site from a drop-down list.

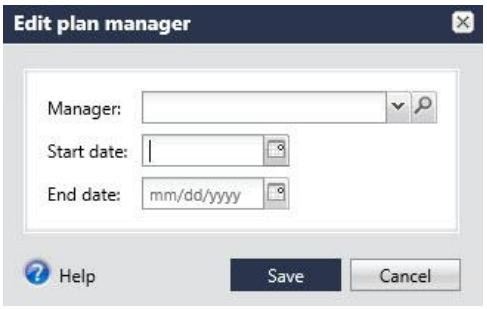
To edit the plan manager, click Edit **plan manager** under **Tasks**. You can select a constituent currently associated with the plan or search for a new manager.

**Note*: This option will not keep the manager history. Only choose this option if the wrong manager was assigned.



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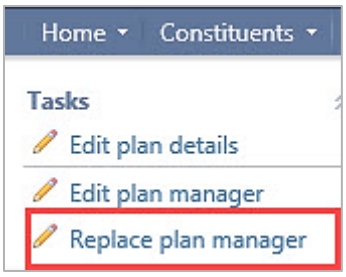
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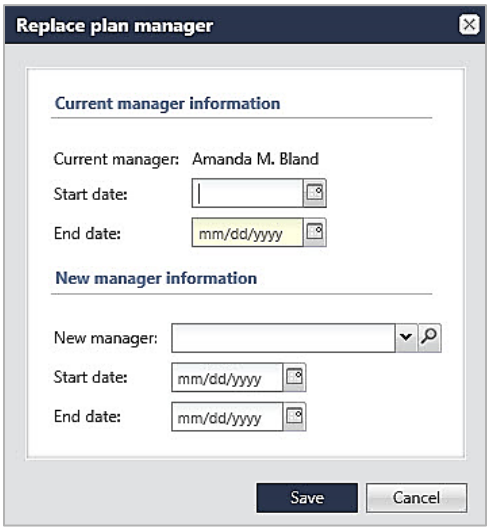


a) Select from the drop down, or enter a new name in the **Manager** field.
b) Select the start date
c) Select the end date
d) Click **Save.**

If a new manager is taking over the plan, you can replace the current plan manager. You can select a constituent currently associated with the plan or search for a new manager.

Click **Replace plan manager** under **Tasks**.





a) Enter the start date for the current manager.
b) Enter the end date for the current manager.
c) Enter a name in **New manager** or select a constituent currently associated with the plan.
d) Enter start date for the new manager.
e) Enter the end date for the new manager.
f) Click **Save**.

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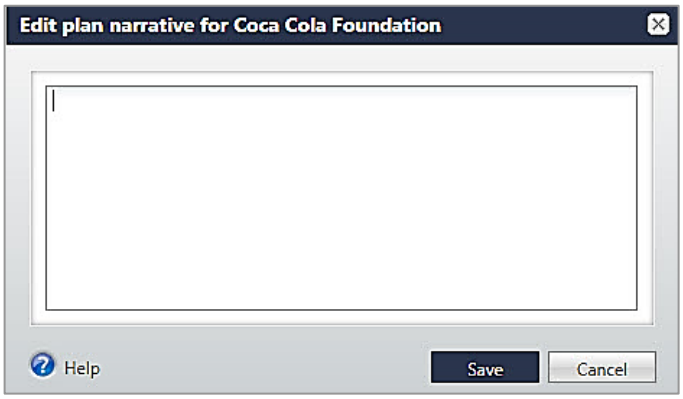
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Editing the Stewardship Plan

In the **Stewardship Plan Information and Updates** frame of the plan's **Details** tab, you can edit and enter the plan's purpose or other information. Click **Edit** and the Edit plan narrative screen appears.

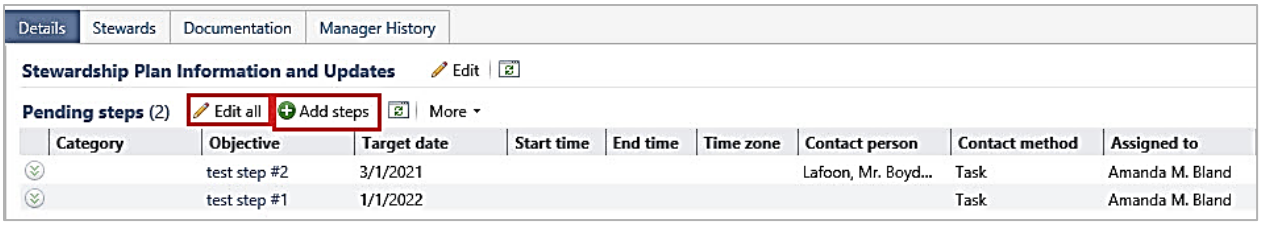


The text box allows for any information you wish to add. Click **Save**.

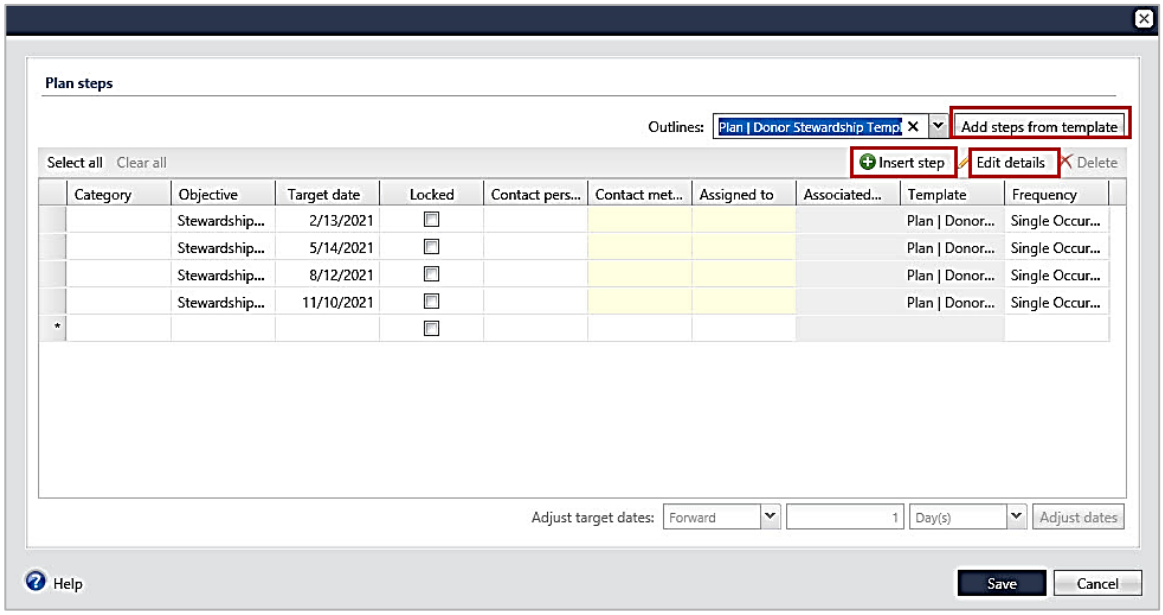


Add, Edit, or Delete Pending Steps

To update all steps within the stewardship plan, click **Edit all** in the **Pending steps** grid on the **Details** tab of the Stewardship Plan page. To add more steps, click **Add steps**.



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Either of these buttons take you to the screen below. The only difference is the **Edit all** option will show existing steps that you can edit, and it will allow you to add additional steps. The **Add steps** option only allows you to add new steps.

Clicking on the **Add steps from template** button provides prefilled steps that you can add information to such as Contact person, Contact method and Assigned to fields.

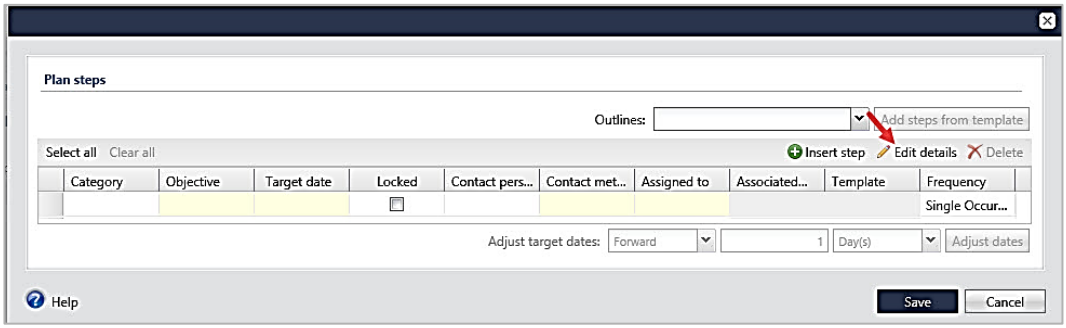
Clicking on **Insert step** will insert a row/s for adding all information required for a new step to be added.

Clicking on the **Edit Details** button will allow for editing additional step details. Highlight the step you want to add details for and then click the **Edit details** button. Clicking the button first will result in a new step being added after you fill in the fields within the Edit details screen.

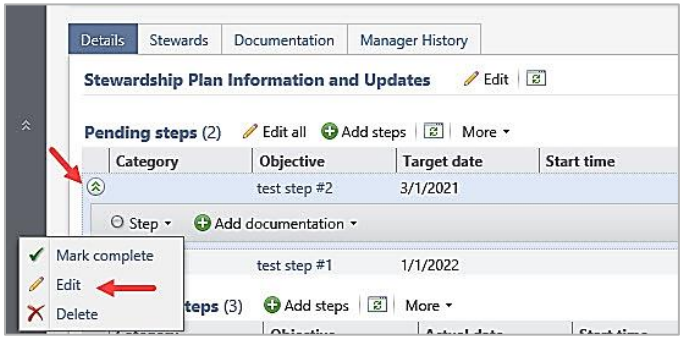
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You can edit the plan step details using the **Edit details** button within the **Edit all** or **Add steps** options.

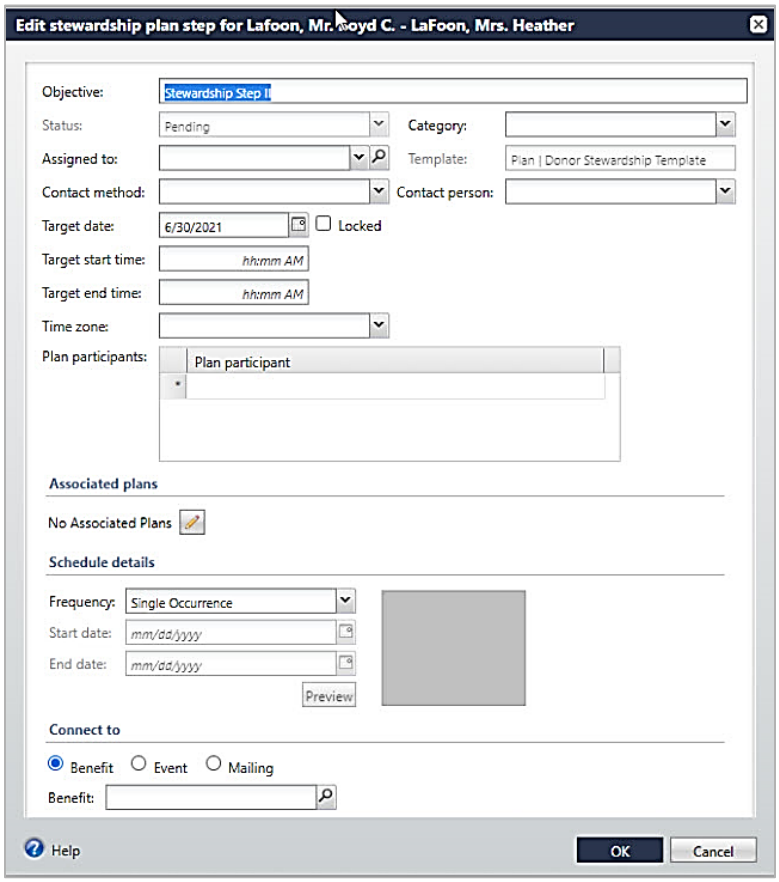


You can also edit the plan step details from the Details tab of the Stewardship Plan page under Pending steps by clicking the green arrows next to the step and click **Edit**.



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The following window appears. Enter the necessary information and click **Ok.**



Note: Please see definitions for these fields in the Edit Stewardship

Plan Step Screen Definitions section below**.**

Edit Stewardship Plan Step Screen Definitions

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Screen Item	Description
Objective	The purpose for the step.
Status	The status of the step. The options are Pending, Completed, Canceled, and Declined. If you select "Completed," when you click **Save** the step moves to **Completed steps**.
Assigned to	The steward responsible for the plan step. When you assign a step to a constituent other than a current plan steward, the program adds the individual as a steward on the stewardship plan's **Stewards** tab.
Target date	The date the step should occur.
Target start time	The target start time for the step.
Target end time	The target end time for the step.
Time zone	The time zone associated with the step.
Plan participants	Constituent participants associated with the step. Click in the field and then click the magnifying glass to access the Constituent Search screen.
Locked	Select to disable date fields for the step. When you move the dates forward or backward in the **Adjust target dates** fields, locked dates do not change. Use this option for steps associated with a fixed date, such as an event. Clear the checkbox to unlock the date.
Category	This field is currently not being used.
Template	When you add plan steps from a template, the template name appears in this field.
Contact method	The contact method for reaching the constituent.
Contact person	For a group, household, or organization's stewardship plan, select the constituent you will contact for this step.
Associated plans	For major giving prospects, click the pencil to link the step to any of the constituent's prospect plans that resulted in an accepted opportunity. Check the box in the Selected column for each plan you want to associate with the step. When you click **OK**, the step appears on the **Stewardship Steps** tab of the selected prospect plans. Linked steps inherit security settings from the prospect plan, so users who do not have permission to view the prospect plan cannot view stewardship steps linked to the plan.

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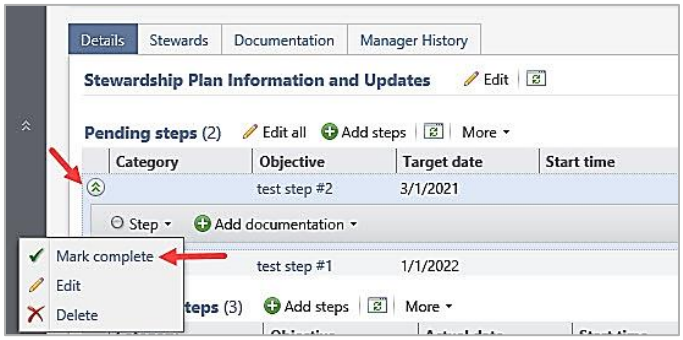
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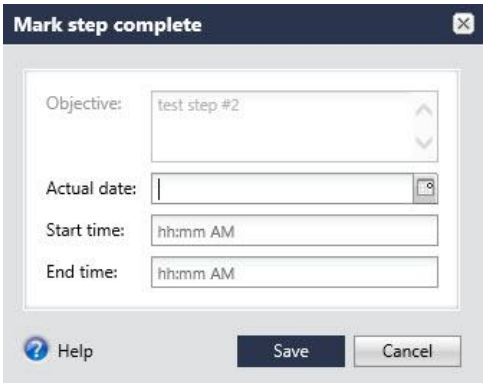
Schedule details	Select how often the step occurs in **Frequency**. You can then enter the start and end dates for the step. Click **Preview** to view the dates for the step based on the frequency you selected.

Other ways to edit steps are to mark them as being complete or deleting the step.

From the **Pending steps** grid on the **Details** tab of the Stewardship Plan page, you can mark a step complete.

Select a step using the green arrows and click **Mark Complete**.



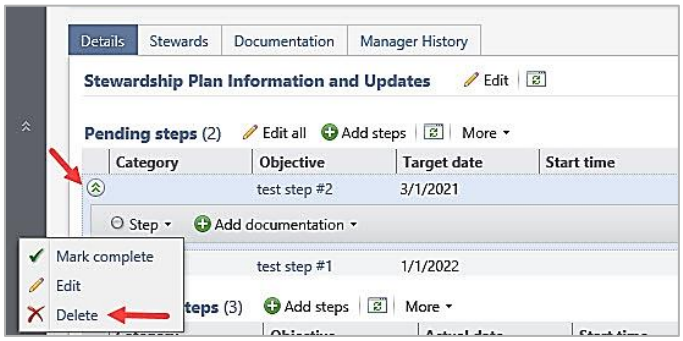


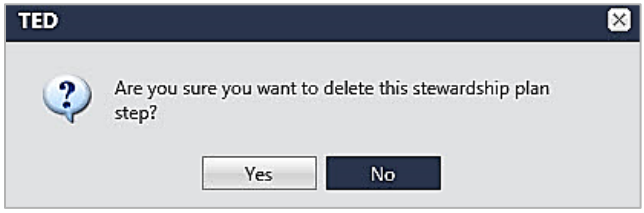
a) Enter the Objective (purpose of the step)
b) Enter the Actual date if known
c) Enter the Start time
d) Enter the End time
e) Click **Save**.

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From the **Pending steps** grid on the **Details** tab of the Stewardship Plan page, you can delete plan steps.

Select the step to delete using the green arrows and click **Delete**.





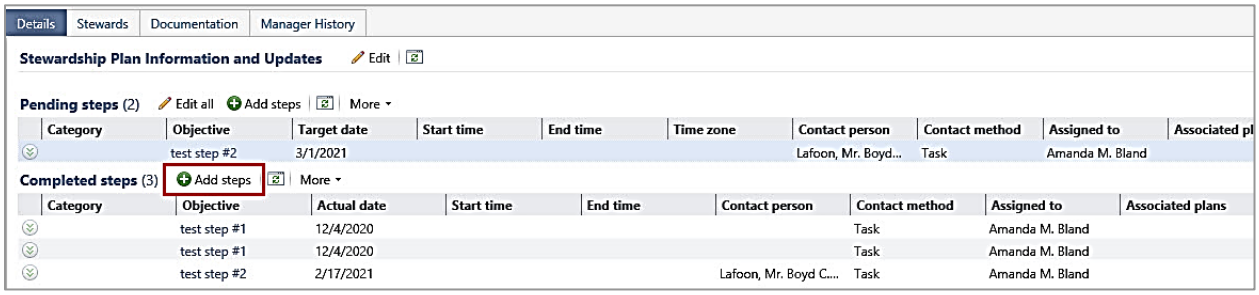
A confirmation screen appears giving you the option to choose **Yes** or **No**.

Add, Edit, or Delete Completed Steps

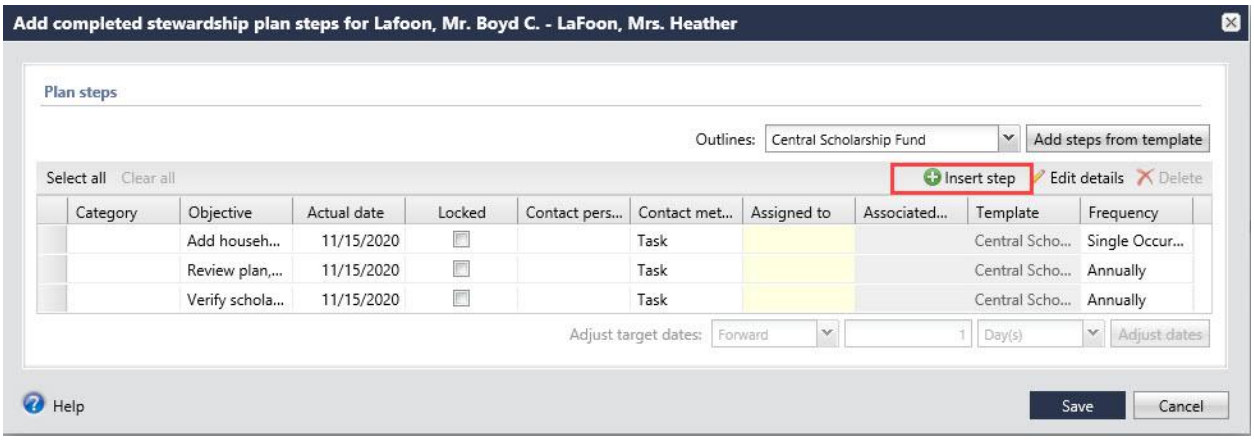
From **Completed steps** on the **Details** tab, you can view plan steps that have been completed. You can also add steps the plan's stewards performed that were not previously included in Pending steps, manage these steps, or add notes, links, or files related to a step.

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To add a step, click on the **Add steps** button in the **Completed steps** section.



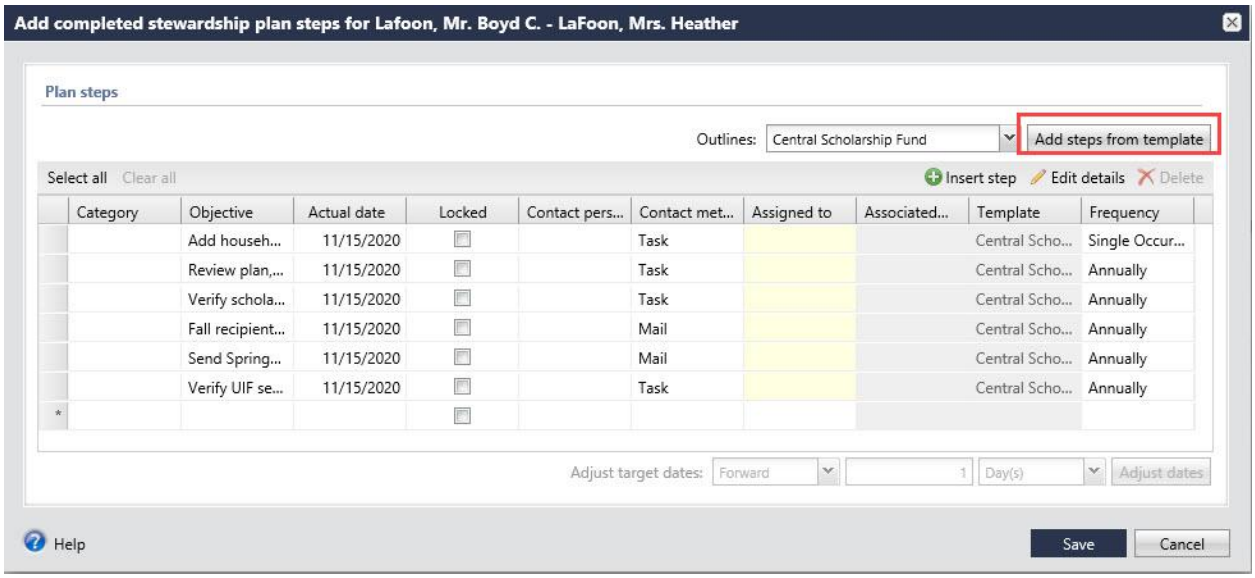
From this screen you can insert steps for a plan. Click **Save** when you have filled in the requested information.



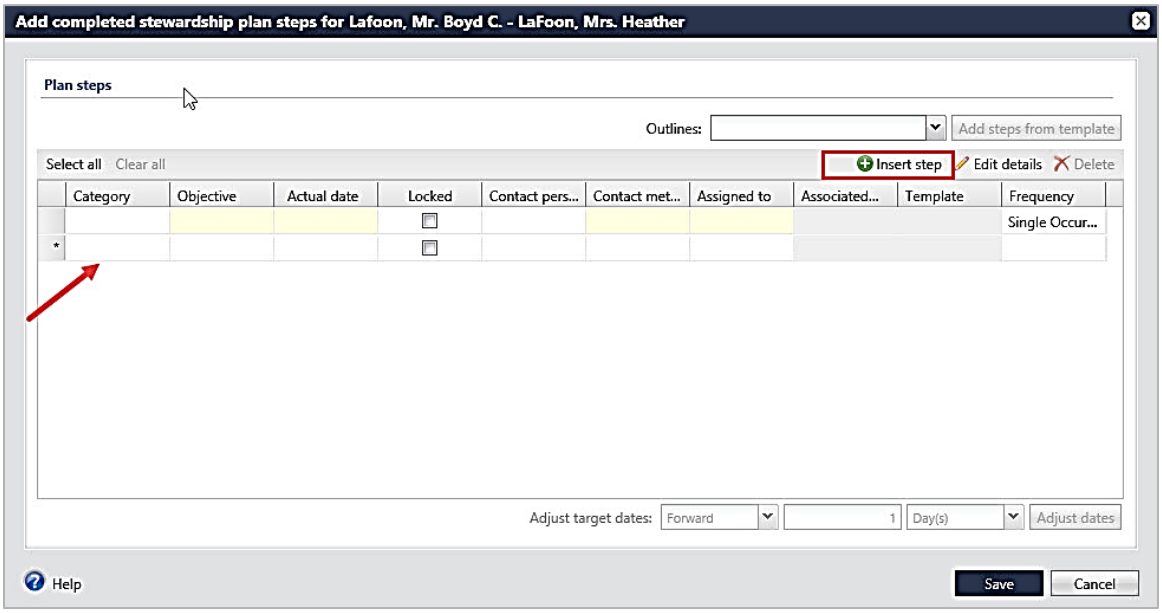
Note: Please see definitions for these fields in the Plan Steps Definition section.

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Clicking on the **Add steps from template** box provides prefilled steps that you can add information to such as Contact person, Assigned to and Associated Plans fields.



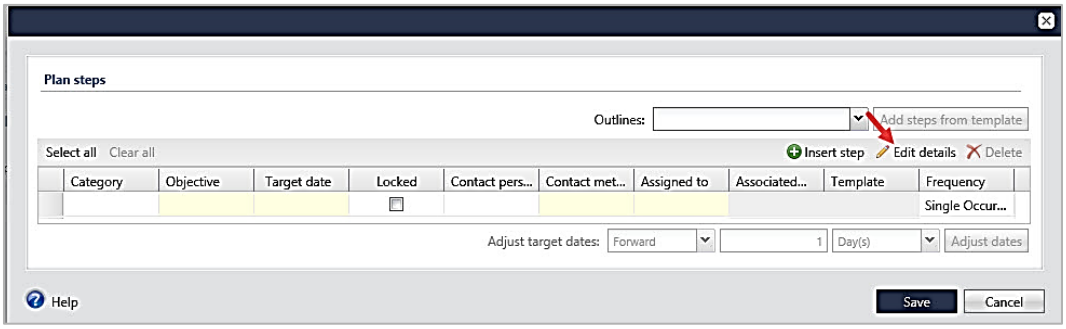
Clicking **Insert step** will add a row to the grid so you can enter the information for one step at a time.



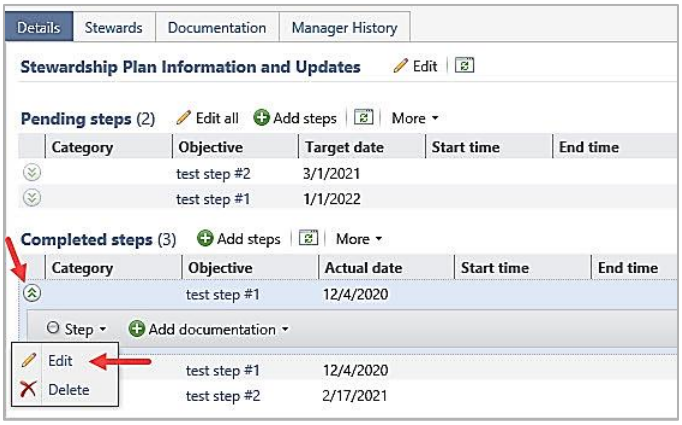
Note: Please see definitions for these fields in the Plan Steps Definition section

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You can edit the plan details using the **Edit details** button within the **Add steps** options.

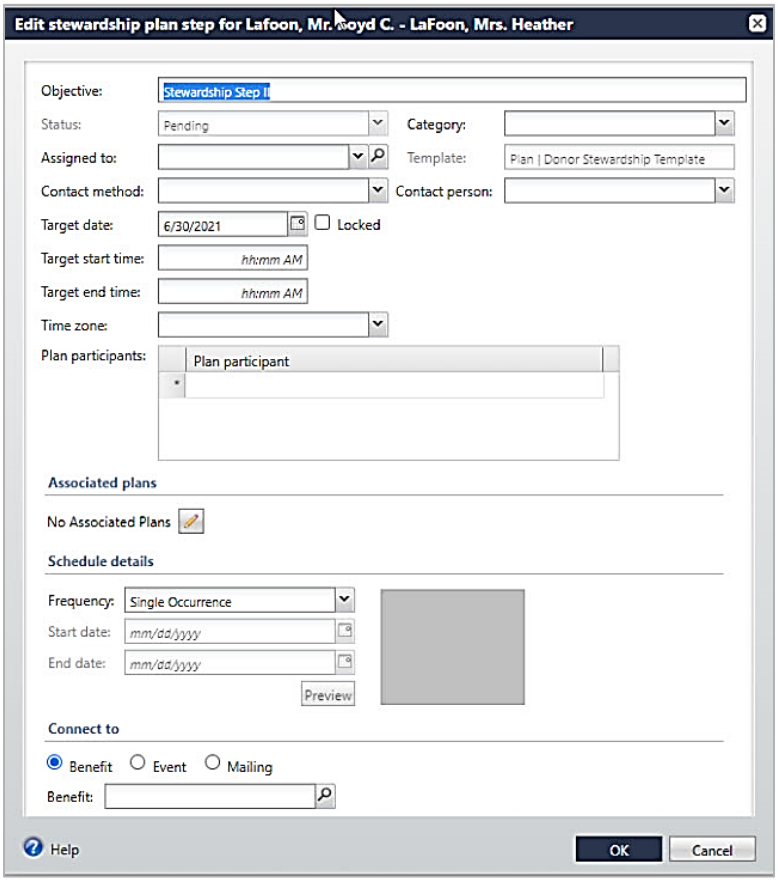


You can also edit the plan step details from the Details tab of the Stewardship Plan page under Completed steps by clicking the green arrows next to the step and click **Edit**



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The following window appears. Enter the necessary information and click **Ok**.

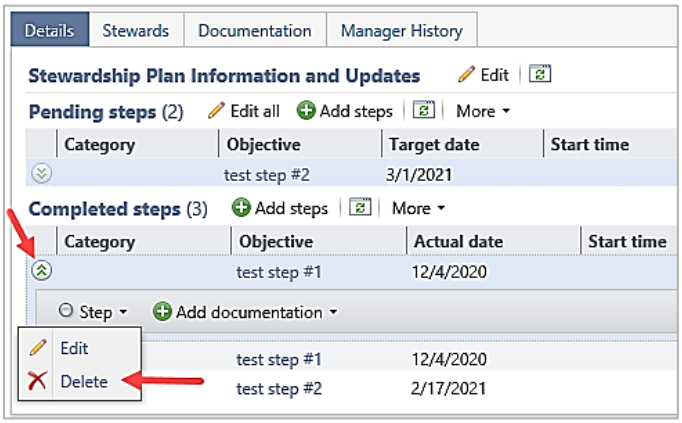


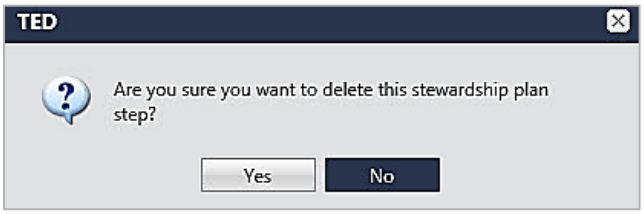
Note: Please see definitions for these fields in the Edit Stewardship Plan Step Screen Definitions section below.

From the **Completed steps** grid on the **Details** tab of the Stewardship Plan page, you can delete plan steps.

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Select the completed step you want to delete by clicking the green arrows next to it, and choose **Delete**

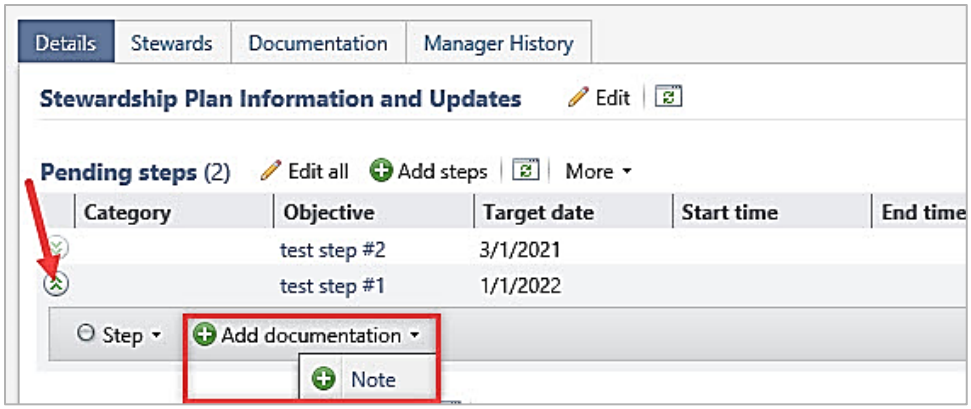




A confirmation screen appears giving you the option to choose **Yes** or **No**.

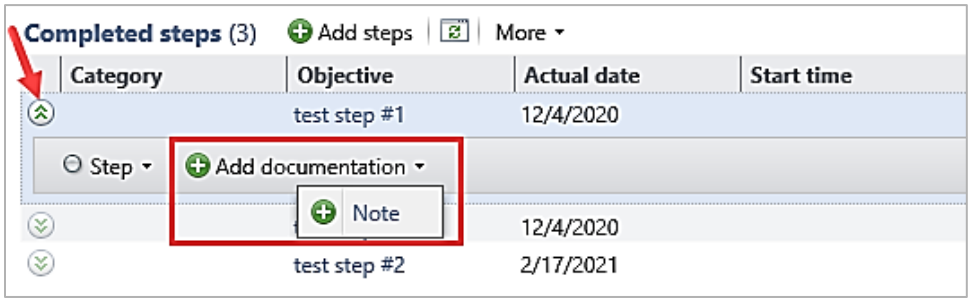
Add a Documentation Note to a Step

You can add documentation notes to an individual step. From the **Pending steps** section, click on the green arrows next to one of the steps and select **Add documentation** and click on **Note**.

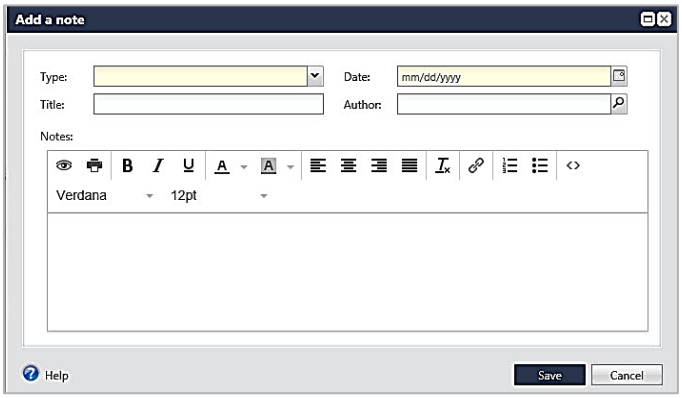


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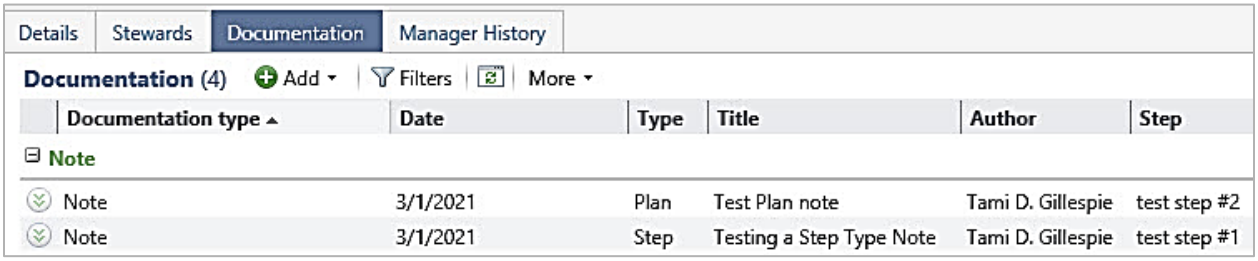
From the **Completed steps** grid, click on the green arrows next to one of the steps and select **Add documentation** and click on **Note**.



a) Choose the **Step type** in the type drop down to add the note to a step.
b) Add a date
c) Add a title of your preference.
d) Select an author from a constituent criteria search.
e) Enter the notes of your choice.
f) Click **Save**.



All notes added to the plan steps appear on the **Documentation** tab.



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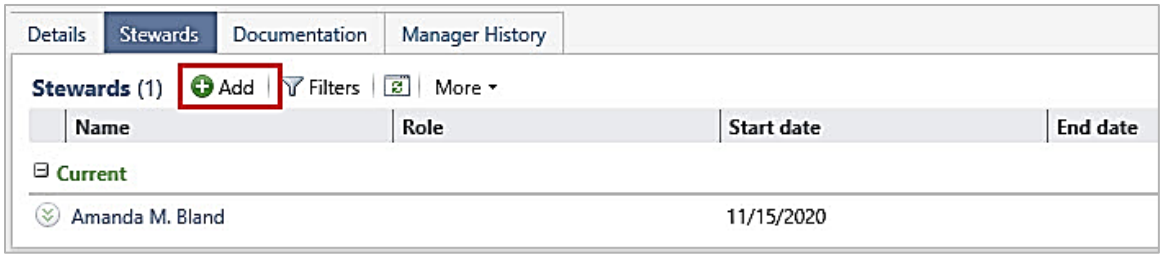
Stewards Tab

The **Stewards** tab lists all fundraisers associated with the plan and their stewardship roles (if they were assigned one). From this tab, you can go to a steward's constituent record, edit the stewards assigned to the plan or change a steward's role, and you can delete a steward from the plan.

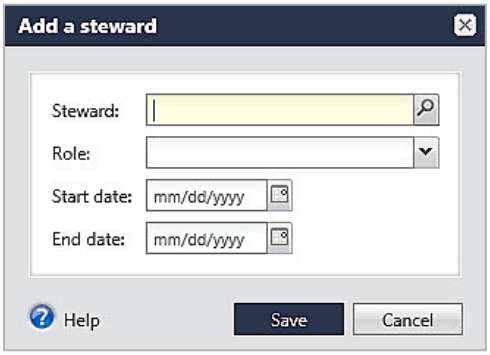
If a plan steward has a constituency of "Fundraiser," any assigned stewardship steps also appear on the steward's My Fundraiser page. On the steward's constituent record, go to the **Fundraiser** tab to view this information.

Adding a Steward

From the **Stewards** tab on the Stewardship Plan page, click **Add** and the Add a steward screen will appear.



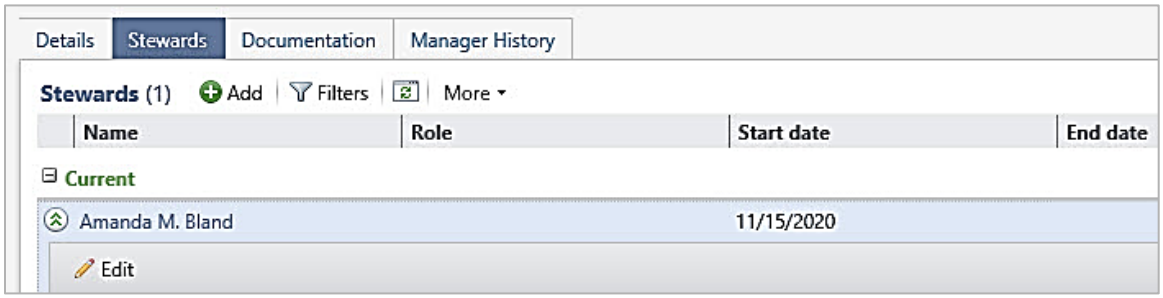
a) Enter a name in the Steward field and either click the magnifying glass or tab to the next field. This will bring up a constituent search window.
b) Click the drop-down for the role to choose from the list.
c) Enter a Start date
d) Enter an End date.
e) Click **Save**.



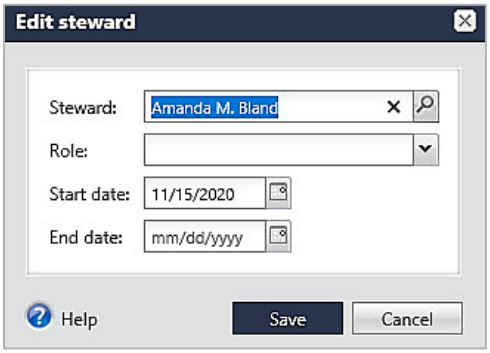
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Editing a Steward

You can also Edit the current Steward. From the **Stewards** tab, click on arrows next to the steward you wish to change and choose **Edit**.



a) Enter a name in the Steward field and either click the magnifying glass or tab to the next field. This will bring up a constituent search window.
b) Click the drop-down for the role to choose from the list.
c) Enter a Start date
d) Enter an End date.
e) Click **Save**.



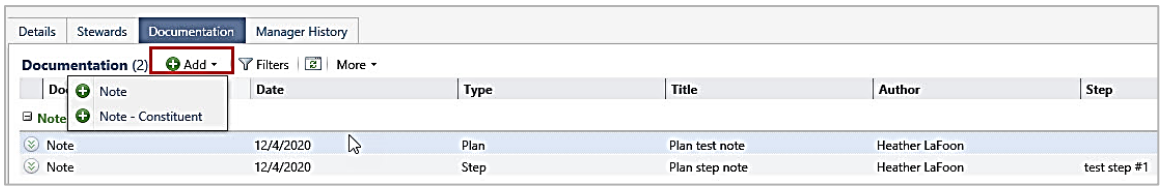
Documentation Tab

On the **Documentation** tab, you can view and add notes for information related to the plan. Notes that need to be attached to a specific step should be added to the step on the **Details** tab.

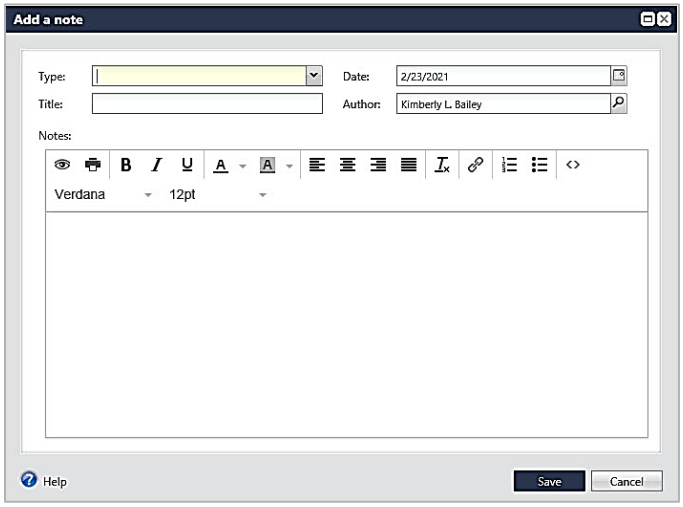
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From the **Documentation** grid, click **Add** and select **Note**.



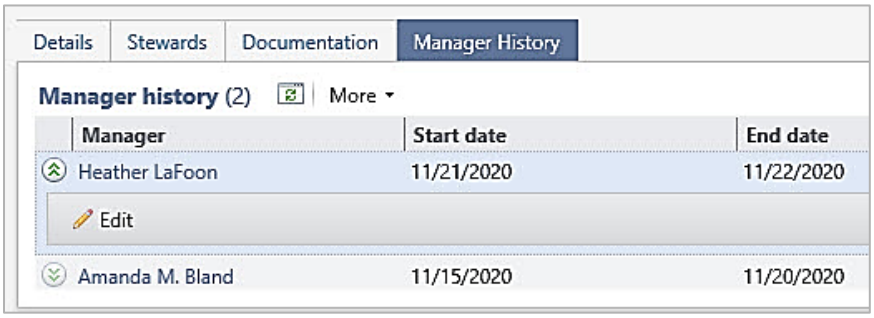
a) Choose **Plan** in the Type drop down.
b) Add a date
c) Add a title of your preference.
d) Select an author from the constituent search.
e) Enter the notes of your choice.
f) Click **Save**.



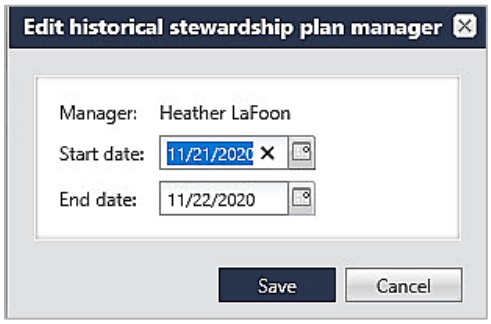
Manager History Tab

The **Manager History** tab on the Stewardship Plan page lists historical managers associated with the plan and their start and end dates.

To edit a Manager, click the green arrows next to the historical manager you wish to change and click **Edit**.



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Adjust the start and end dates as necessary and click **Save**.

Stewardship Plan Best Practices

- If you know that plan steps will reoccur, mark the frequency at the time the step is added so that the step will automatically be added to your pending steps tab as well as the interaction tab.
- Use consistent naming conventions within your unit to make the reporting process easier.

- In order to see steps from a plan on an individual record, the individual must be added as a participant to the plan step, even if they are already a participant on the plan itself.

- Multiple people in advancement can be selected as plan stewards with different roles for a stewardship plan; the stewardship plan will show on all of their fundraising portfolios. However, only 1 person in advancement can be selected to have a plan step assigned to them; steps only show on the fundraising pending activity tab for those who have been assigned the individual step.

REVIEWED 6/13/24

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PROSPECT MANAGER HISTORY & PROSPECT TEAM SUB-TABS

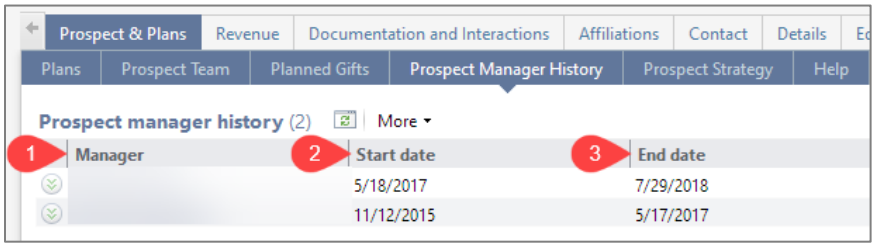
KNOW THE KEY PLAYERS WORKING ON THE PLAN(S)

The Prospect Management team for a prospect comprises any individuals or organizations participating in the prospect strategy. The Prospect Manager History and Prospect Team subtabs display information on both current and prior advancement staff associated with the constituent.

The descriptions below detail viewing these two sub-tabs from a constituent's household record. Similar information will be displayed on a constituent's individual record as well as organization records. Prospect Manager History information between the household and individual records may not always match. To report anomalies between the two record types (household vs. individual), contact UIF Research and Portfolio Management.

Reading the Prospect Manager History Sub-Tab

The Prospect Manager History sub-tab on the household record displays the name of the fundraiser assigned to the prospect manager role for the household. Prospect managers direct and coordinate the overall strategy for a prospect, so they are assigned to the household in general instead of to a specific plan.



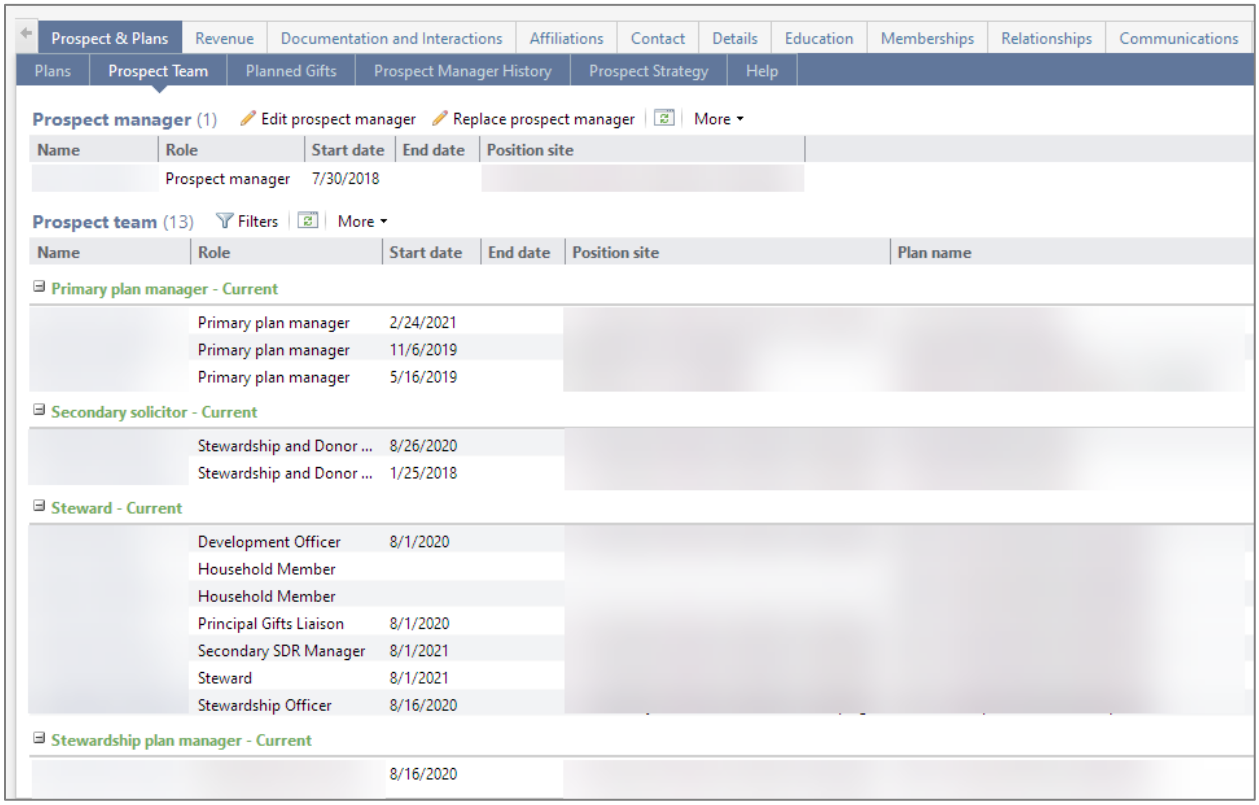
1. The **Manager** column displays the name of the fundraiser as a hyperlink. Clicking the hyperlink will open the fundraiser's constituent record.
2. The **Start date** column displays the date the fundraiser began their prospect manager assignment.
3. The **End date** column displays the date the fundraiser ended their prospect manager assignment.

Reading the Prospect Team Sub-Tab

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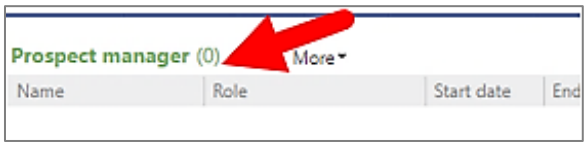
The Prospect Team sub-tab can display both current and former prospect management team members. Prospect management team members include any current prospect managers, current and former primary plan managers, current and former secondary solicitors, current and former stewards (for stewardship plans), and current and former stewardship plan managers.



Begin on the **Prospect & Plans** tab of the household record. Select the **Prospect Team** sub-tab.

Prospect Manager

The Prospect Manager section displays the name of the current prospect manager assigned to the household record. If there is no prospect manager assigned, the area will be left blank.



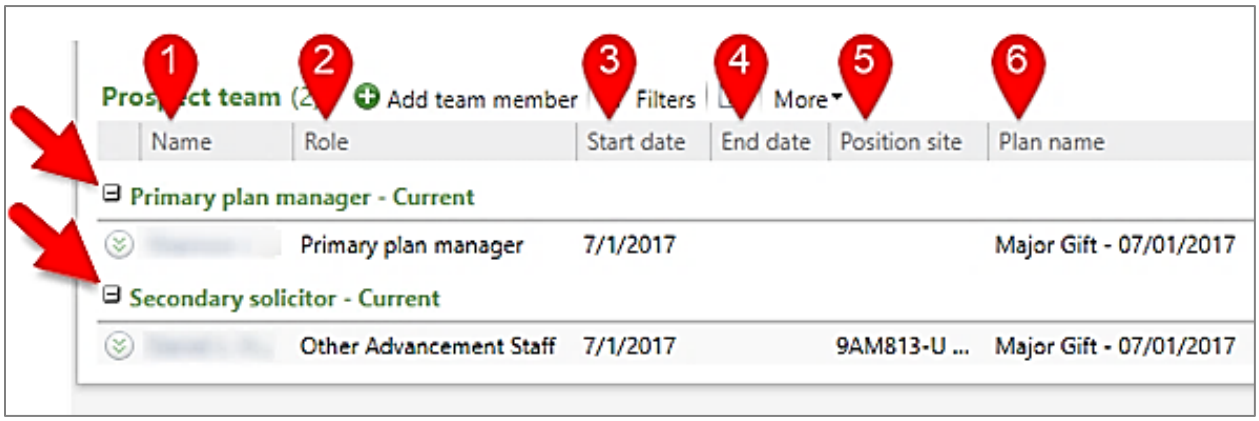
Prospect Team

The Prospect team section displays the name of current or former prospect management team members depending on the selected filter.

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Columns



1. The **Name** column displays the fundraiser's name as a hyperlink. Clicking the hyperlink will open the fundraiser's constituent record.
2. The **Role** column identifies the role type assigned to the fundraiser. Each role type is displayed in a separate section.
3. The **Start date** column displays when the fundraiser began working on that specific plan.
4. The **End date** column displays when the fundraiser ended working on that specific plan.
5. The **Position site** column displays the shortcode and name of the site associated with the fundraiser.
6. The **Plan name** field displays the name of the plan the fundraiser is associated with.

Filter

1. Select the **Filters** option to expand the window.
2. Check the **Show prior team members** checkbox.
3. Selecting **Apply** will display the prior team members on the list below.
4. Selecting **Reset** will remove the prior team members from the list below.



5. Prior team members will display under a section labeled as prior.

Requesting a Prospect Manager

Prospect Managers can only be added by the UIF Research and Portfolio Management (RPM) team. Please contact your unit's RPM liaison for assistance.

REVIEWED 04/21/2025

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PROSPECT STRATEGY SUB-TAB

THE OVERARCHING, COHESIVE APPROACH TO MANAGING PROSPECT RELATIONSHIPS

Prospect Strategy documents the overall strategy for a particular prospect. The University of Illinois began tracking prospect strategy in the advancement database in 2014 beginning with Principal Gift prospects, and now any prospect can have a documented strategy.

Please note that prospect plans, and their associated plan steps, are used to document the strategy *for a particular objective*. The prospect strategy is used to document the strategy *for the prospect as a whole*. A prospect strategy may lay out actions that are excuted across multiple prospect plans.

Reading the Prospect Strategy Sub-Tab

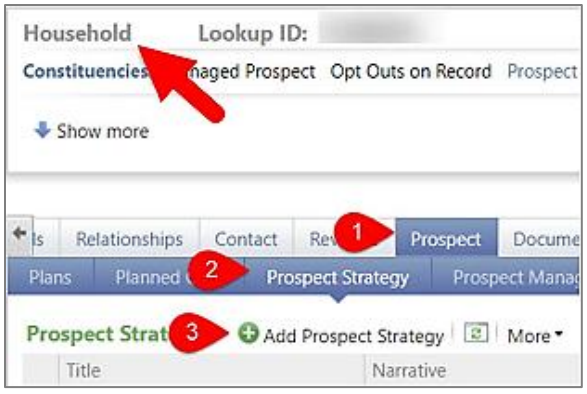
The Prospect Strategy sub-tab consists of three different areas: Prospect Strategy, Active Prospect Plans, and Household Active Prospect Plans.

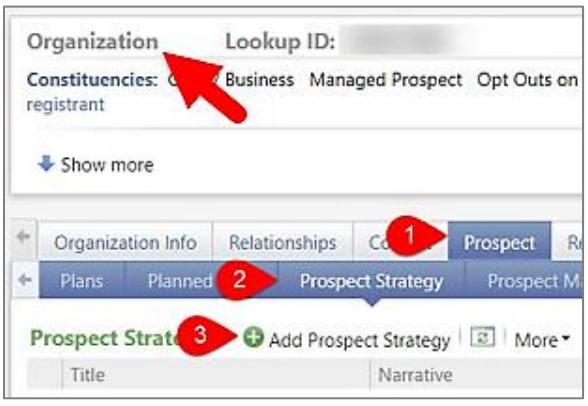
Note: The Household Active Prospect Plans section only displays on a household record.

Prospect Strategy Operations

Prospect Managers should create and maintain the Prospect Strategy for all prospects they manage in that role.

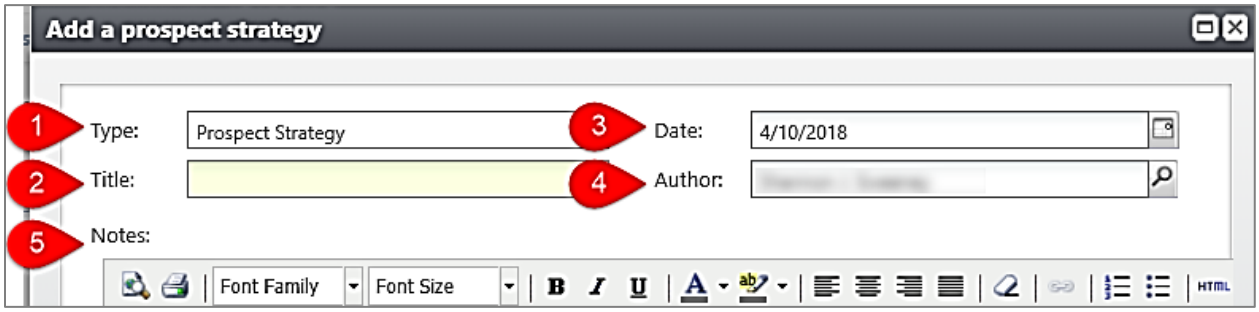
Adding a Prospect Strategy





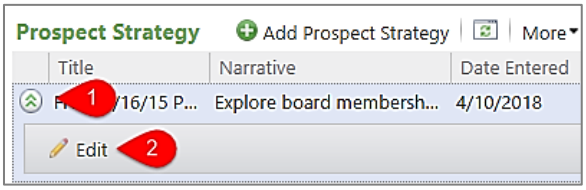
1. To add a Prospect Strategy, navigate to a constituent's household record (or an organization record), and click the **Prospect** tab.
2. Click the **Prospect Strategy** sub-tab.
3. Click the **Add Prospect Strategy** button.

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1. The **Type** field will auto-populate with Prospect Strategy. No change is necessary.
2. The **Date** field will auto-populate with today's date. Update if needed.
3. Add a short description of the prospect strategy to the **Title** field. This is a required field.
4. The **Author** field will auto-populate with the user's name. If adding the strategy for someone else, update with the appropriate name.
5. Add details of the strategy in the **Notes** field.

Editing an Existing Prospect Strategy



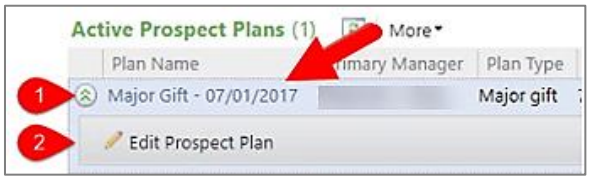
1. To edit an existing prospect strategy, click the **double chevrons** to the left of the prospect strategy name to expand the action menu.
2. Click the **Edit** button to open the Edit prospect strategy window. Update the strategy and save the changes.

Active Prospect Plans

The Active Prospect Plans section displays any active plans associated with the household or organization record and the narrative for that particular plan. The narrative on the plan should briefly state the objective for that particular plan.

Plan names are displayed as hyperlinks, and clicking them will open the plan record.

To edit plan steps from this screen:



1. Click the **double chevrons** to the left of the plan name to expand the action menu.
2. Click the **Edit Prospect Plan** button to edit the prospect plan steps.

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Household Active Prospect Plans

The Household Active Prospect Plans displays plans that have been added to the individual constituent's record. Since plans should not be added to individual constituent records, this field should always be blank.

REVIEWED 4/08/25

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PROSPECT RESEARCH HISTORY SUB-TAB

SEE CURRENT AND COMPLETED RESEARCH REQUESTS

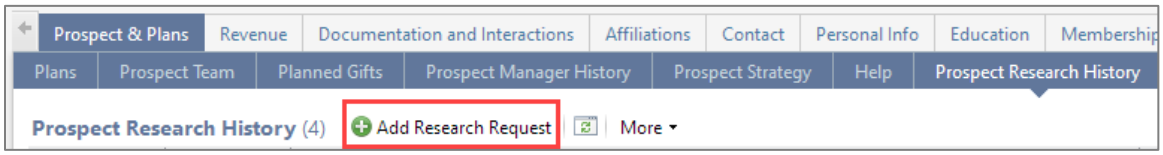
The Prospect Research History sub-tab displays any Research Requests made on the constituent.

Research History Sub-Tab

Begin on the Prospect & Plans tab of an individual constituent record. Select the Prospect Research History sub tab. Research Requests are filed on individual constituent records, so the Prospect Research History is only viewable from individual constituent (or organization) records, not from household records.

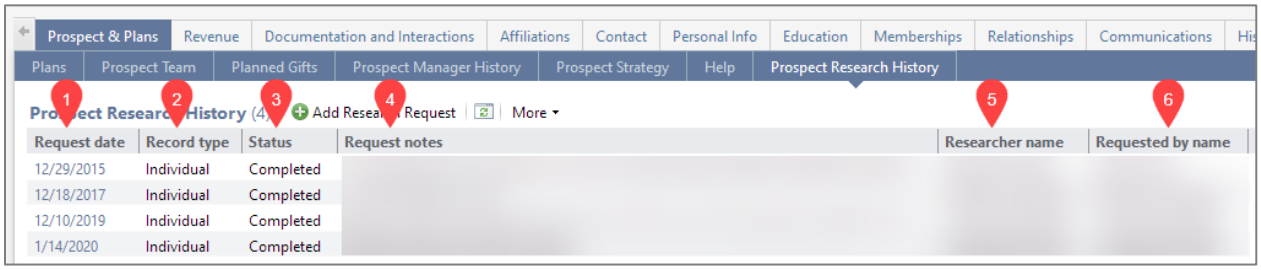
Requesting Research

The **Add Research Request** button allows advancement staff to submit requests to the UIF Research and Portfolio Management team.



Prospect Research History Columns

The Prospect Research History Columns display information on the requests made for additional information on the constituent.



1. **Request Date** displays the date the Research Request was submitted.
2. The **Record Type** displays either **Individual** or **Organization**. These are the only two record types for which Research Requests can be submitted.
3. The **Status** will display **Pending** or **Completed**. Pending requests have been submitted but are not completed.
4. **Request Notes** display the information included in the Notes section of the Research Request.
5. The **Researcher name** displays the UIF Research and Portfolio Management team member who completed the search.
6. The **Requested by name** displays who received the search results.

UPDATED 4/10/25

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REGION CODES TAB

Documentation to be determined

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RELATIONSHIPS TAB

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RELATIONSHIPS OVERVIEW

AN OVERVIEW OF TED RELATIONSHIPS

In a complex and connected university system and world, relationships are critical to a successful Advancement program. Often relationships extend beyond the traditional gift officer-to-prospect type. Knowledge of familial or personal, university, or employment and non-employment relationships an individual has with an organization, and organizations' relationships to one another can provide entry for Advancement officers, faculty, or staff to expand and strengthen relationships with a larger network that may extend beyond the University of Illinois System.

The information contained in relationships, in all its iterations, allows the University to further refine approaches to outreach, engagement, and prospecting. This data is key to developing and maintaining a targeted and impactful Advancement program.

Relationship Types

Individual to Individual – This includes but is not limited to parent/child, mentor/mentee, or acquaintances.

Individual to Organization – This includes both employment and non-employment relationships between an individual and an organization.

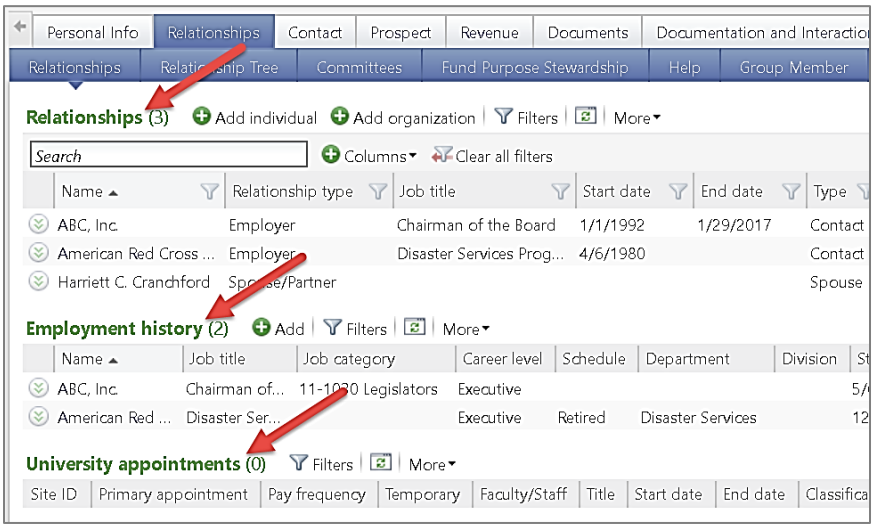
Organization to Organization – This includes a corporation's general hierarchy with both parent and subsidiary companies as well as gift matching organizations or foundations associated with the organization.

Relationships Sub-Tab

The Relationships tab on the Individual record is divided into 3 sections.

Relationships - Constituents can have relationships with either another Individual or with an Organization. Organization relationships are not limited to employment.

Employment history – This section lists any current or former employment relationships.

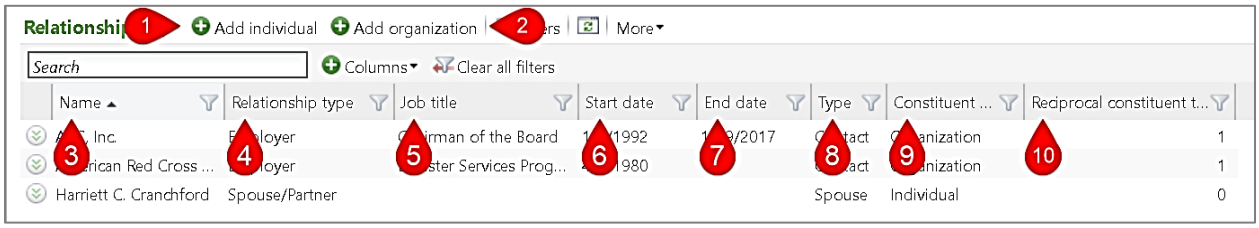


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University appointments – This section lists any employment specific to the University of Illinois System. This includes any position added to the Banner system such as former appointments, student employees, and Health Science residencies.

Residency appointments will display in the University Appointments area; additional details, such as medical specialty (pediatrics), will display on the Personal Info tab in the Specialties section.

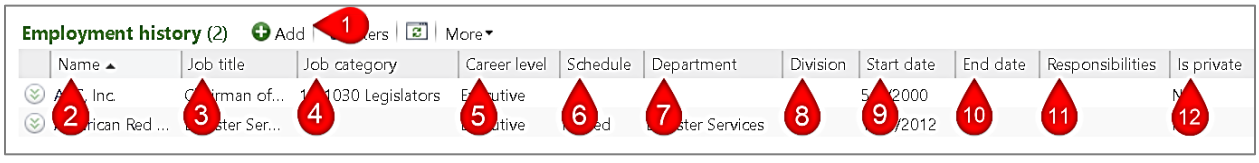
Relationships Section



1. Select **Add individual** to add an individual type relationship to the constituent's record.
2. Select **Add organization** to add an organization type relationship to the constituent's record.
3. The **Name** column indicates the name of the individual or organization with which the constituent has a relationship.
4. The **Relationship type** column indicates the type of relationship held between the constituent and the other individual or organization. There are a large variety of relationship types available in the TED system. Relationship Types include familial, employment or non-employment, educational, or acquaintance type relationships.
5. The **Job title** column displays the constituent's job title as entered by the user.
6. The **Start date** column identifies the start of the relationship.
7. The **End date** column identifies the end of the relationship.
8. The **Type** column indicates if the relationship is a Spouse, Contact, or Primary Contact.
9. The **Constituent type** column indicates if the relationship is with an organization or with an individual.
10. The **Reciprocal constituent type** column indicates an employment relationship. This column is key if the relationship between the individual and the organization needs to be edited in the future.

**If the Reciprocal constituent type column does not appear on the record, select the Columns option and apply the column. This will refresh the page with the column now available. **

Employment History

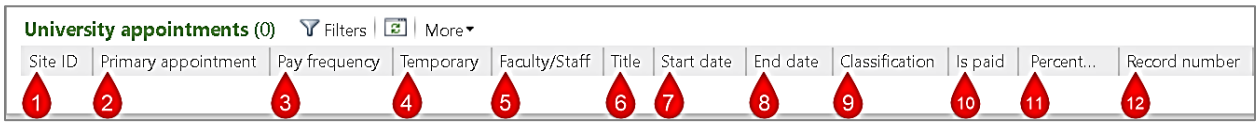


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1. The **Add** option allows the user to update employment titles for an organization with which the constituent has had a previous employment relationship.
2. The **Name** column indicates the name of the organization.
3. The **Job title** column indicates the job title the constituent holds at the organization.
4. The **Job category** column indicates the US Standard Occupational Classification (SOC) code for the position the constituent has with the organization. The SOC system classifies workers into 23 major occupations, with detailed occupations within each of the groups. If there is no detailed SOC code available for the specific position the constituent holds within the organization, the column will indicate the closest major occupation group. See the Individual to Organization Relationships documentation for additional information.
5. **Career level** column indicates if the constituent is an executive or if his/her career level is unknown.
6. The **Schedule** column indicates if the constituent is retired, part-time, or temporary.
7. The **Department** column indicates the specific department of an organization with which the constituent works. This field can work in conjunction with the Division field on the record. For example, Prof. Brian Dolber (10673522) is a professor of communication at California State University, San Marcos. Prof. Dolber's college (Humanities, Arts, Behavioral and Social Sciences) can be entered in the division field, while his department (Communication) can be entered in the department field.
8. The **Division** column indicates the specific division of the organization with which the constituent works. For example, Xiaoxuan "Lily" Chen (10970129) worked for the ExxonMobil Corporation specifically in the Africa, Asia Pacific, and South American division of the company.
9. The **Start date** column indicates the day the constituent began working with the organization or the day he/she began a specific role with the organization.
10. The **End date** column indicates the day the constituent stopped working with the organization or the day he/she stopped a specific role with the organization.
11. The **Responsibilities** column should only contain details of the constituent's job duties if the duties are not explicitly part of the job title. For example, Mark Steinberg's (11326127) title is Partner with Excel Sports Management in the Professional Golf Division. His specific job responsibilities include being Tiger Woods' manager.
12. If the **Is private** column shows a check the employment information should be kept private. The Is Private selection will not remove the information from surfacing in communication list pulls.

University Appointments



1. The **Site ID** identifies which campus, college, and department is associated with the constituent's UI employment.

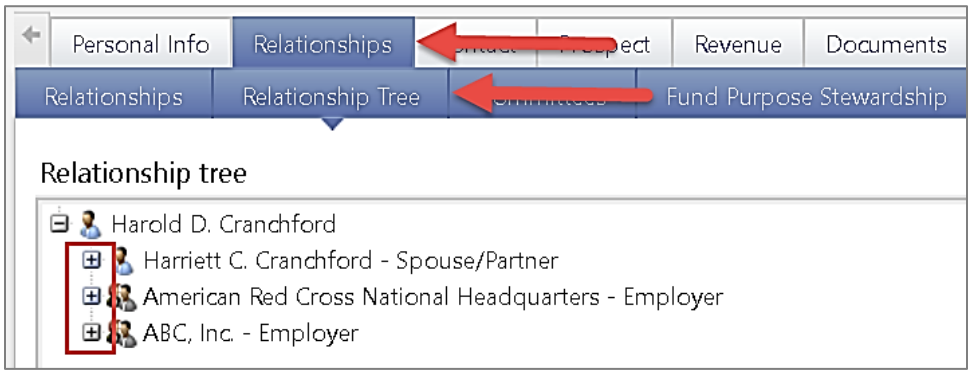
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2. The **Primary appointment** has the highest percentage of time allocated. This is also normally the area that pays the constituent.
3. The **Pay frequency** indicates how often the constituent is paid.
4. The **Temporary** column indicates if the position is a temporary or a permanent position.
5. The **Faculty/Staff** column indicates if the position is a faculty, staff, or a manually entered unit reported position.
6. The **Title** column is the title associated with the appointment. This is not always the official title the constituent holds, but often an abbreviated form of the title.
7. The **Start date** indicates when the constituent began the appointment.
8. The **End date** indicates when the constituent ended the appointment.
9. The **Classification** comes from information stored on the university appointment in Banner. This includes Employee Class, Services Reference, Rank, Rank Modifier, and Status Modifier. Examples of this would be Academic Professional, Academic Hourly, Faculty Tenured, Department Head, RAMP Administrator, Graduate Teaching Assistant, Fellow Postdoctoral, etc.
10. **Is paid** indicates that the appointment is a paid position.
11. The **Percentage** column indicates the amount of time allocated to that specific appointment.
12. Banner identifies each appointment with a unique **Record number**. To help link the appointment between the two systems, the unique record number from Banner is imported with the other appointment information. University appointments that are manually added to the TED system will have a unique record number starting with the letters NB. The unique record number will not be overwritten when new information is added to TED from the Banner data pull.

Relationship Tree Sub-tab

The Relationship Tree sub-tab is an alternate way of looking at a constituent's relationships. The relationship tree shows how each relationship with the constituent has links to another relationship in the TED system.

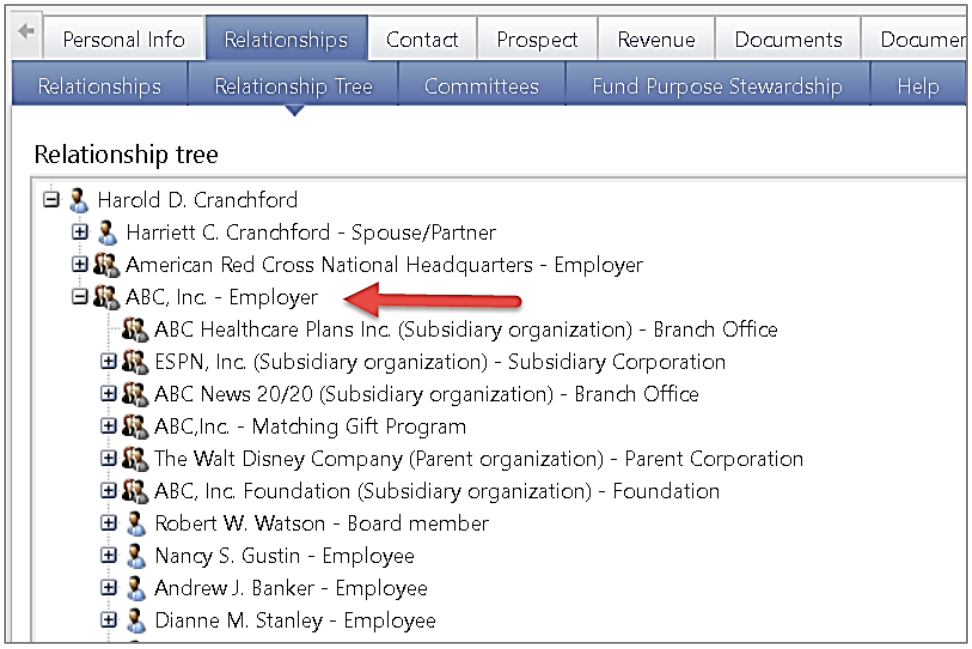
For example, when looking at a constituent's Relationship tree select the plus sign to the left of his/her primary employer. This will expand to show additional relationships with that employer. This can be a key tool in identifying how constituents are linked together.



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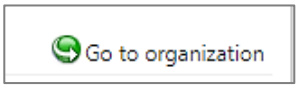
1. Begin on the constituent's individual record.
2. Select the Relationships tab.
3. Select the Relationship Tree sub-tab.
4. Using the plus and minus signs to the left of the individual or organization will expand and collapse the selection showing additional relationships to that individual or organization.

To view a specific constituent from the Relationship tree begin on the Relationship Tree sub-tab.



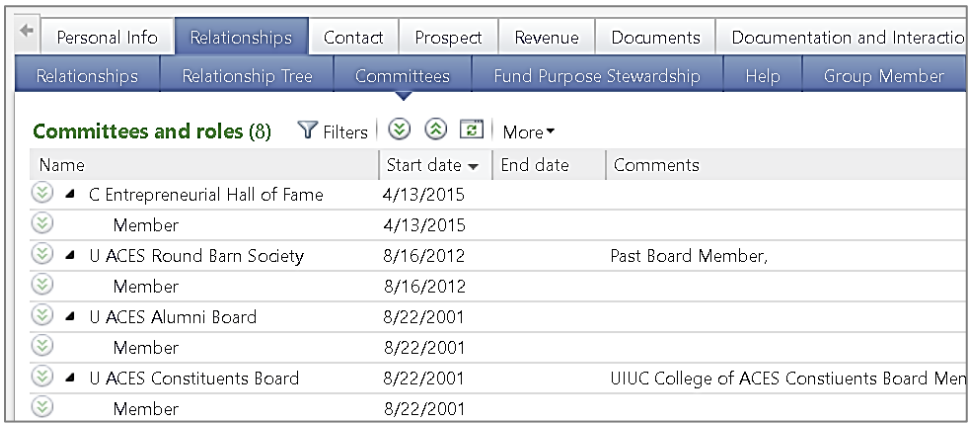
1. Select the name of the constituent.
2. In the upper right-hand corner of the sub-tab either Go to Individual or Go to Organization will become available. Select this option to go to the constituent's record.





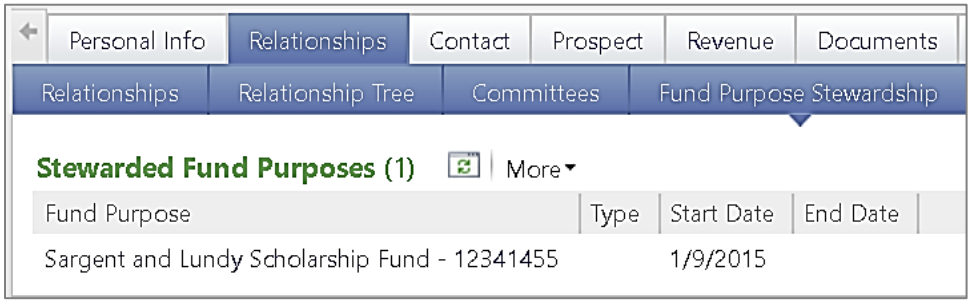
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Committees Sub-Tab



Committees are a specific type of group record in the TED system. Committees identify larger groups of individual constituents who are grouped together based on a common interest.

Fund Purpose Stewardship Sub-Tab



The Steward Fund Purpose allows users to identify and associate key donors and friends with specific funds. This enables easy tracking of constituents who will receive special stewardship.

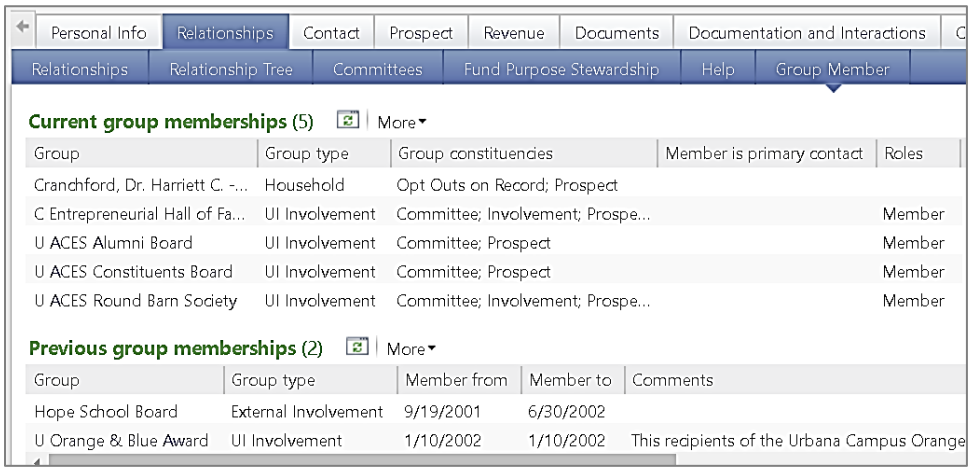
Once an individual record has been added as a Stewardship Recipient to a designation or fund the information will surface on the individual record under the Fund Purpose Stewardship sub-tab under the Relationships tab.

It is important to note this information is not added or edited from the household or individual record. It can only be added or edited from the Fund record when the individual record is added as a stewardship recipient.

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Group Member Sub-Tab



The Group Member sub-tab identifies different groups the constituent is a member of in the TED system. This includes both current and previous group memberships.

Help Sub-Tab

The Help sub-tab is populated with documentation related specifically to TED relationships.

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RELATIONSHIPS – START & END DATES

FOR INDIVIDUAL-TO-INDIVIDUAL OR INDIVIDUAL-TO-ORGANIZATION TYPES

Ideally, users will always create and update records with specific, confirmed details. However, in cases when the available data is partial or ambiguous, users will still need to create and update relationships. This document is used to describe the many variations of start and end dates users may encounter in TED.

The following guidelines apply to dates for Individual-to-Organization type relationships and are not meant to apply for all areas in TED where start and end dates are used (e.g., Contact Information). Currently there is no requirement to enter start dates or end dates for most individual-to-individual relationships, with the exception of the Spouse/Partner relationship, though it is highly recommended to do so when the information is available.

General Guidelines for Entering Known Dates

1. If the precise start and end dates are known for relationships, enter using the MM/DD/YYYY format.
2. When involvement is current, the end date is left blank.
3. When the month and year for start and end dates are known, but not the exact day, the start date should be entered using the first day of the known month, and the end date using the last day of the known month. For example, if the user knows the constituent was an employee of the company from October 2015 through August 2017, the relationship start and end dates should be entered as 10/01/2015 (start date) and 08/31/2017 (end date).
4. When only the year is known for start and end dates, but not the month or day, the start date should be entered using January 1 and the known year for a start date, and December 31 of the known year for an end date. For example, if the user knows a constituent was on the board of an organization from 2012 through 2016, the relationship start and end dates should be entered as 01/01/2012 (start date) and 12/31/2016 (end date).
5. The above guidelines may be applied in varying combinations. For example, if the user knows that a constituent began serving on a board in 2013 and that they left the board in May 2015, the start and end dates would be entered as 01/01/2013 (start date) and 05/31/2015 (end date).
6. When constituents have more than one position with an organization, the dates cannot overlap in the employment history section. When adding a new job title for a current employer with a specific start date, this will automatically end date the previous job title with yesterday's date.
7. However, when performing employment history cleanup, users may have to adjust the months, days, or years accordingly to ensure that end dates and start dates do not overlap. For example, if it is known that the individual was promoted to President in April 1998, and previously served as Vice President, they may enter the end date for the Vice President role as 03/31/1998 and the start date for the President role as 04/01/1998.

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Guidelines for Individual-to-Organization with Vague or Unknown Dates

A variety of configurations may be encountered for start and end dates where either the start date and/or the end date are unknown. There is also the possibility that the end user may be unable to confirm the current status of a relationship. Solutions for these various scenarios are outlined below:

1. When involvement is confirmed current but start date is unknown – do not enter a start or end date.
2. When involvement is confirmed former, and end date is known but start date is unknown – Enter the end date but do not enter a start date.
3. When involvement is confirmed former, and the start date is known but the end date is unknown – Enter the start date and use the same date for the end date.
4. When involvement is confirmed former and neither the end date nor the start date is known – enter 01/01/1900 date as both the start and end dates.
5. When status cannot be confirmed and neither the end date nor the start date is known – enter 1/1/1900 as the start date and leave the end date blank.

Guidelines for Spouse/Partner Relationships

1. Currently, the Spouse/Partner relationship is the only individual to individual relationship type that requires a start date. When submitting biofeedback to have a Spouse/Partner relationship created, the end user may provide a start date if one is known. For example, if the end user knows the constituents were married on June 24, 1977, they can specify this date.
2. Similar to the conventions for individual to organization start and end dates, Spouse/Partner relationship start dates may reflect the most detailed information available. When submitting biofeedback, the end user may include a year that a Spouse/Partner relationship began if that is the only information available. For example, if the end user notes that a couple was married in 1996, the Spouse/Partner relationship will have a start date of 1/1/1996.
3. Spouse/Partner relationships should have an end date if the relationship has dissolved. If the end user knows the exact date or an approximate date when the relationship was dissolved, this should be submitted with the biofeedback request
4. If the start date and/or end date of a Spouse/Partner relationship is unknown, the Advancement Information Management and Support (AIMS) team will use the date the information was added to the system for an unknown start date, and the date the relationship status was updated in TED as the end date.

Reporting

1. For accurate reporting, and in order to maintain the integrity of the data in TED, start and end dates should always be entered with as much known detail as possible.
2. Reports will pull the start and end dates as entered in the system.
3. The Research and Portfolio Management team's current biography process interprets dates in fiscal years. Because of this dates may display differently in the biography than they are entered on the record. This has been built into the biography process to ensure accurate display of giving

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information. However, this does not change the process for how to enter start and end dates in TED. A caveat about all dates being fiscal year only appears on each biography.

Cleanup

1. Start date and end date information was converted inconsistently from the legacy system. As end users encounter records with incomplete or inaccurate date information, he or she should update the date information with more precise detail when possible.
2. The Research and Portfolio Management team is aware of inconsistent start and end date information on records and cleans up these areas accordingly when performing relationship updates on a record.
3. The comments field in the Relationship information screen should be used to differentiate between updated and unconfirmed relationships information. Blank dates plus no information in the comments may indicate the relationship information requires confirmation.

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INDIVIDUAL-TO-INDIVIDUAL RELATIONSHIPS

ADDING AND EDITING PERSONAL RELATIONSHIPS IN TED

In a complex and connected world, relationships are critical to a successful advancement program. This can include relationships that extend beyond the traditional gift officer-to-prospect relationship.

Familial relationships can help identify the scale of a family's connectedness to the institution for brand advocacy (e.g., multi-generational alumni or "legacy" families). These relationships also provide the foundation for a robust parent's program and are key to flagging prospects, via a qualification plan, whose assets may be temporarily reduced due to children in college, as well as identifying relationships of significance to the prospect that may be the basis for an honorary or memorial gift. Similarly, familial relationships identify next of kin to ensure donor intent beyond the life of the original donor, while the absence of children can often indicate a higher capacity for deferred gifts.

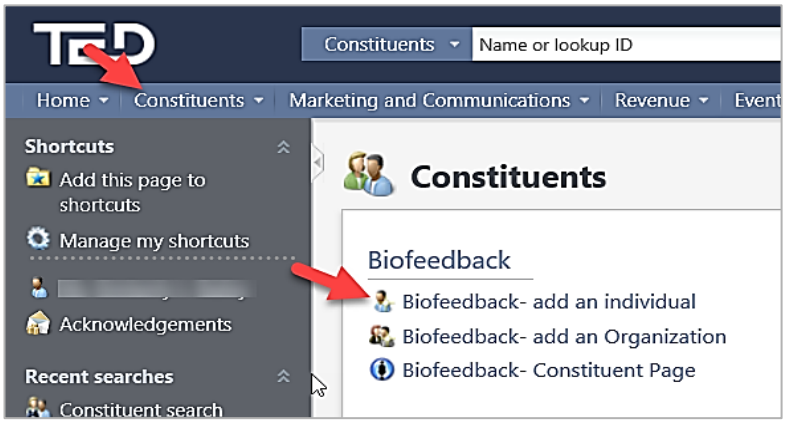
University-based relationships (e.g., advisor-advisee, mentor-mentee, and faculty-student) may denote a significant relationship that can be the basis for an honorary or memorial gift. Additionally, the university half of the relationship can be leveraged as a partner in gift proposals and can be a valued partner in engaging a constituent before, during, and after he/she becomes a major gift prospect. Often these University-based relationships are where a constituent's connection to the institution remains strongest.

Other personal relationships—friendships, acquaintances, etc.—can provide entry for an advancement officer or faculty member to expand and strengthen relationships with a network beyond the University of Illinois System. These relationships are important to opening doors for the University of Illinois and to doing early campaign feasibility or ongoing prospect peer screenings. These types of relationships also help with the identification of potential board or committee participation with the institution.

Adding Individual-to-Individual Relationships

Individual-to-Individual relationships are the people with whom the constituent is associated, such as a spouse, friend, family member, or business associate.

To add an Individual relationship to a record first, make sure that an individual record for both constituents exist in TED. If one of the records does not already exist, use the New Record Wizard on the Constituents menu to have the missing record created.



If a relationship between the two constituents already exists, do not

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edit the relationship details. To preserve the historical information, end date the relationship that is already in TED and add a new relationship with the updated details and new start date.

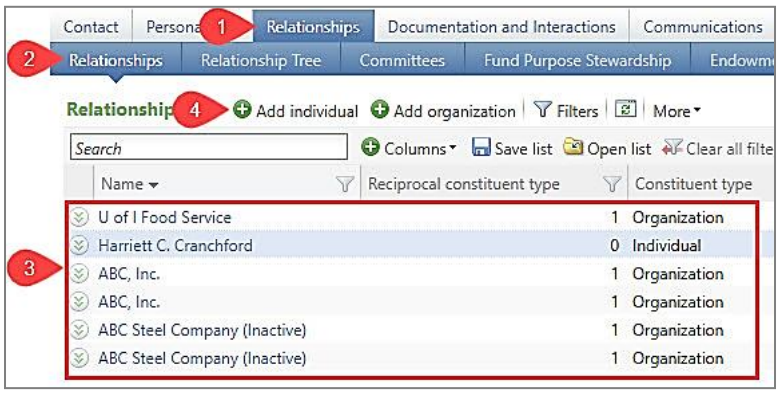
If a relationship between the two constituents does not exist, add the relationship.

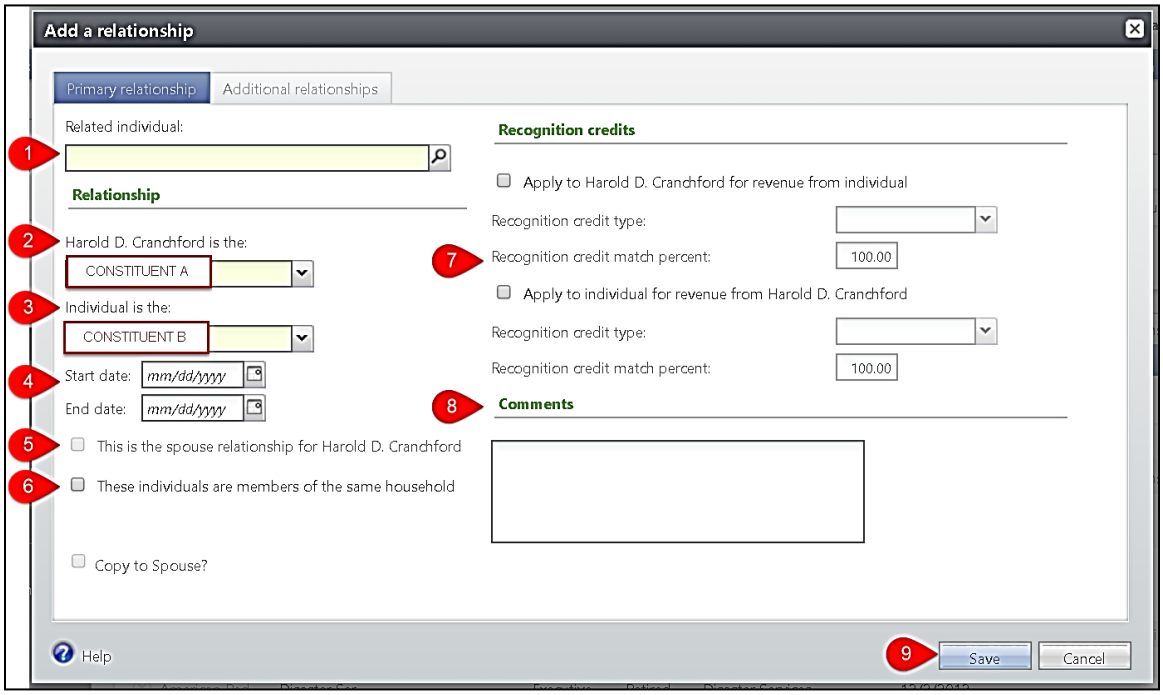
Add an Individual Relationship

Individual relationships are added from an individual constituent's record.

Navigate to one of the Individual records that will be linked through a relationship.

1. Select the **Relationships** tab.
2. Select the **Relationships** sub-tab.
3. Review the **Relationships** section on the record to ensure the relationship does not already exist.
4. Select **Add Individual** to open a window.





1. Fill in the **Related Individual** field.
    a. If you type in a name, a search will open if multiple people with that name exist.
    b. You can also select the Magnifying Glass to search.
2. Where it says **Constituent A is the:** select the appropriate relationship from the drop-down menu.

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3. TED will automatically fill in the **Constituent B** drop-down menu.

** Review the Individual-to-Individual relationship type table in the Relationships Value Table and Definition document for more information on available relationship types. **

4. Fill in the **Start date** and **End date** as appropriate.
5. **This is the spouse relationship for Constituent A** box is left unchecked, even if this is a spousal relationship. Instead, inform the UIF AIMS team of the relationship via a Bio Feedback Add request from the Comment tab of either constituent's individual record. When requesting a spousal relationship the following information is required:
    a. Complete name for each individual
    b. Lookup ID for each individual
    c. Any name, title, or suffix changes that will be made due to the marriage.
    d. If either constituent has a plan on his/her household record, include the plan name and with which constituent the plan is associated.
6. **These individuals are members of the same household** box is left unchecked even if this is a spousal relationship. Instead, request the creation of a spousal relationship via a Bio Feedback Add from the Comment tab of either constituent's individual record. The UIF AIMS team will make all necessary updates to the individual and household records. **These individuals are members of the same household** box which is also left unchecked in parent/child relationships. Household records contain only the constituent record or the records for the constituent and his/her partner, never a child.
7. Do not make any changes to any field in the **Recognition Credits** area. If this area needs to be adjusted contact UIF Gift Administration.
8. Fill in any **Comments** as appropriate. Comments always include the information source, or the where and how the information about the relationship was found.
9. Select **Save**.

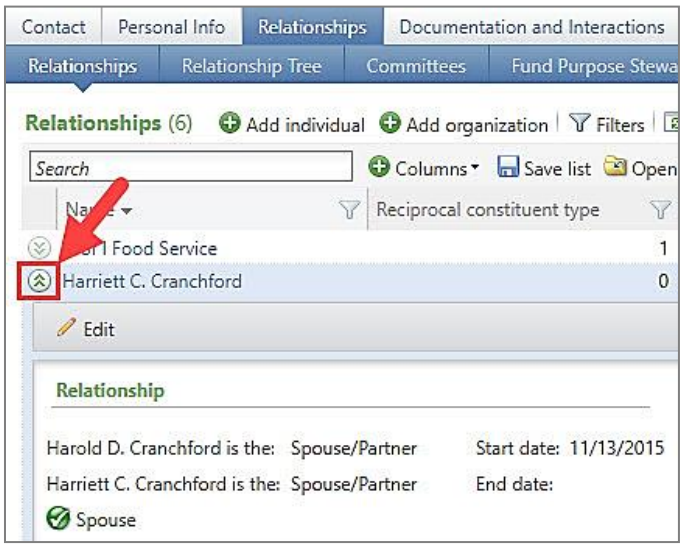
Expanding a Relationship

Expanding an Individual relationship will display additional information on the relationship. This includes any comments that have been added to the relationship.

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- To expand the relationship, select the **double arrows** to the left of the relationship name.

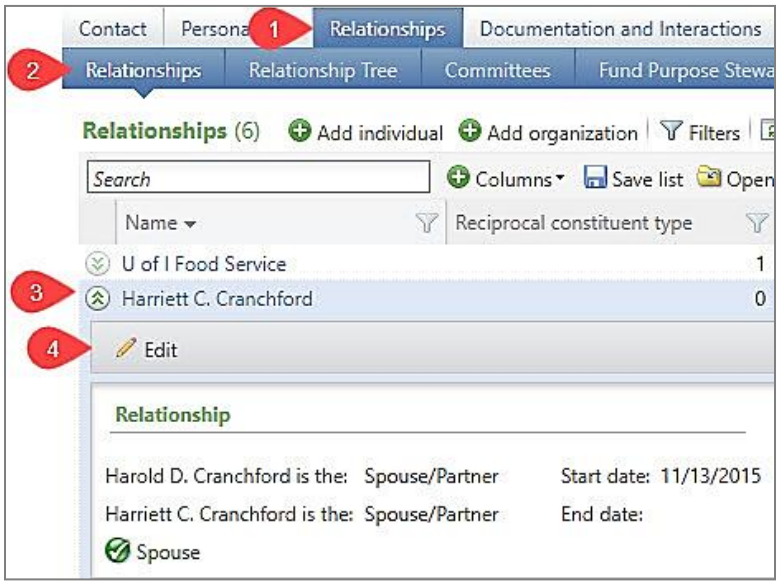


Editing the Relationship

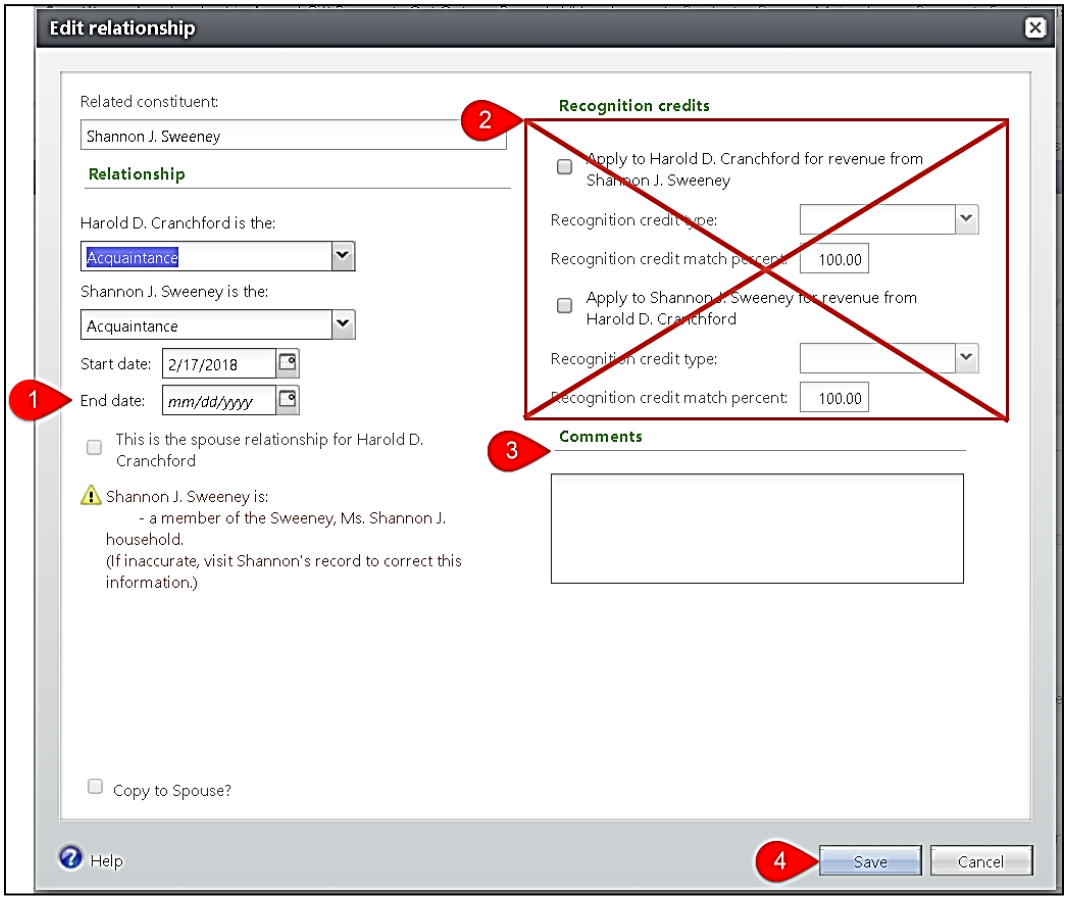
Individual-to-Individual relationships should only be edited when the relationship has ended. This can be because the relationship has completely ended or because the relationship has changed; for example, a Student and Instructor/Advisor relationship that becomes a Postdoctoral Researcher and Postdoctoral Supervisor relationship. This change in the relationship ends the prior relationship type and begins a new relationship type.

Begin on the Individual record of either individual in the relationship.

1. Select the **Relationships** tab.
2. Select the **Relationships** sub-tab.
3. Select the **double arrows** to the left of the name of the relationship that will be ending.
4. Select **Edit** to open a new window to edit the relationship.



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1. Add the appropriate **End date** to the record.
2. Do not change the **Recognition** credits.
3. Add any appropriate **Comments**. Comments should include the Information Source and any additional information on where and how the information was acquired.
4. Select **Save**.

*** If this is a spousal relationship DO NOT END DATE the relationship.** Contact the UIF AIMS group via a Bio Feedback Add request on the Comments tab of either individual record to request the constituent's spousal relationship be ended. **

Not Duplicate Relationships

In the robust TED system, there is a possibility that two constituents have matching names and similar locations but are distinct individuals. To preserve each constituent's individual record, and unique information, it is important that the records not be merged. A Not Duplicate relationship between the constituents identifies these records as separate distinct individuals. This identification helps prevent the inappropriate merging of the records.

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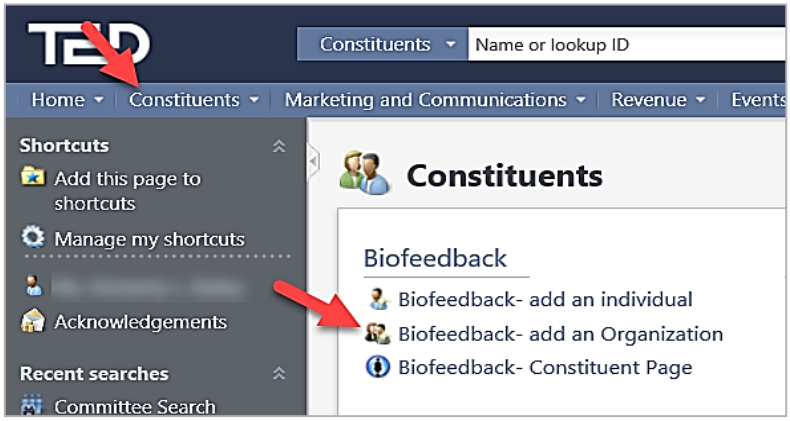
INDIVIDUAL-TO-ORGANIZATION RELATIONSHIPS

ADDING & EDITING EMPLOYMENT & NONEMPLOYMENT RELATIONSHIPS IN TED

Individual-to-organization relationships create visible and analytical cues for potential capacity, for individual prospect management, and for corporate or foundation engagement. Both employee-employer information and fiduciary board relationships are tracked in individual-to-organization relationships. This information often serves as the basis for marketing content and stories about the impact the university system has on local communities, the state, and the world (total number of female CEO alumnae running Fortune 500 companies, total number of alumni teaching in the Chicago Public Schools, alumni on every major medical foundation board, etc.) and can provide the data necessary for targeted marketing ("to be seen by my alumni, where in the city of Chicago should I put these Illinois billboards", or "which office buildings have the most UIC alumni employees so I can buy elevator ads", etc.).

Adding an Individual-to-Organization Relationship

To add an Individual-to-organization relationship to a record first, make sure that a record for both the individual constituent and the organization constituent exist in TED. If one of the records does not already exist, use the New Record Wizard on the Constituents menu to have the missing record created.



If a relationship between the individual and the organization already exists, do not edit the relationship details. To preserve the historical information, end date the relationship that is already in TED and add a new relationship with the updated details and new start date.

If a relationship between the two constituents does not exist, add the relationship.

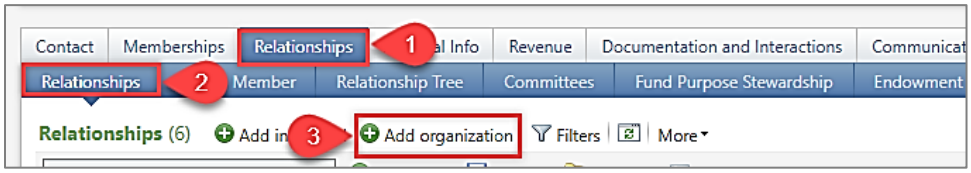
Adding a Non-Employment Relationship

Organization records in TED can contain relationships that link the organization's record to an individual constituent. It is important to add non-employment relationships with an organization if the relationship is significant to the constituent. This can include religious or volunteer organizations.

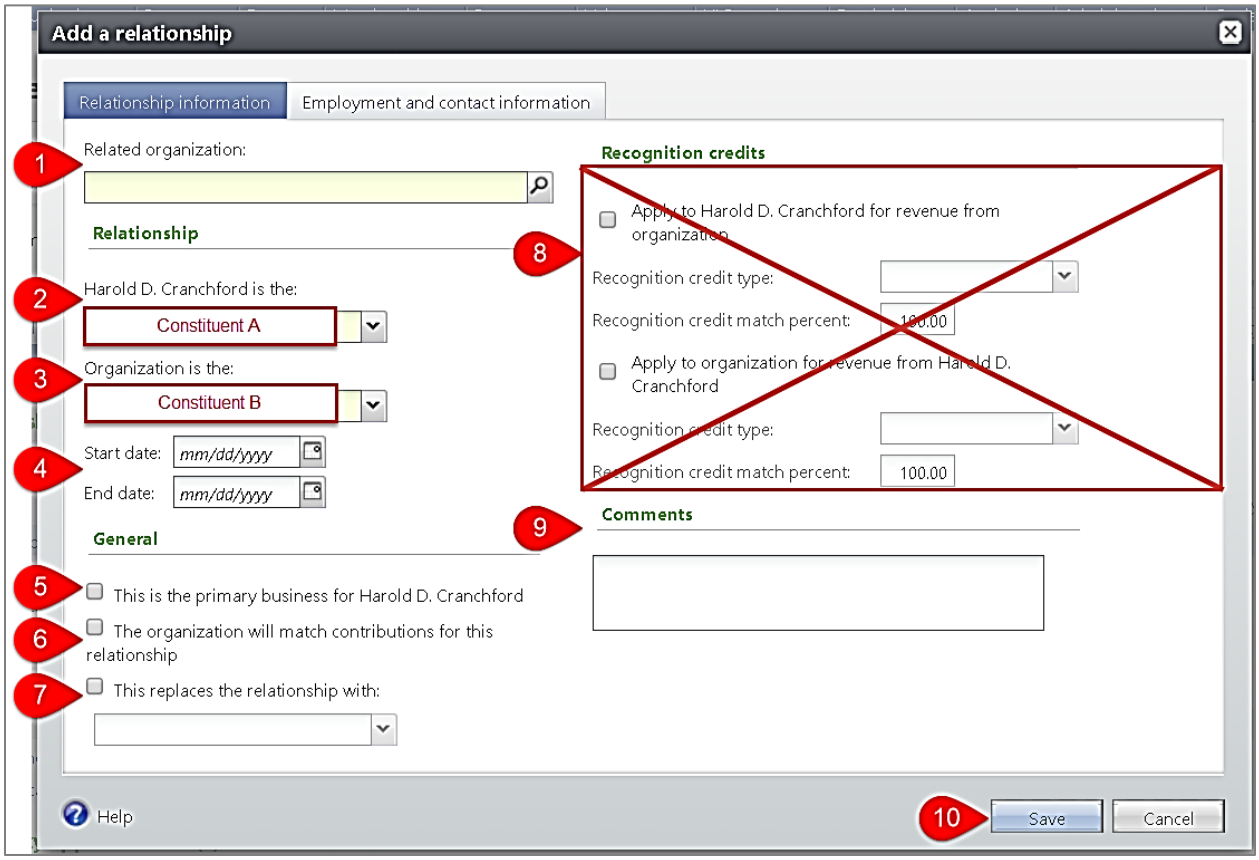
Navigate to the individual record to which the relationship will be added.

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1. Select the **Relationships** tab**.**
2. Click the **Relationships** sub-tab.
3. Select **Add Organization** to open the Add a Relationship window.



1. In the Add a Relationships window, fill in the **Related Individual**.
    a. Type in a name, a search will open if multiple records with that name exist.
    b. Or select the Magnifying Glass to search.
2. In the **Constituent A** field select the appropriate relationship from the drop-down menu.
3. TED will automatically fill in the **Constituent B** field. The relationship can also be selected from the Constituent B is the: drop-down menu to auto-populate the Constituent A is the: field.
4. Fill in the **Start date** and **End dates** as appropriate.
5. Do not check the **This is the primary business for Constituent A** checkbox for a non-employment relationship.
6. Do not check **The organization will match contributions for this relationship**. UIF Gift Administration will check this when the first matching gift is received.

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7. If you check **This replaces the relationship with** and then select the relationship it is replacing from the drop-down menu TED will end date the prior relationship. This is unnecessary for a nonemployment relationship.
8. Do not make any changes in the **Recognition Credits** area. If this needs to be adjusted, please contact UIF Gift Administration.
9. Fill in any **Comment**s as appropriate. Include the Information source, or the how and where you received the employment/ organization relationship information.
10. Click **Save**.

It is important to preserve the history of someone's relationships. End date the relationship when it has ended. If there is a change in the relationship, edit the relationship by end dating the relationship that was there and add any new information as a new entry.

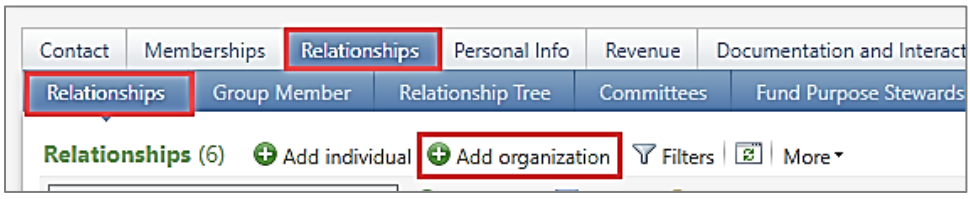
Adding an Employment Relationship

Employment relationships in TED link the organization's record to the individual constituent records of the organization's employees. When adding the employment relationships details can be added that define employee job title, career level and more. It is also possible to link employees as company contacts so that his/her contact information is updated when the company's contact information is updated. Below are the details of how this relationship information works and how to edit the data when necessary.

It is important to note a constituent can only have 1 job at a time with an organization. A constituent can have overlapping employment dates with multiple organizations but not within the same organization. Employment dates cannot overlap within a single organization. Use appropriate start and end dates to add multiple employee/employer relationships to the same organization.

Relationships may be added from either the organization or the individual constituent's record. Begin by accessing the **Relationships** sub-tab from the **Relationship** tab on either the individual or organization record.

FROM THE INDIVIDUAL RECORD

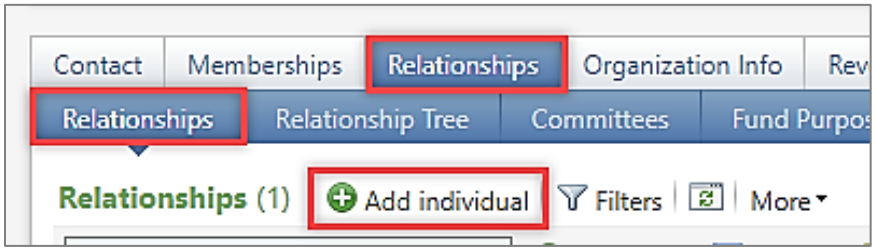


1. Click **Add Organization** to open the **Add a relationship** window.
2. By default, the **Add a relationship** window will open on the **Relationship information** tab.
3. Find the **Related Organization** that will be added to the relationship.
    a. If you type in a name, a search will open if multiple records with that name exist.

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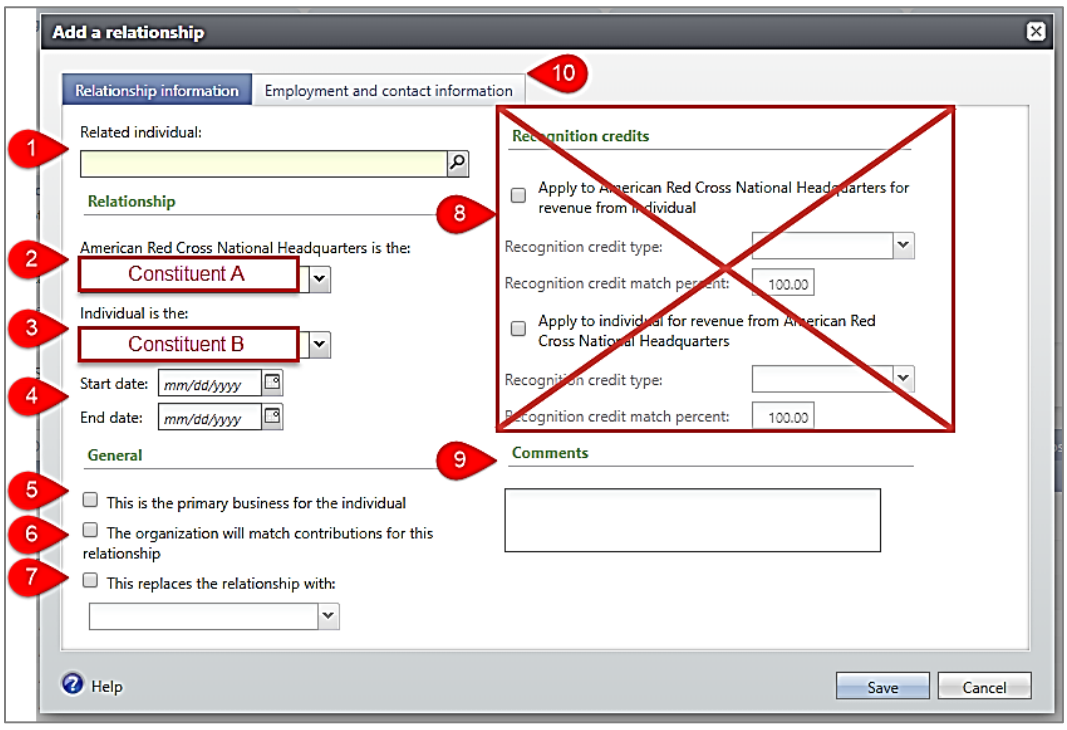
b. You can also click the Magnifying Glass to search.

FROM THE ORGANIZATION RECORD



1. Click **Add individual** to open the **Add a relationship** window.
2. By default, the **Add a relationship** window will open on the **Relationship information** tab.
3. Find the **individual** that will be added to the relationship.
    c. If you type in a name, a search will open if multiple records with that name exist.
    d. You can also click the Magnifying Glass to search.

COMPLETE THE RELATIONSHIP INFORMATION SECTION

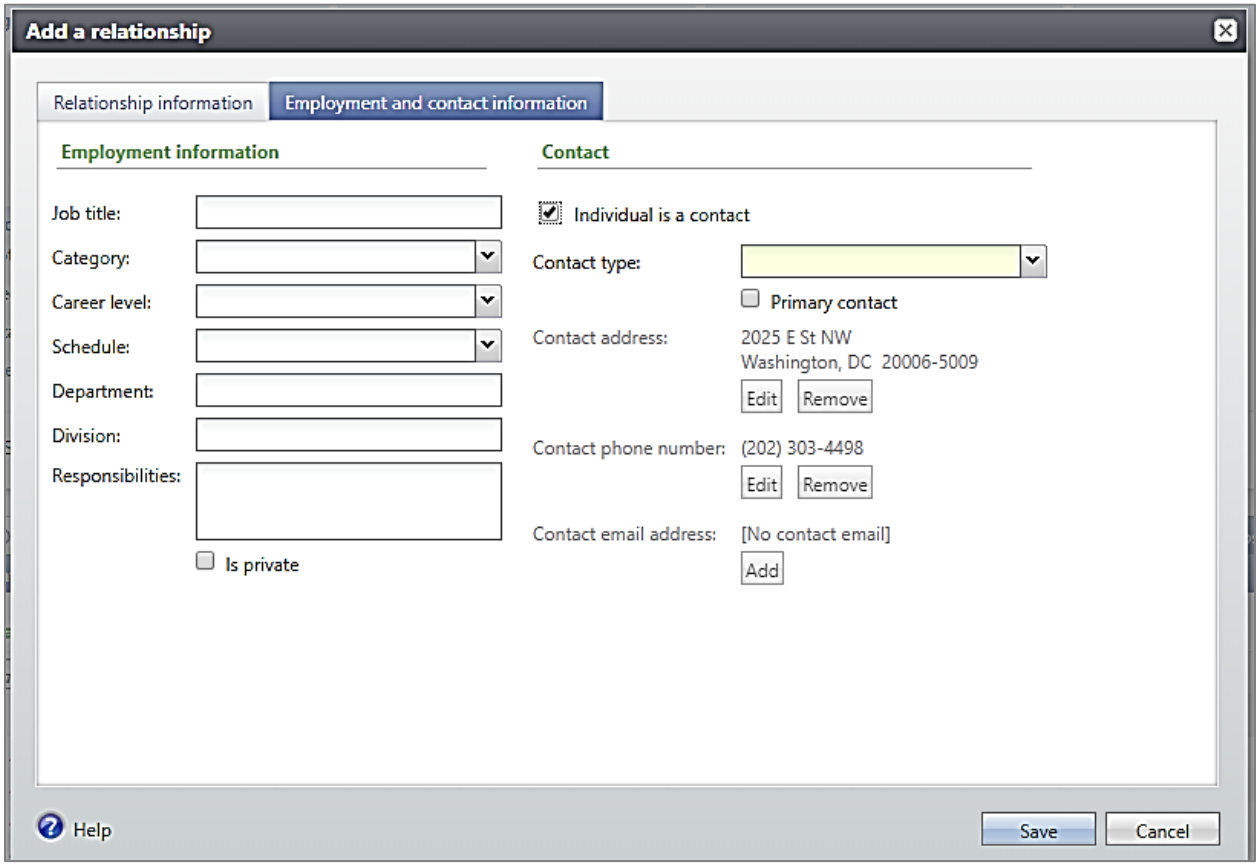


1. In the **Constituent A is the:** field select the appropriate relationship from the drop-down menu.
2. TED will automatically fill in the **Constituent B is the:** field. The relationship can also be selected from the Constituent B is the: drop-down menu to auto-populate the Constituent A is the: field.

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3. Fill in the **Start date** as either the day the constituent began with the organization or the day the employment information was found.
4. Fill in the **End date** if appropriate.
5. Check the **This is the primary business for Constituent A** checkbox if this is the primary business relationship for the constituent. An individual can only have one primary business relationship. Marking a constituent's primary business can help with searching and segmentation purposes.
6. Leave **The organization will match contributions for this relationship** option unchecked. UIF Gift Administration will check this when the first matching gift is received.
7. If this relationship will replace a prior relationship, select the **This replaces the relationship with** option. Then select the relationship it is replacing from the drop-down menu. This will end date the prior relationship.
8. Leave the **Recognition credits** section blank. If anything needs to be changed in this section, contact UIF Gift Administration directly**.**
9. Fill in any **Comment**s as appropriate. Include the Information source, or the how and where you received the employment/ organization relationship information.
10. If this is an employment relationship, or if the constituent is a contact for the organization, select the **Employment and contact information** tab to complete adding the relationship.

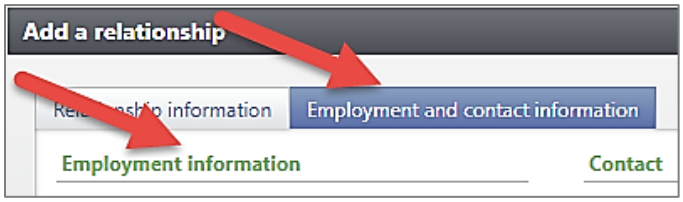
EMPLOYMENT AND CONTACT INFORMATION TAB



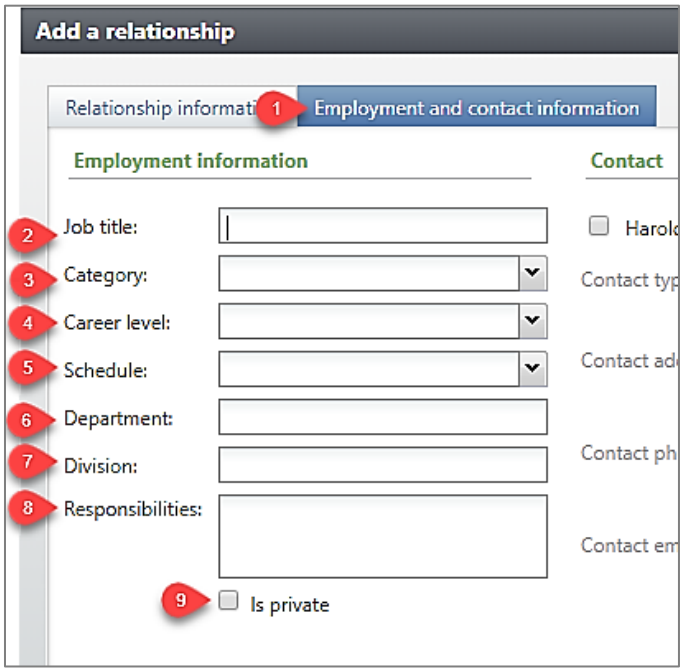
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Employment information

To ensure that employment information surfaces correctly on the **Contact tab** and the **Relationships tab**, specifically in the **Employment history** section, add employment information when you add the relationship between the organization and the individual.



1. Select the **Employment and contact information** tab in the Add a relationship window.



2. Add the **Job title**. Enter the employee's complete job title (i.e. Chief Executive Officer instead of CEO). It is important to note that employment information added to the record without a title will not surface correctly in the employment history section of the tab.

3. Choose a job **Category** from the choices based on the Bureau of Labor Statics job categories. The Standard Occupational Classification (SOC) system is a product of the US Department of Labor's Bureau of Labor Statistics and classifies workers by occupational category. The last code revision occurred in 2010, with the next one slated for 2018. When used effectively in TED, the SOC codes provide additional options for identifying and prioritizing prospects. For example, filling out the Job category field with the appropriate SOC code makes it easier to identify pools of possible high net-worth individuals and other prospects who may not be accurately rated.

4. The **Career level** drop-down box will give you the choice to label this job as Executive or unknown. The UIF Research and Portfolio Management team use specific ad-hoc queries that will populate the Career level field within the Employment History, as Executive, for jobs deemed to be at an Executive level. It is important to identify both the constituent's career level and Job title when adding employment relationships.

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5. If the constituent is anything other than a full-time employee add the appropriate **Schedule** from the drop-down; part-time, retired, or temporary.

6. You may choose to enter a **Department** name for the employee if known. The Department and Division fields often work hand in hand. For instance, the division and department fields may be used for employees of colleges and universities. For example, Prof. Brian Dolber (10673522) is a professor of communication at California State University, San Marcos. Prof. Dolber's college (Humanities, Arts, Behavioral and Social Sciences) can be entered in the division field, while his department (Communication) goes in the department field.

7. You may choose to enter a **Division** name for the employee if known. Another example: Mr. Stuart "Stu" Levenick (11449222) retired from Caterpillar, Inc. in 2014. Mr. Levenick held several positions during his long career with Caterpillar, including executive positions with a variety of Caterpillar divisions. His last position was as the Group President of the Customer and Dealer Support Division. All of these facets of Mr. Levenick's employment history – his executive status, job category, career level, schedule, and division – can be tracked accordingly in this field. Again, it is not necessary to create a new organization record for the Caterpillar Customer and Dealer Support Division. In Mr. Levenick's case, his employment is tied to the primary organization record, with the division noted in the corresponding field.

8. You may choose to enter job **Responsibilities** for the employee if known. The responsibilities field is only used in exceptional circumstances when the nature of the prospect's employment is not sufficiently captured in the other fields of the employment history section. For example, Mr. Mark Steinberg (11326127) is a Partner with Excel Sports Management in its Professional Golf Division. None of these fields reflect a significant aspect of Mr. Steinberg's employment: that he is Tiger Woods' manager. The responsibilities field can be used to enter important information like this. While it is also possible to use the comments box in the employer relationship field, this information will only surface by clicking the double arrows. Information entered in the responsibilities field will surface clearly alongside other fields entered in the employment history.

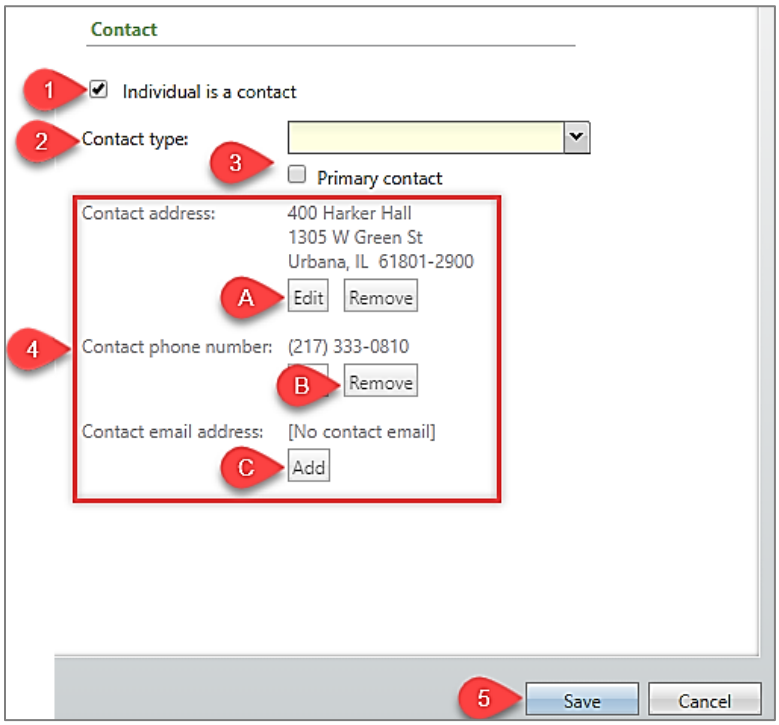
**A constituent's current area of focus, specialty, or residency should not be added to the Responsibilities field. This information is added to the Specialties section of the Personal Information tab. **

9. While all information in TED is confidential, marking a relationship as **Is Private** further indicates the information should be kept confidential. Selecting this option does not keep the information from surfacing in ad-hoc list requests, mass communications, or segmentation.

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Employment Contact information



1. The **Individual is a contact** checkbox works in conjunction with the **Contact type** field in two ways. First, when the constituent is marked as a contact, all contact information below is automatically added to the Individual constituent's Contact tab as a business contact type. Secondly, it automates the updating of this employee's contact data in the future if the organization changes contact data.

*** As long as the business address on both the individual's contact tab and the organization's contact tab match, any changes made to the business address from the organization's record, will automatically update the business address on the individual's contact tab. ***

2. Select the **Contact type** from the available drop down. This will indicate the type of contact the individual is for the related organization. Choose **Employee** if he/she works at this organization location. If the physical location of where he/she works is unknown, mark the contact type as **Unknown Location**.

3. Marking a constituent as a **Primary Contact** will replace any other individual constituent that was previously marked as the main contact, or primary contact, for that organization. The primary contact displays in the Contacts Summary tile with a green checkmark next to that person's name. It also displays on the **Relationship** tab in the **Type** column indicating the constituent as the Primary contact. There can only be one primary contact per organization record.

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4. **Contact Data Area** – You can choose to add, edit, or remove the address, phone, or email contact data for this employee. The contact data is automatically populated with the organization's contact information.

    a. The **Edit** option allows a user to edit the current field. Editing this information will not update information on the organization record.

    b. The **Remove** option allows a user to remove the information currently in the field. Editing this information will not update information on the organization record.

    c. The **Add** option is available if the organization record has no relevant information associated with the contact field.

** If the address, phone, or email contact information is changed, it will no longer match the organization's contact data. If in the future the organization's data changes, it will no longer automatically flow over to the individual's business address.

For this reason, is it important to update the Contact phone number and the Contact email address with the constituent's direct business information as this will not be overwritten if the organization's generic phone number or generic email address is changed. **

5. Click **Save** to save your changes.

Organization Not Known

In some cases, a constituent's job title may be known, but not the organization where he/she works. There is no need to create a new organization record. In this case, employment should be tied to the Organization Not Known (13440291) record. For example, Mr. John Bagby (10425348) previously worked as a property manager for an unknown company. Fill in as much known information as possible in the employment history field, just as you would for any other employee/employer relationship. In Mr. Bagby's case, we know his job title, the corresponding job category, and that he is retired.

Self-Employed

In cases where a constituent's job title is known and he/she is not employed by an organization, use the Self-Employed (13607392) record. For example, Mrs. Susan Langan (10538747) previously worked as a Freelance Writer and Film Producer and was not affiliated with any production company. Another example can be found on the record of Mr. David Hartweg (11442910). We know that Mr. Hartweg is a self-employed farmer, so his employment belongs on the Self-Employed record.

** The Organization Not Known and Self-Employed records have at times been used interchangeably, and the Research and Portfolio Management team is aware that further cleanup is needed. If you notice that a constituent has an employment relationship that belongs on the Organization Not Known record but has been incorrectly entered on the Self-Employed record (or vice versa), and you are unable to make the edits yourself, please submit a Research Request to have the employment relationship corrected. **

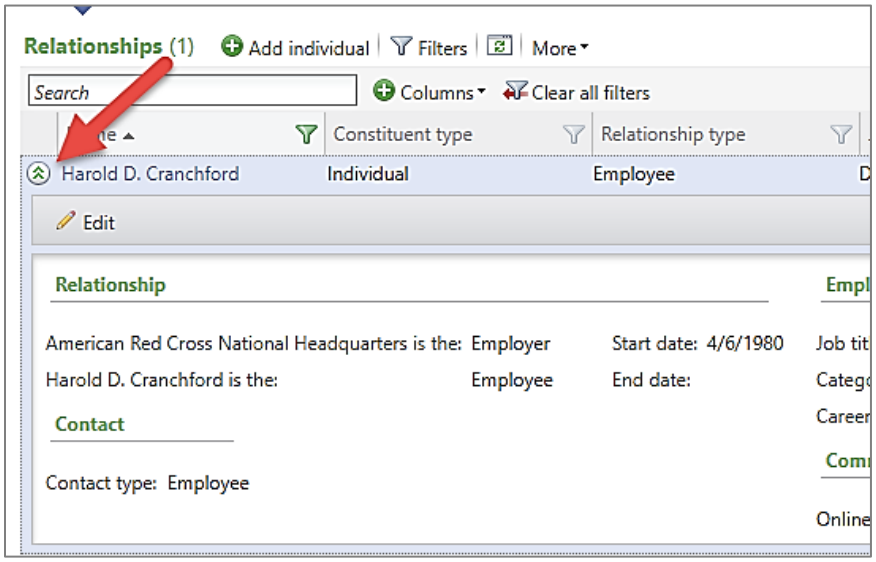
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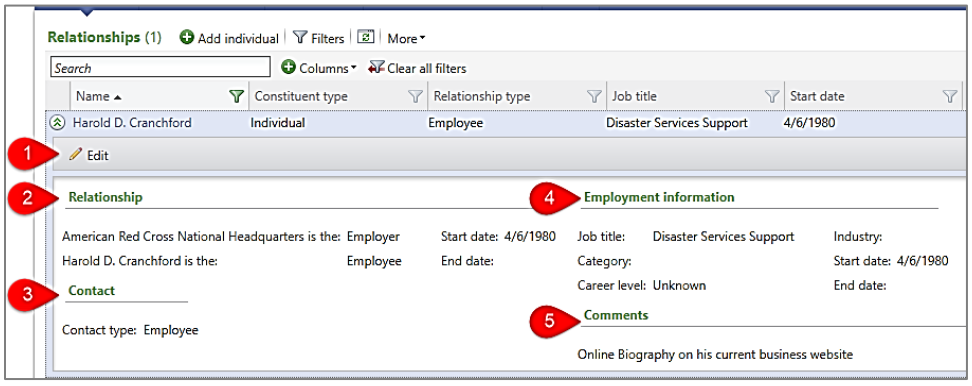
Editing an Organization Relationship

There are two ways to edit an organization relationship depending on the type of edit. If you are editing the relationship to end the non-employment relationship, edit the relationship from the Relationships section. If you are editing the relationship to update information such as job title/employment position or to end an employment relationship, see the Adding and Editing Employment Titles under the Employment history section.

Expanding an Organization Relationship



1. Navigate to the Relationship tab on either the individual or the organization record.
2. Select the **double arrows** to the left of the organization name. This expands the relationship to allow the user to see additional details about the relationship.

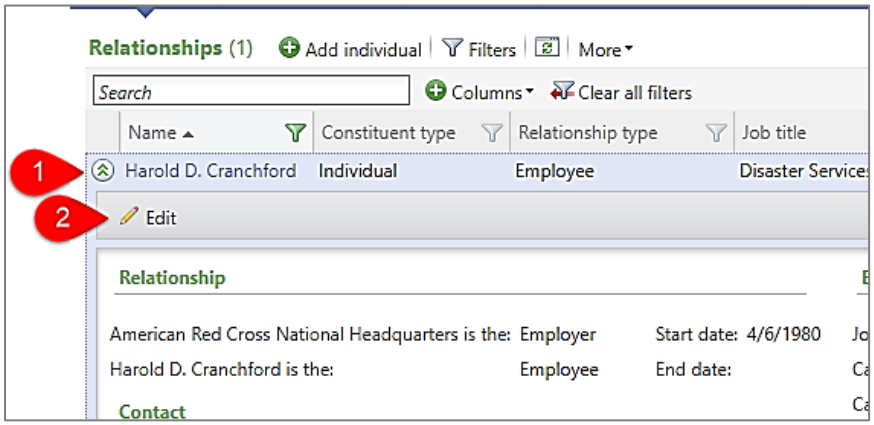


1. The **Edit** option opens a new window from which the relationship can be edited.
2. The **Relationship** section identifies the type of relationship held between the two constituents.
3. If the constituent is a contact for the organization, it will show the contact type under the **Contact** section.

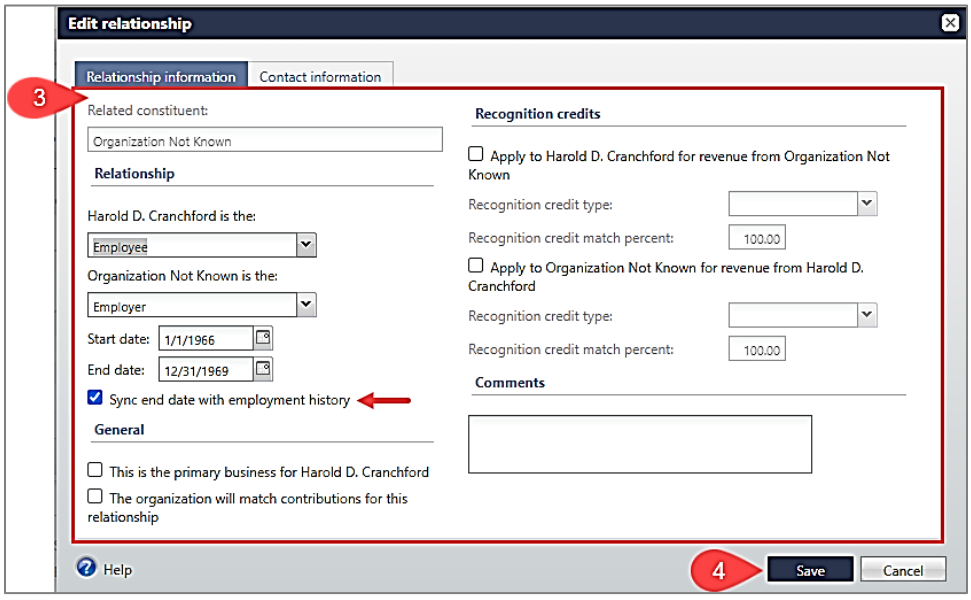
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4. The **Employment information** section details any added information regarding the position the constituent holds with the organization, the type of responsibilities the constituent has, as well as the industry associated with the organization.
5. The **Comments** section will show any additional details that have been added to the relationship. Comments should include the Information Source, or the where and how, the relationship information was found.

Editing an Organization Relationship



1. Expand the relationship that will be edited by selecting the **double arrows** to the left of the organization name.
2. Select **Edit**.



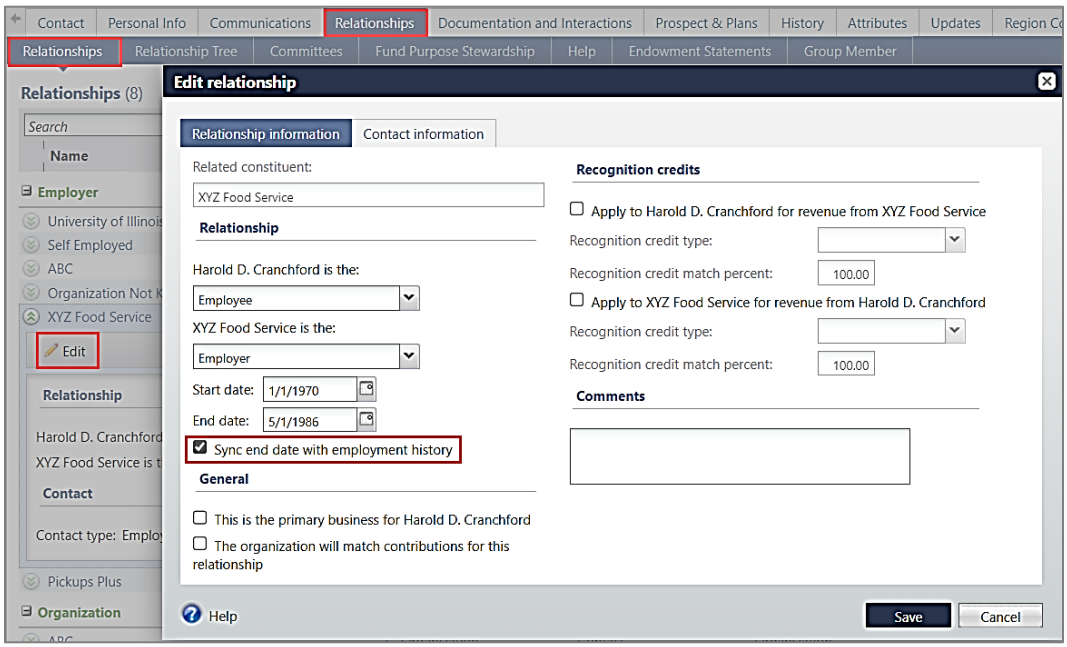
3. Edit any appropriate information.
4. Select **Save.**

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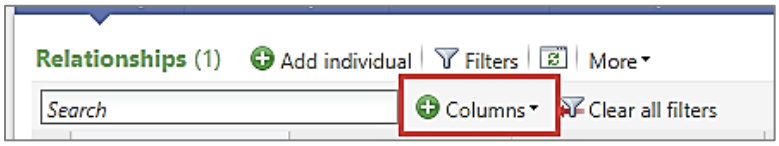
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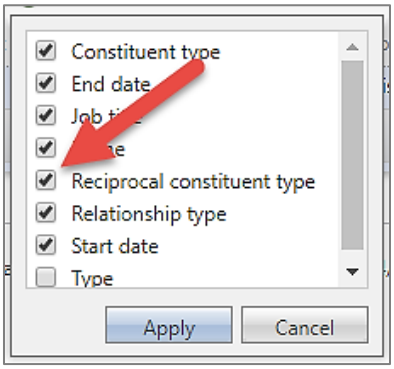
Employment Relationship and Employment History end dates can be updated automatically when one of them is changed.

When editing an existing employment relationship, you can select to automatically update the corresponding employment history end date automatically by checking the “Sync end date with employment history” box.



If the Edit option does not appear on the expanded relationship, review the available columns through the **Columns** option. Reciprocal constituent type should be a selected column to ensure the edit option is available.





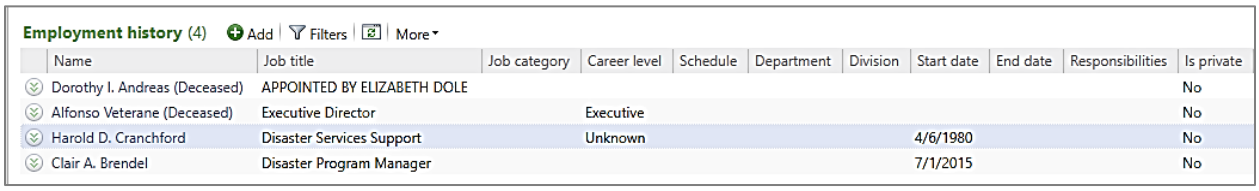
If an employment relationship is ending, the relationship must be end-dated in both the Relationships section as well as the Employment history section to make the relationship historical

Employment History Section

The **Employment History** section identifies constituent’s current and former employment information. Employment history will update automatically when the organization relationship is created using the Employment and Contact tab on the Add a Relationship window.

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When a constituent is promoted or receives a new job title at the same organization, it does not change the organization relationship; however, it does change the constituent's employment history. To preserve our constituent's historical employment information the job title should not be edited. It should be end-dated and a new job title added to the record. This is all done in the Employment history section on the Relationships tab.

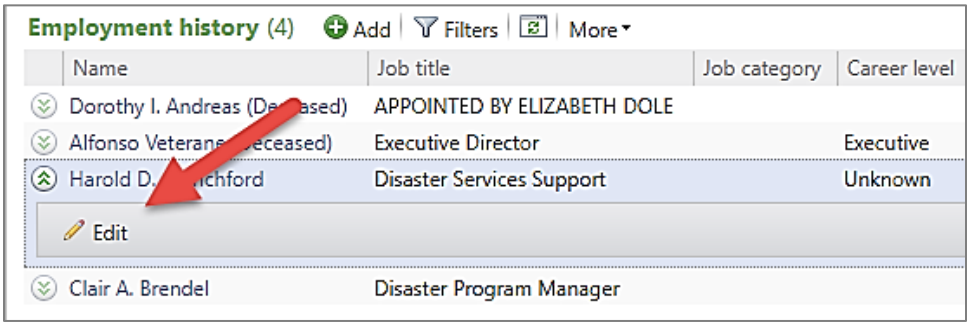


Adding and Editing Job Titles

Employment titles can be updated or added from either the Individual or the Organization record.

Editing a Job Title

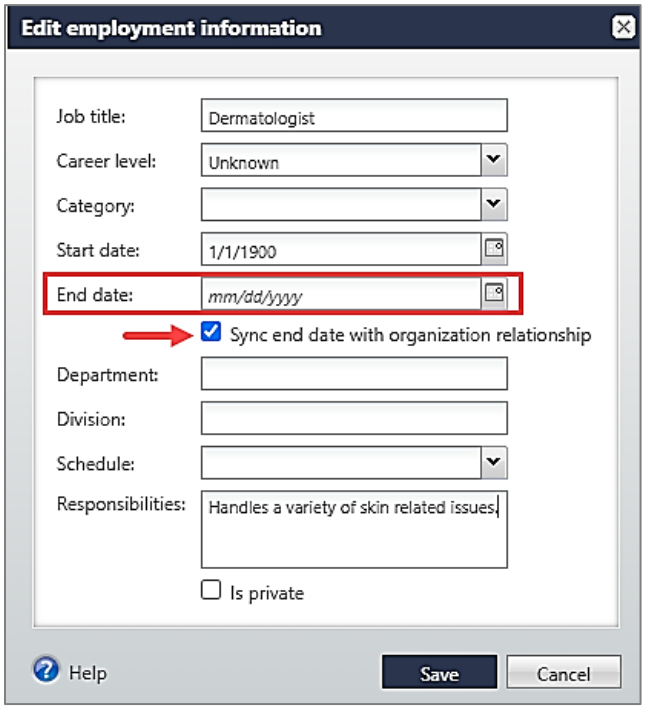
1. Expand the individual employment history by selecting the double arrow icon to the left of the job title that will be end-dated. This will expose the **Edit** button.



2. Click the **Edit** button to open the **Edit employment information** window.

**The available fields in the Edit employment information window are the same as those from the Individual Employment Information section of the Add a relationship window. **

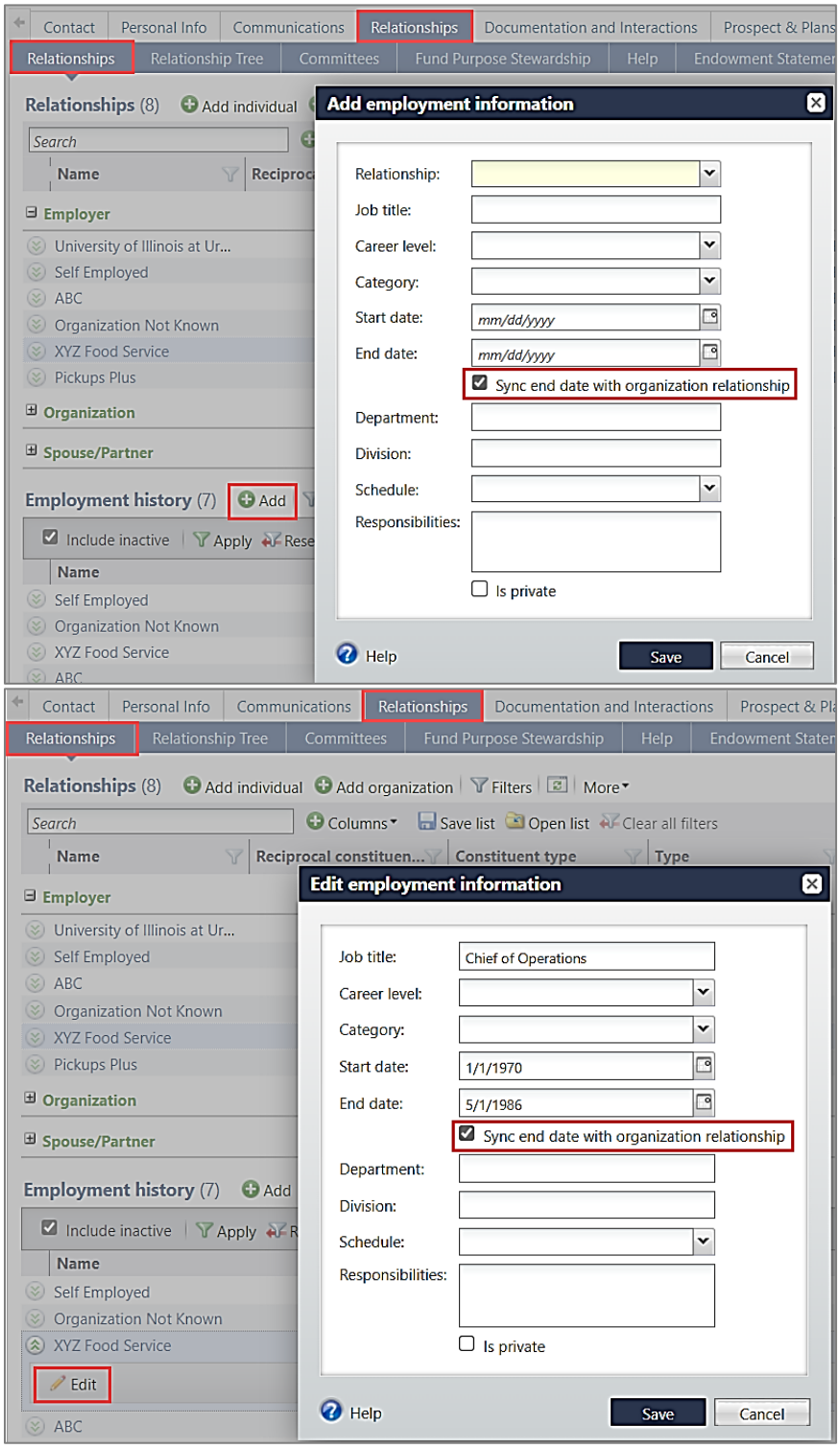
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3. Add the **End date.**
4. Select **Save.**

You can select to automatically update the corresponding employment relationship end date by clicking the “Sync end date with organization relationship” box within the Add or Edit employment information window from the Employment History section.

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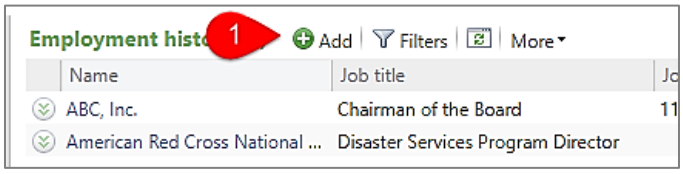


Note: For organization relationships that have more than one position, the sync end date option will only appear for the most recent position, not ones prior to that.

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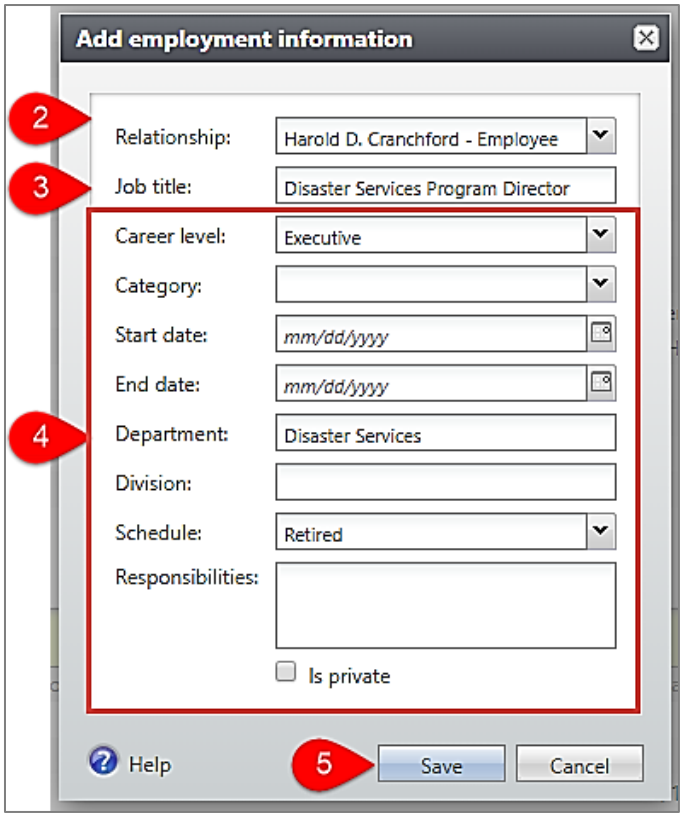
Adding a New Job Title

1. Select **Add** in the **Employment history** section to open a new **Add employment information** window.



The available fields in the **Add employment information window are the same as those in the **Individual Employment Information** section of the **Add a relationship** window. **

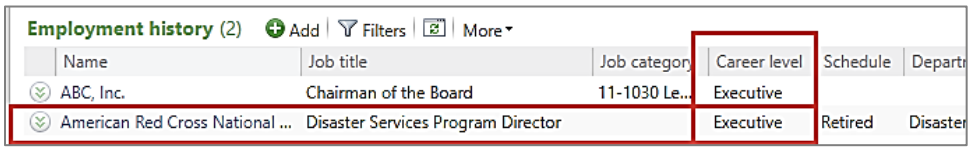
2. From the **Relationships** drop-down list, select the name of the organization.
3. Add the new **Job title**.
4. Update the employment information with any new details associated with the new position.
5. Select **Save.**



Career Level Identification: Executive

To ensure that constituent career level is correctly identified in the TED system UIF Research and Portfolio Management (RPM) will create, maintain, and retool as needed, TED ad-hoc queries that will populate the Career level field within the Employment History, as Executive, for jobs deemed to be at an Executive level.

Job Title



The Job title will be the main identifier to determine an Executive Career level, using wildcard matching on job title naming conventions and acronyms. Additional employment-based identifiers, such as job category, may also play a factor. All Employee/Employer relationships will be considered whether the employment is active or inactive.

A weekly global change process will wipe all Career levels indicated as Executive, then refresh with the newest and latest Executive Career level logic contained within the aforementioned TED ad-hoc queries.

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Types of Executive Career Level Employment: C-Suite level executives, Senior Management, Owners, Founders, Top Government officials, etc.

**UIF RPM is aware and understands that some Executive level employment may not fall under the above-mentioned classification. **

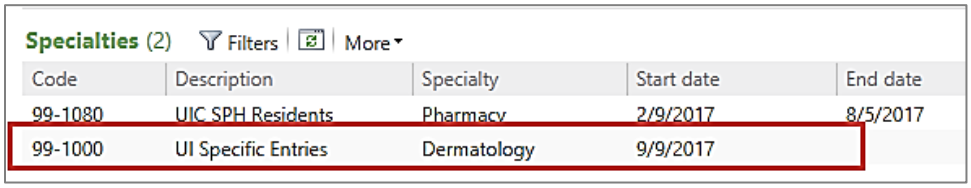
Specialties

When a constituent has a residency with any of the University of Illinois schools or colleges, the residency appointment is added to the record under University Appointments via a Banner update. The information held in this entry does not always identify the constituent's area of practice during his/her residency. Information on the constituent's area of practice during residency is gathered on the constituent's individual record, on the Personal Info tab under the Personal sub-tab in the Specialties section.

After graduation, the constituent may have a specific area of practice beyond what was studied while attending any of the University of Illinois schools. For example, a constituent may have been a pharmacy resident but is now practicing dermatology. Information on the constituent's current area of practice is gathered on the constituent's individual record, on the Personal Info tab under the Personal sub-tab in the Specialties section.

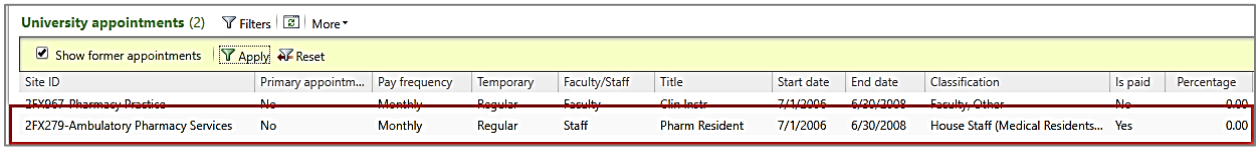
Currently only two areas are making use of the Specialties section in TED: Health Sciences and Law. Additional areas may request the use of this area by submitting a request through the UIF IT Services Portal.

Current Area of Practice



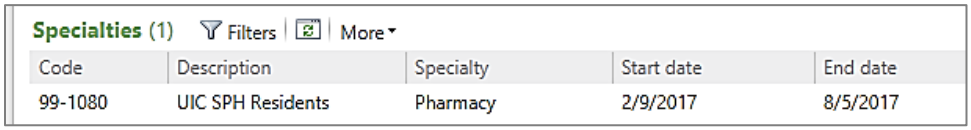
To identify constituents for segmentation purposes it is important to identify his/her current area of practice. This information cannot be added via an automated system. It must be requested by the user and added manually by the UIF AIMS team.

Residencies



Residencies that are paid through the University of Illinois System are added to the record under University Appointments through a Banner update. This addition to the record does not contain the area of practice associated with the residency.

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Specialties (1) Filters | More

Code	Description	Specialty	Start date	End date
99-1080	UIC SPH Residents	Pharmacy	2/9/2017	8/5/2017

A request for the area of practice associated with the residency to be added to the record in the Specialties section can be made via a Bio Feedback Add request from the Comments tab on the constituent's individual record.

Requesting a Specialty on a Record

To request a residency specialty or current area of practice specialty be added to an individual constituent's record complete a Bio Feedback Add request from the Comment tab on the individual record.

Requesting a New Specialty

To request an additional specialty be added or to request an edit to the current entries in the Specialties area please submit a request through the UIF IT Services Portal.

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ORGANIZATION HIERARCHY

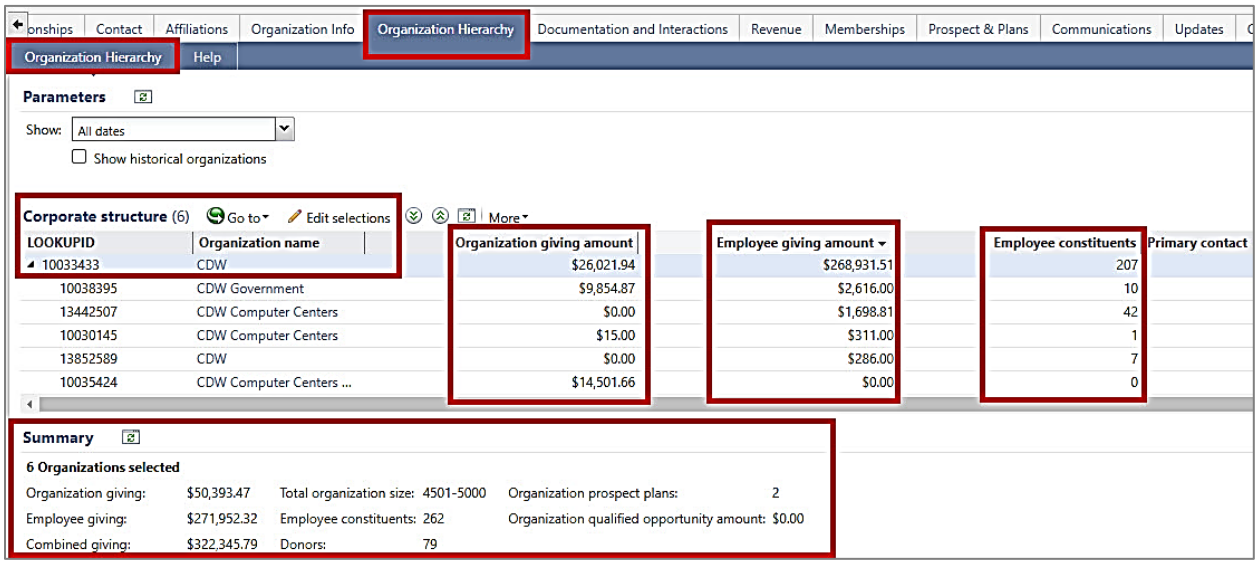
A HIGH-LEVEL OVERVIEW

Identify a Corporate Hierarchy in TED

The organization hierarchy represents a "family" of related organizations in TED. Organization-organization relationships exist in TED to show how these organizations are related, including whether the organization is a "parent" or "child" of the other. Parent-child relationships in the organization hierarchy will ensure revenue associated with each entity will be included in the hierarchy's total.

Where can I find the Organization Hierarchy in TED?

The organization hierarchy is visually represented in the Organization Hierarchy tab. This tab only appears on organization records.



If you click on the Organization Hierarchy tab, you will see all organizations included in the hierarchy. Only organizations with a parent-child relationship will appear in the hierarchy. **The organization at the top of the Corporate structure is the "Primary."** With the exception of the Primary at the top, the order of the organizations is random.

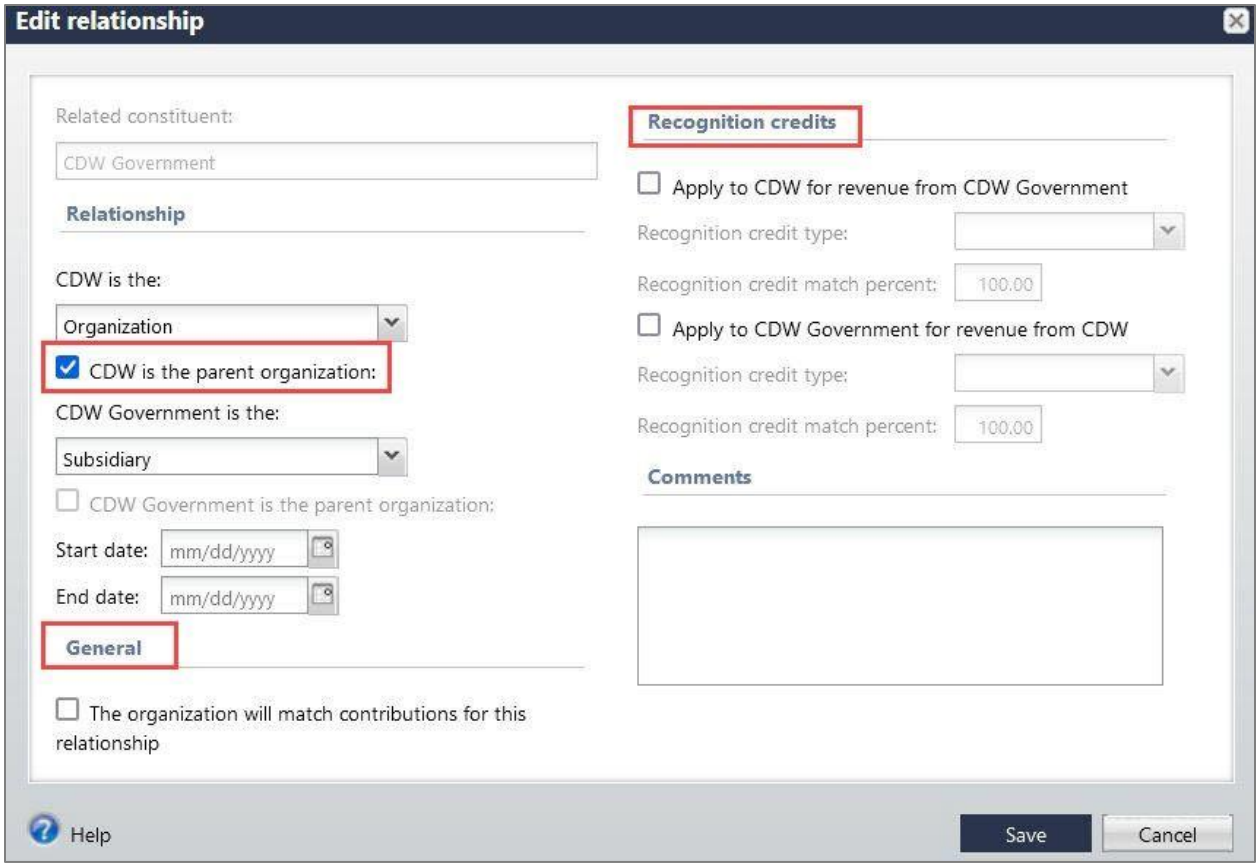
The Organization Hierarchy tab also displays revenue associated with each entity, employee giving associated with each entity, and the number of employee constituents. Totals will display at the bottom in the Summary section. **While these totals may be useful for informal estimates, any official totals should be submitted as a request to the AI team**.

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Parent-child relationships

When we want revenue from any associated entity to be included in the corporate hierarchy total, we need to create parent-child relationships between organizations.



When creating new org-org relationships, selecting certain relationship types will automatically trigger the selection of the "is a parent organization" box. For example, if you select "Subsidiary," the related entity will automatically become "Organization," and the Organization will be automatically designated as the parent. The same automatic parent-child relationship will occur if the "Foundation" or "Matching Gift Program" relationship types are selected.

Not all relationships need to be parent-child. For example, the Associated Company relationship type exists when there is a need to show organizations have some association with one another, but their revenue should remain separate. In this case, the entity with the Associated Company relationship would not appear in the other organization's hierarchy, as long as the "is the parent organization" remains unselected.

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As with creating individual-org relationships, note that in org-org relationships that RPM will not select any revenue-related options in the relationship screen.

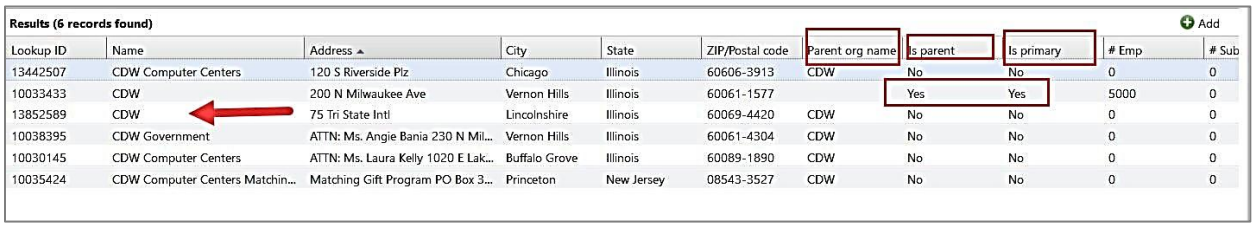
Organization hierarchies in TED vs other representations

TED is not the only instance where you may see a corporate hierarchy. Some of the corporate research tools that RPM users, such as Nexis Dossier or D&B Hoover's, also manage visual representations of corporate family trees. While RPM, in cooperation with other advancement units, strives to represent these relationships accurately, the TED corporate hierarchies are not meant to be a faithful reproduction of a full corporate hierarchy.

The RPM Org Records Working Group has an ongoing project to simplify organization hierarchies in TED. We continue to identify duplicate or otherwise superfluous records in TED that can either be merged into existing records or deleted. The aim of this project is to reduce the number of organization records in a single hierarchy, which will make working with organization records less confusing for end users. **For example, we no longer seek to add branch locations as distinct organization records.** True subsidiary organizations will continue to be added provided they meet record creation standards.

Other ways of interpreting the organization hierarchy in TED

While the Organization Hierarchy tab is the most accessible way to visualize the corporate hierarchy in TED, some details about these relationships can also be gleaned from the Organization Search screen. Whether the organization is a primary (top of the hierarchy), parent (has a child relationship), and the name of its parent are indicated in the results of the Organization Search screen.



Results (6 records found) Add

Lookup ID	Name	Address	City	State	ZIP/Postal code	Parent org name	Is parent	Is primary	# Emp	# Sub
13442507	CDW Computer Centers	120 S Riverside Plz	Chicago	Illinois	60606-3913	CDW	No	No	0	0
10033433	CDW	200 N Milwaukee Ave	Vernon Hills	Illinois	60061-1577		Yes	Yes	5000	0
13852589	CDW	75 Tri State Intl	Lincolnshire	Illinois	60069-4420	CDW	No	No	0	0
10038395	CDW Government	ATTN: Ms. Angie Bania 230 N Mil...	Vernon Hills	Illinois	60061-4304	CDW	No	No	0	0
10030145	CDW Computer Centers	ATTN: Ms. Laura Kelly 1020 E Lak...	Buffalo Grove	Illinois	60089-1890	CDW	No	No	0	0
10035424	CDW Computer Centers Matchin...	Matching Gift Program PO Box 3...	Princeton	New Jersey	08543-3527	CDW	No	No	0	0

For example, if you are uncertain about which record to work with, a good rule of thumb is to use the Primary. Understanding how the corporate hierarchy is organized will help you determine the primary with confidence.

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The corporate hierarchy is also useful for determining on which record a plan should be added. **According to UIF standards, plans should always be added to the primary in the hierarchy, and any other organizations should be added as a Plan Participant**. For example, if a gift officer is working with Merrill Lynch, the plan should be added to the primary record (Bank of America) and the main Merrill Lynch record would be added as a plan participant. The main record will be the record that represents the headquarters of a location.

Updated 10/7/24

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ORGANIZATION-TO-ORGANIZATION RELATIONSHIPS

UNDERSTANDING ORGANIZATION RELATIONSHIPS IN TED

Clean organization information is critical for maximizing the effectiveness of prospect research on individuals and organizations. At the most basic level, it provides business contact information and tells us where our prospects work and the type of work done. When organization and employment information is clean and comprehensive, it allows end users more options for creating customized prospect pools.

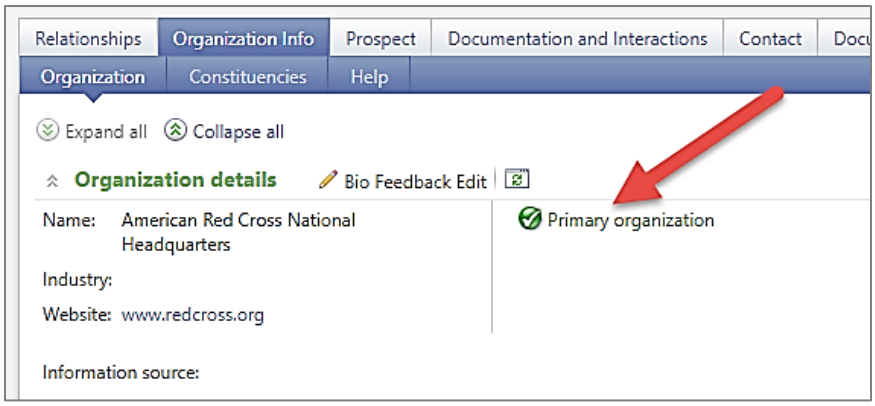
This document specifically details organization-to-organization relationships. Information on employment relationships can be found in the Individual-to-organization relationship documentation.

Understanding Parent and Primary records

An organization hierarchy in the TED system is comprised of Primary and Parent organizations.

Primary

A Primary organization is the main headquarters or office of operations for the organization. The Primary organization record should house all plans for the organization. Additional branches, offices, or subsidiary organizations can be added to the plan as plan participants. Primary records are often parent records as well.

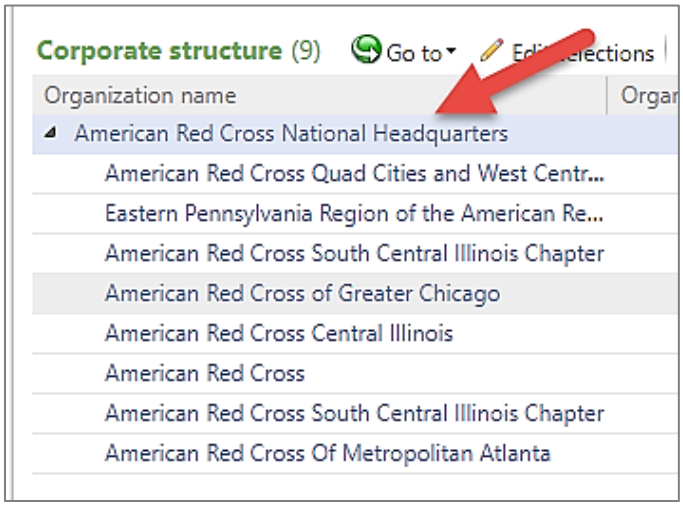


The UIF Research and Portfolio Management team is in the process of adding corporate logos to all Primary records, or a generic “primary organization record” image when no corporate logo is available. The image will be an excellent indicator, along with the Primary Organization checkmark, that the record is the primary record for the organization.

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Parent

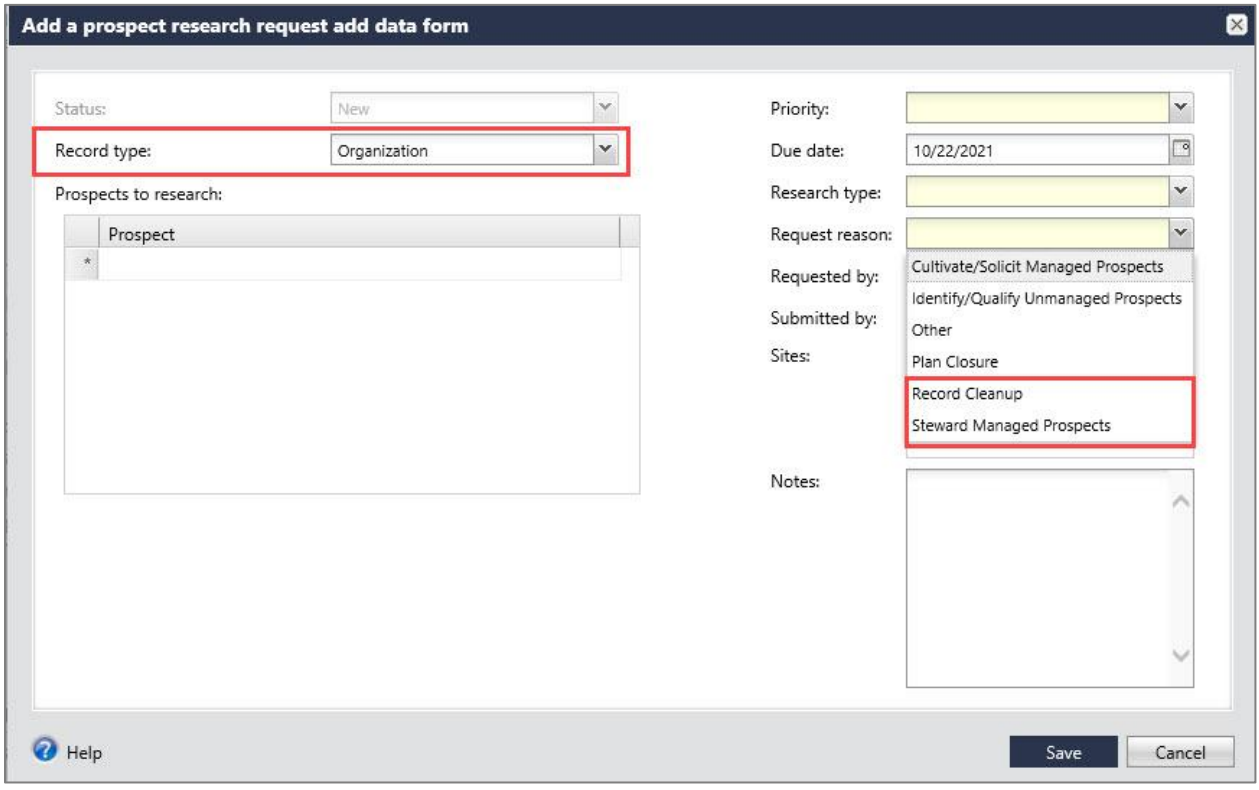
A Parent organization is any organization in TED that has been linked to a subsidiary organization through a relationship. A Parent record can also be the Primary record for the organization, though not always.



Requesting an Organization-to-Organization Relationship

Research Requests are submitted when an organization needs a corporate record cleanup, to steward managed prospects, to request that two organization records be merged, or to request a relationship between two organization records.

Research Requests can be found in the Prospects menu and on the Prospect Summary sub-tab of the Prospect tab. If a user does not have access to Research Requests, requests to create an organization-to-organization request can be submitted via the Bio Feedback Add request on the Comments tab on a constituent's record.



When requesting the creation of an organization-to-organization relationship include the following information in the request:

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- Name and ID of each organization.
- Identify if this is a parent/subsidiary relationship.
- Clearly identify which organization's record is the parent and which the subsidiary.

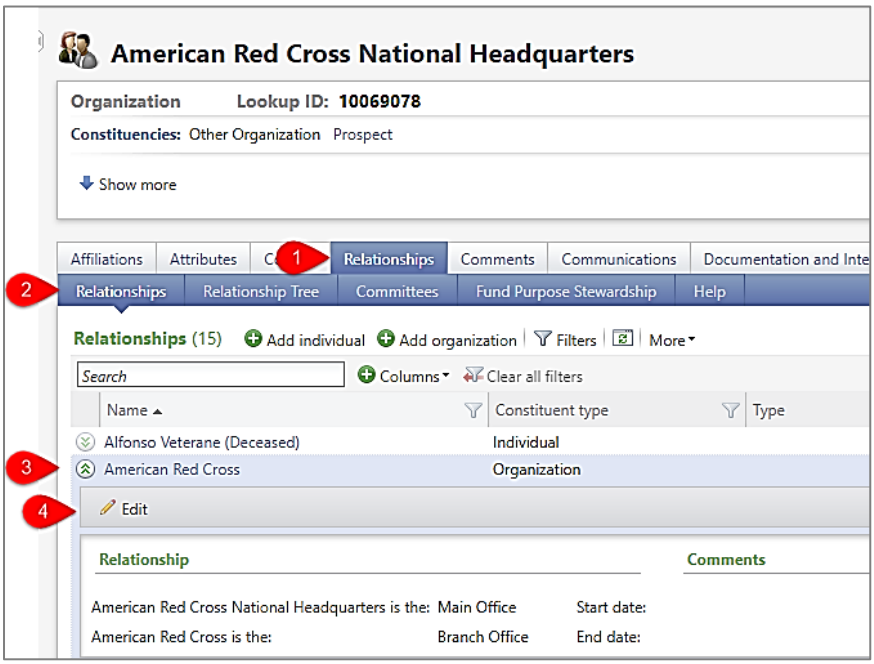
Additional information on how to complete a Research Request can be found in the TED User Guide under Research Request.

Editing an Organization-to-Organization Relationship

Organization-to-organization relationships can change over time. When the relationship changes it is important to document the change in TED. Changes to organization-to-organization type relationships are not common. Most often, the change is because the relationship has ended. When this happens, it is important to end date the relationship.

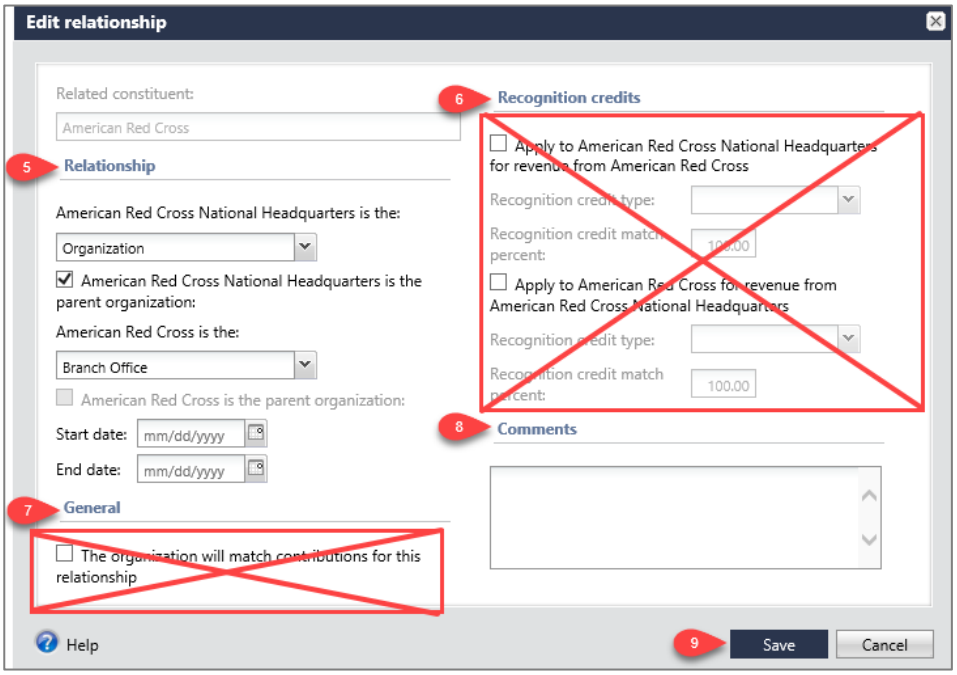
To edit an organization-to-organization relationship begin on either organization record.

1. Select the **Relationships** tab
2. Select the **Relationships** sub-tab
3. Select the **double arrows** to the left of the organization name in Relationships section to expand the relationship.
4. Select **Edit** to open the **Edit Relationship** window.



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5. Update any information in the **Relationship** section of the window as needed.
6. Do not make any changes to the **Recognition credits** section.
7. Do not make any changes to the **General** section.



8. Add any appropriate comments in the **Comments** field.
9. Select **Save**.

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RELATIONSHIPS TABLE VALUES & DEFINITIONS

AN OVERVIEW OF TED RELATIONSHIPS

The information contained in relationships, in all its iterations, allows the University to further refine approaches to outreach, engagement, and prospecting. This data is key to developing and maintaining a targeted and impactful advancement program.

Table Values and Definitions

All relationship types have a corresponding type (reciprocal relationship). Once the appropriate relationship type has been selected for one constituent the corresponding type will auto-fill for the other selected constituent. Below are several tables identifying active relationship type pairs in the TED system:

Individual to Individual

Relationship	Corresponding Type	Definition
Familial Relationships		
Familial relationships indicate how individuals in the system are biologically or legally related to one another. Like all relationships in TED, knowledge of familial relationships can provide entry for Advancement officers, faculty, or staff to expand and strengthen relationships with a larger network that may extend beyond the University of Illinois System. In addition to providing potential leverage to assist in introductions or closing of gifts, familial relationships can be used to identify legacy families (when multiple and/or continued generations of family members have attended the University) whose legacy status may indicate a greater affinity for the University. Legacy families may also identify a group of individuals who belong in coordinated management. Familial relationships can indicate opportunities for soliciting honorary gifts, where one or more family members may have a stronger interest in giving to the University in order to honor one or more family members who have an affinity for the University.		
Spouse/Partner	Spouse Partner	**Spouse/Partner:** One of two individuals connected by marriage or formalized partnership which may or may not be legally recognized. *Additional gift recognition credit occurs when this relationship exists. Start and end dates are used to indicate status of relationship; couples that have dissolved their relationships will have appropriate end dates indicating the relationship is former.*

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Relationship	Corresponding Type	Definition
Familial Relationships (Continued)		
Parent	Child	**Parent:** The natural or legal guardian of a child. **Child:** A person who is the son or daughter of a natural or legal guardian. *Only children over the age of 18 may be added to TED unless 1) they are enrolled in the University of Illinois Laboratory High School or 2) permission to add those records is provided by the UIF CIO.* *The University of Illinois does not have a formalized parent load for current students in partnership with Admissions. Instead, these relationships are added by an advancement officer or someone with firsthand knowledge of the relationship or through a load at the request of a unit when that unit has a data file of parent information.*
Sibling	Sibling	**Sibling:** One of two or more individuals who share at least one common parent.
Grandparent	Grandchild	**Grandparent**: A parent of one's father or mother. **Grandchild**: The child of one's son or daughter. *There could be instances in TED where we have grandparent information for a child but not have parent information, such as when a grandparent and grandchild attend or work for the University, but the parent has not had any involvement. See context about legacy families and honorees.*
Aunt/Uncle	Niece/Nephew	**Aunt/Uncle**: The sibling of one's father or mother or the wife of one's uncle. **Niece/Nephew**: A child of one's brother or sister, or of one's brother-in-law or sister-in-law.
Cousin	Cousin	**Cousin:** The child of one's aunt or uncle.
In-Law	In-Law	**In-Law:** Individuals who are related by marriage but not married to one another.
Relative	Relative	**Relative:** Individuals who are known to be biologically or legally related to one another. This relationship type should only be used when a more specific relationship type (e.g., Parent-Child, Aunt/Uncle-Niece/Nephew) is unknown.
Step Relative	Step Relative	**Step Relative:** A family relation established through marriage that is neither biological nor legal in nature. Note that a "Step Relative" relationship differs from that of an "In Law".

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Relationship	Corresponding Type	Definition
University-based Relationships		
University-based relationships provide additional context about the educational experience of students beyond degree information and traditional academic involvement. Constituents often maintain lifelong relationships with their instructors or academic advisors. These instructors or advisors, then, may be influencers in developing or executing prospect strategy, and/or could be honorees of gifts by those former students.		
Instructor/Advisor	Student	**Instructor:** A staff or faculty representative assigned or chosen to instruct or provide advice or guidance to an undergraduate or graduate student about his/her course of study and/or thesis or dissertation. **Student**: A person who either currently attends or previously attended the University in pursuit of a degree and/or continuing education credit (i.e., non-degree seeking).
Postdoctoral Supervisor	Postdoctoral Researcher	**Postdoctoral Supervisor**: Staff or faculty member who directly oversees the research and career development of a postdoctoral researcher. **Postdoctoral Researcher:** An individual holding a doctoral degree who is engaged in a temporary program of mentored research and/or scholarly training.
Other Personal or Professional Relationships		
Personal and professional relationships can be used to identify leads for introductions to other prospects and may be added as a result of prospect pool reviews with development board and committees. These relationships can also help to assess both the volume and strength of a constituent's relationship with other University of Illinois constituents. As with familial and University-based relationships, these relationships can indicate opportunities for soliciting honorary gifts, where one or more friends or colleagues may have a stronger interest in giving to the University in order to honor one or more friends or colleagues who have an affinity for the University.		
Friend	Friend	**Friend:** Individuals that are known to have an established and ongoing social relationship but are not otherwise related. *This relationship can be used to identify leads for introductions to other prospects and is often added because of prospect pool reviews with development board and committees. These types of relationships help to assess both the volume and strength of a constituent's relationship with other University of Illinois constituents.*
Colleague	Colleague	**Colleague:** Individuals who are acquainted professionally and are known to work closely with one another.
Mentor	Mentee	**Mentor**: An individual with established credentials or professional experience who guides the growth and development of a protégé. **Mentee**: A protégé seeking training, counseling, or advice from a mentor. *In the University context, this may not be a formalized academic relationship (e.g., Instructor/Advisor-Student) in that the Mentor does not necessarily supervise the Mentee's course of study but provides guidance and support in a significant way. Similarly, a senior ranking faculty member may also mentor a junior faculty member.*

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Relationship	Corresponding Type	Definition
Other Personal or Professional Relationships (Continued)		
Acquaintance	Acquaintance	**Acquaintance:** A person whom one knows casually either through social or professional connections but who is not a particularly close friend.
Neighbor	Neighbor	**Neighbor:** Individuals who live next to one another or in close residential proximity.
Roommate	Roommate	**Roommate:** One of two or more persons sharing the same room or living quarters, typically during his or her time at a university.
Joint Venture	Joint Venture	**Joint Venture:** A cooperative business entity or arrangement involving two or more individuals who share ownership, returns, risks, and governance. A joint venture can exist between individuals or organizations.
Collaborator	Collaborator	**Collaborator:** Individuals who work with other individuals or organizations on an activity or project for a period. The arrangement is typically more casual than a joint venture in that the relationships may not be formalized in a contractual manner. May also be used to capture relationships between advisors and organizations (e.g. an investor's relationship to a start-up) who is not officially affiliated with the organization as either an employee or board member.
Client	Service Provider	**Client**: A person or organization served by or utilizing the services of another person or organization. **Service Provider**: An individual, vendor, or organization who is contracted or retained to perform specialized work for an individual. These relationships may be tracked in the system in order to identify a third party who serves as a liaison between a constituent and the University (e.g., an accountant who provides guidance for a prospect).
Client	Power of Attorney	**Client**: A person or organization served by or utilizing the services of another person or organization **Power of Attorney**: This relationship pairing is used specifically to identify the planned gift relationships for a constituent, typically regarding an estate. UIF Trust Services is the most common user of this information, when known.
TED Only Relationships		
*This relationship type indicates a **non-relationship** with another similarly named but distinct entity. The relationship helps to ensure that the similarly named records are not inadvertently merged or that information is not manually added to the incorrect record.*		
Not Duplicate	Not Duplicate	**Not Duplicate:** A term used in the TED system to indicate when two constituents with similar names and sometimes similar locations similar locations who are distinct individuals or organizations and should not be merged.

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Individual to Organization

Relationship	Corresponding Type	Definition
Fiduciary Relationships		
Fiduciary relationships reflect individuals who have a fiduciary or financial decision-making responsibility for an organization. These are most commonly corporate directorships or governing boards of large nonprofit organizations. These kinds of relationships can be used to identify people who may influence the organization's decision-making or who may be able to provide introductions between the University and the organization. *Non-fiduciary relationships (other boards, committees, volunteerism, etc.) are tracked in committees in TED.*		
Board Member	Organization	**Board Member:** An elected or appointed participant on the board of directors of a corporation or the supervisory committee of an organization. **Organization**: A legally recognized entity that may be a business, foundation, family foundation, non-profit, or government agency.
Trustee	Organization	**Trustee**: An individual entity given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified. **Organization**: A legally recognized entity that may be a business, foundation, family foundation, non-profit, or government agency.
Employment Relationships		
Employment relationships create visible and analytical cues for potential capacity and for management of prospects, both individual and organizational. This includes executive titles/Career Level, employees in high-income occupations, and owners/founders of high-profile companies. Additionally, this information often serves as the basis for marketing content and stories about the impact the university system has on local communities, the state, and the world (total number of female CEO alumnae running Fortune 500 companies, total number of alumni teaching in the Chicago Public Schools, alumni on every major medical foundation board, etc.) and can provide the data necessary for targeted marketing ("to be seen by my alumni, where in the city of Chicago should I put these Illinois billboards", or "which office buildings have the most UIC alumni employees so I can buy elevator ads", etc.). Further, these relationships can also serve as indicators of current contact information when that information has not been updated elsewhere.		
Employee	Employer	**Employee**: One employed by another usually for wages or salary. **Employer:** A person or company that provides a job paying wages or a salary to one or more people.

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Philanthropic Relationships		
Beyond fiduciary or employment relationships noted above, relationships between donors with matching gift history and the organization which matched the gift provide cues for gift administration to manage a successful matching gift program. These relationships are added by UIF to track prospects who have completed matching gift paperwork and for whom matching gift claims and matching gift revenue will be applied. Only previously matched prospects will have this relationship and therefore it is not a comprehensive view of matching potential for a particular company. Further, these relationships can also serve as indicators of current contact information when that information has not been updated elsewhere (employment information indicates that person is employed at State Farm, but Caterpillar has recently matched his gift as an employee).		
Matched Donor	Matching Organization	**Matched Donor**: An individual who has made a donation that is tied to a separate contribution by an associated organization. **Matching Organization**: An organization that will make a donation dependent upon a donation made by a separate donor or employee. NOTE: If a constituent with a Matched Donor relationship leaves their place of employment associated with the Matching Organization, the Matched Donor/Matching Organization relationship will be end-dated in TED by an automatic process. An exception is made for retirees. Constituents with an end-dated employment relationship and a Job Schedule value of "Retired" will not have their Matched Donor/Matching Organization relationship automatically end-dated because some employers still match gifts for retired staff.

Organization to Organization

Relationship	Corresponding Type	Definition
Philanthropic Organization Relationships		
These types of relationships in TED flag the philanthropic arms of the main organization itself. In some cases, an organization may only make gifts to the University through an established Matching Gift Program and otherwise has no philanthropic inclination toward the University. In others, an organization may make all of its philanthropic contributions to the University through its formalized Foundation, rather than making gifts directly from the corporation itself.		
Matching Gift Program	Organization	**Matching Gift Program**: A program designed by a company or organization to encourage donations to non-profit entities by employees if the donation is matched by the organization or company. A Matching Gift Program is not necessarily a legal entity or separate company; however it is maintained in TED as a separate organization in order to track matched donor relationships. **Organization**: The organization that designed the matching gift program participated in by the organization's employees.
Foundation	Organization	**Foundation:** A legal category for a nonprofit organization that will typically either donate funds and support to other organizations or provide the source of funding for its own charitable purposes.

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		Organization: A legally recognized entity that may be a business, foundation, family foundation, non-profit, or government agency.

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Relationship	Corresponding Type	Definition
Other Corporate Hierarchy Relationships		
Other relationships between organizations are used to properly structure corporate hierarchies, allowing for all company locations to be appropriately identified. The diversity of a company's business interests – and therefore the diversity of its philanthropic interests – is best indicated through the maintenance of records for distinct subsidiaries or branch offices. Other corporate hierarchy relationships are also used to appropriately tie constituent employees to the appropriate business location; in some cases, a new company location is added to TED because of a board or employment relationship to a constituent.		
Subsidiary	Organization	**Subsidiary**: A distinct organizational entity (e.g. a business, non-profit organization, government agency, etc.) that is owned or controlled by another entity. **Organization**: A legally recognized entity that may be a business, foundation, family foundation, non-profit, or government agency.
Branch Office	Organization	**Branch Office**: A location, other than the main office, where business is conducted, often comprised of smaller divisions of different aspects of the company. Note this is different from a Subsidiary in that a Branch Office denotes a unique location but not a distinct corporate entity. **Organization**: A legally recognized entity that may be a business, foundation, family foundation, non-profit, or government agency
Defunct Company	Successor Company	**Defunct Company**: A company that has ceased to exist. **Successor Company**: A new business that directly replaces an old one. *This relationship is used to track historical organization relationships; it may be used in lieu of the Merge function to maintain the integrity of historical corporate data and to keep previous organizational giving attached to the original entity, rather than move giving to the new entity.*
Other Professional Relationships (Non-Corporate Hierarchy Relationships)		
Other professional relationships (some noted above in individual-to-individual relationships and here) are identified in TED to show partnerships between entities that otherwise are not part of a formal corporate structure or hierarchy. These relationships may be critical to understanding the capacity of a prospect (individual or organization).		
Joint Venture	Joint Venture	**Joint Venture:** A cooperative business entity or arrangement involving two or more individuals who share ownership, returns, risks, and governance. A joint venture can exist between individuals or organizations.
Collaborator	Collaborator	**Collaborator:** Organizations that work jointly on an activity or project for a period. The arrangement is typically more casual than a joint venture in that the relationships may not be formalized in a contractual manner.
Client	Service Provider	**Client**: A person or organization served by or utilizing the services of another person or organization. **Service Provider**: An individual, vendor, or organization who is contracted or retained to perform specialized work for an individual. These relationships may be tracked in the system in order to identify a third party who serves as a

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		liaison between a constituent and the University (e.g., an accounting firm which provides guidance for a prospect).
Relationship	**Corresponding Type**	**Definition**
Other Professional Relationships (Continued)		
Associated Company	Associated Company	**Associated Company:** Organizations that have a relationship worth noting but are not part of the same corporate hierarchy. *For example, a variety of area restaurants all may be owned by the same owner, but those restaurants may not be part of a formalized restaurant group, which would have a corporate hierarchy. This may also be seen with real estate holdings, where each property is its own incorporated entity, to ensure that liability on one property is not extended to every property.*
TED Only Relationships		
*This relationship type indicates a **non-relationship** with another similarly named but distinct entity. The relationship helps to ensure that the similarly named records are not inadvertently merged or that information is not manually added to the incorrect record.*		
Not Duplicate	Not Duplicate	**Not Duplicate:** A term used in the TED system to indicate when two constituents with similar names and sometimes similar locations similar locations who are distinct individuals or organizations and should not be merged.

Inactive Relationships

There are relationships that were active in the past but have been moved to inactive status. These relationships will appear under the relationships tab under the Type field but can no longer be applied to a new relationship. End users should be aware that while data cleanup is underway, they may encounter these relationship types on existing records.

Relationship	Corresponding Type	Definition
Advisor (Grad Student)	Grad Student	**Advisor**: A faculty representative assigned or chosen to provide advice or guidance to a graduate student about his/her course of study and/or thesis or dissertation. **Grad Student**: A student pursuing an advanced degree.
Advisor (Postdoc)	Postdoc Student	**Advisor (Postdoc)**: A faculty representative assigned or chosen to provide advice or guidance to a graduate student about his/her course of study and/or thesis or dissertation. A staff or faculty member who supervises a postdoctoral researcher's work. **Postdoc Student**: An individual with a doctoral degree engaged in supervised postgraduate research and training.
Advisory Board Member	Organization	**Advisory Board Member**: A member of a body that provides non-binding strategic advice to the management of a corporation, organization, or foundation. **Organization**: An organized body of people with a particular purpose, especially a business, society, association, etc.

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Relationship	Corresponding Type	Definition
Classmate	Classmate	**Classmate:** A member of the same class in a school or college.
Co-Director	Co-Director	**Co-Director:** One of two or more individuals from a group of managers who leads or supervises a particular area of a company, program, or project.
Co-Member	Co-Member	**Co-member:** One of two or more members of a civic, philanthropic, or social organization/group.
Co-Owner	Co-Owner	**Owner:** One of two individuals who own a business or organization jointly.
Credit Relation	Credit Relation	**Credit Relation:** identifies constituent who should receive recognition credit for an organization's relationship. These were converted from FACTS and will be replaced with credit defaults on the relevant relationships in TED.
Director	Organization	**Director:** Identifies a board member or trustee of an organization. **Organization**: An organized body of people with a particular purpose, especially a business, society, association, etc.
Division (subsidiary)	Subsidiary	**Division (Subsidiary):** One of the parts into which a business is divided when running as a separate company. **Subsidiary**: A distinct organizational entity (e.g. a business, non-profit organization, government agency, etc.) that is owned or controlled by another entity.
Foreign Main Corporation	U.S. Subsidiary	**Foreign Main Corporation**: An existing corporation that is registered to do business in the United States but was incorporated outside of the United States. **U.S. Subsidiary:** A distinct organizational entity (e.g. a business, non-profit organization, government agency, etc.) located in the United States that is owned or controlled by another entity.
Founder	Company	**Founder:** The individual that established a business or organization. **Company**: A commercial entity.
Fraternity Brother	Fraternity Brother	**Fraternity Brother:** One of two or more individual members of a Greek organization, a society or a club of men associated together for various religious or secular aims.
Key Contact	Corporation or Foundation	**Key Contact:** The main contact for an organization or foundation. **Corporation:** A legal entity that is separate and distinct from its owners. **Foundation:** A legal category for a nonprofit organization that will typically either donate funds and support to other organizations or provide the source of funding for its own charitable purposes.

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Relationship	Corresponding Type	Definition
Main Corporation	Foreign Subsidiary	**Main Corporation:** An existing corporation that is registered to do business outside of the United States but was incorporated within the United States. **Foreign Subsidiary:** A distinct organizational entity (e.g. a business, non-profit organization, government agency, etc.) located outside of the United States that is owned or controlled by another entity.
Main Corporation	Foundation	**Main Corporation:** A legal entity that is separate and distinct from its owners. **Foundation:** A legal category for a nonprofit organization that will typically either donate funds and support to other organizations or provide the source of funding for its own charitable purposes.
Matching Gift Program	Corporation or Foundation Affiliate	**Matching Gift Program**: A program designed by a company or organization to encourage donations to non-profit entities by employees if the donation is matched by the organization or company. **Corporation/Foundation Affiliate**: The organization that designed the matching gift program participated in by the organization's employees.
Owner	Company	**Owner**: One who has the legal or rightful title to an organization or company. **Company:** A commercial entity.
Parent Corporation (Division)	Division	**Parent Corporation (Division)**: The organization with legal responsibilities for any divisions of the same or different organization name. **Division:** One of the parts into which a business is divided often along product or service lines.
Sorority Sister	Sorority Sister	**Sorority Sister:** One of two or more individual members of a Greek organization, a society or a club of women associated together for various religious or secular aims.
Surviving Spouse/Partner	Spouse/Partner Deceased	**Surviving Spouse/Partner:** The widowed spouse of a deceased individual. **Spouse/Partner Deceased:** A deceased person who was married to or partnered with another individual.
Teammate	Teammate	**Teammate:** A fellow member of a team.

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UNIVERSITY APPOINTMENTS

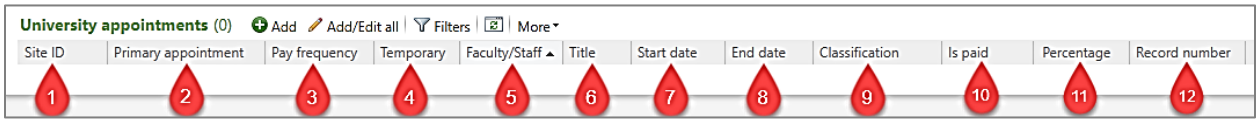
UNDERSTANDING UNIVERSITY APPOINTMENTS IN THE TED SYSTEM

The University Appointments section clearly identifies any employment specific to the University of Illinois System. On the 10th of each month UIF IT staff will import a data file; the data is loaded into TED as soon as possible thereafter. Any individual with an entry in the Banner system, which outputs to the Electronic Data Warehouse (EDW) for employee data will be imported into the file to be processed through TED. The file from the EDW will be matched against the prior EDW file and only new and changed information will be loaded into TED. Most employees of affiliated agencies such as University of Illinois Foundation and University of Illinois Alumni Alliance will not be in the EDW file; these individuals must be manually entered by the UIF AIMS team. If an individual, who does not need to be manually entered, is not listed in the University Appointments section of the Relationship sub-tab of the Relationships tab, please check with the human resources staff in the employee's unit to make sure he/she has been entered in Banner correctly.

An individual can have multiple faculty/staff appointments in Banner, but the total percentage of appointments may not exceed 100%.

University Appointments Section

University Appointments can be found on the Relationships tab of a constituent's individual record.



1. The **Site ID** identifies which campus, college, and department is associated with the constituents UI employment.
2. The **Primary appointment** has the highest percentage of time allocated. This is also normally the area that pays the constituent.
3. The **Pay frequency** indicates how often the constituent is paid.
4. The **Temporary** column indicates if the position is a temporary or a permanent position.
5. The **Faculty/Staff** column indicates if the position is a faculty, staff, or a manually entered Non-Banner/United Reported (unit staff have knowledge that the constituent at one time was employed by the University of Illinois System prior to Banner implementation, or the individual is currently employed, but not entered/paid through the Banner system).
6. The **Title** column is the title associated with the appointment. This is not always the official title the constituent holds, but often an abbreviated form of the title.
7. The **Start date** indicates when the constituent began the appointment.
8. The **End date** indicates when the constituent ended the appointment.
9. The **Classification** comes from information stored on the university appointment in Banner. This includes Employee Class, Services Reference, Rank, Rank Modifier, and Status Modifier.

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Examples of this would be Academic Professional, Academic Hourly, Faculty Tenured, Department Head, RAMP Administrator, Graduate Teaching Assistant, Fellow Postdoctoral, etc.

10. **Is paid** indicates that the appointment is a paid position.
11. The **Percentage** column indicates the amount of time allocated to that specific appointment.
12. Banner identifies each appointment with a unique **Record number**. To help link the appointment between the two systems, the unique record number from Banner is imported with the other appointment information. University appointments that are manually added to the TED system (Non-banner/Unit Reported) will have a unique record number starting with the letters **NB**. The unique record number will not be overwritten when new information is added to TED from the Banner data import.

Updates

Banner is an authoritative source for university appointments. When Banner data is imported into TED, processes will update any changes that have been made in the Banner system, including address information. For example, if a campus address in Banner is no longer correct, the campus address must be changed in the Banner system prior to the import process or TED will continue to display incorrect address information. Also, in the case of addresses, the address associated with the highest FTE position is used.

If there are former faculty or staff that have not been identified (prior to the Banner implementation), therefore are not marked as faculty or staff in Banner, and have no entries in the University Appointment section, fill out a help desk ticket using the UIF IT Services Portal to request this information be added to the constituent's record.

Specialties

When a constituent has a residency with any of the University of Illinois schools or colleges, the residency is added to the record under University Appointments via a Banner update. The information held in this entry does not always identify the constituent's area of practice during his/her residency. Information on the constituent's area of practice during residency is gathered on the constituent's individual record, on the Personal Info tab under the Personal sub-tab in the Specialties section.

After graduation, the constituent may have a specific area of practice beyond what was studied while attending the University of Illinois. For example, a constituent may have been a pharmacy resident but is now practicing dermatology. Information on the constituent's current area of practice is gathered on the constituent's individual record, on the Personal Info tab under the Personal sub-tab in the Specialties section.

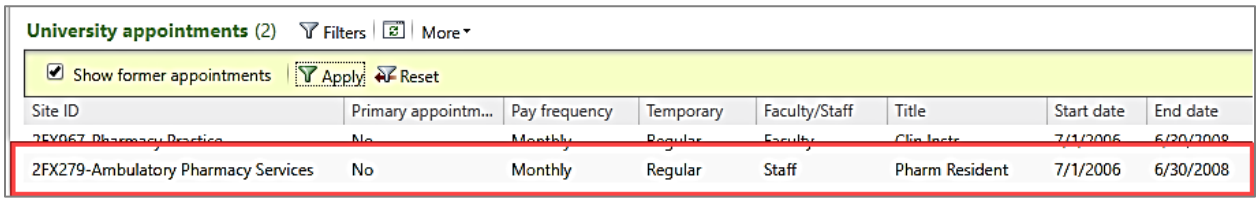
At this time only two areas are making use of the Specialties section in TED: Health Sciences and Law. Additional areas may request the use of this area by submitting a request through the UIF IT Services Portal.

Once a residency, fellowship, or internship specialty has been added to the record with an end date the individual record will update with a Former Resident/Fellow/Intern constituency.

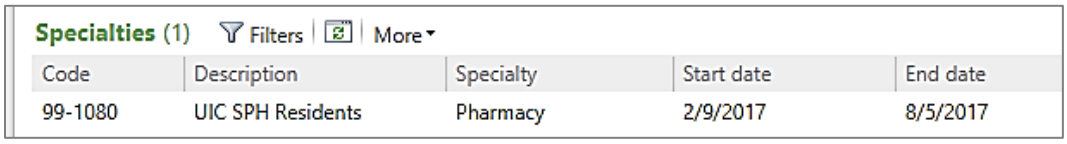
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Residencies

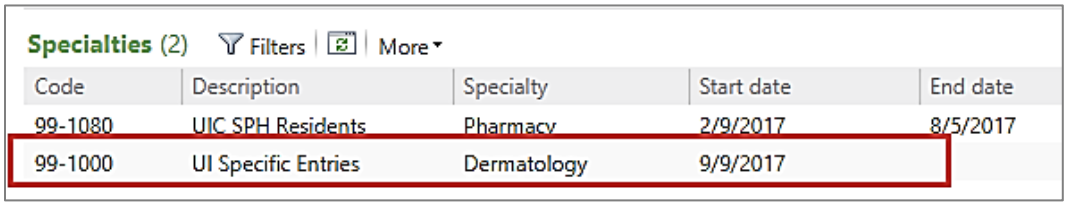


Residencies that are paid through the University of Illinois system are added to the record under University Appointments through a Banner update. This addition to the record does not contain the area of practice associated with the residency.



A request for the area of practice associated with the residency to be added to the record in the Specialties section can be made via a Bio Feedback Add request from the Comments tab on the constituent's individual record.

Current Area of Practice



To identify constituents for segmentation purposes it is important to identify his/her current area of practice. This information cannot be added via an automated system. It must be requested by the user and added manually by the UIF AIMS team.

Requesting a Specialty on a Record

To request a residency specialty or current area of practice specialty be added to an individual constituent's record complete a Bio Feedback Add request from the Comment tab on the individual record.

Requesting a New Specialty

To request an additional specialty be added or to request an edit to the current entries in the Specialties area please submit a request through the UIF IT Services Portal.

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COMMITTEE SUB-TAB

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ENGAGEMENT

AT THE UNIVERSITY OF ILLINOIS

Engagement interests, strategies, and activities are critical to university-public-private partnerships, a robust active and long-term fundraising pipeline, and strong programs within the universities themselves. Much of the engagement that occurs with constituents may happen *outside* the advancement operation.

TED offers not just the ability to track engagement after it occurs but to more cohesively manage day-to-day engagement activities directly in the database, rather than in spreadsheets on the side.

The information that results from engagement activities is critical to prospecting, determining a constituent's interests, identifying gaps in engagement opportunities (individually or holistically), uncovering future leaders, maintaining a historical record despite staff turnover, or providing door-opening leads for university leadership.

While a traditional development model suggests that alumni relations is at the base of a giving pyramid, the University of Illinois acknowledges that engagement can occur throughout a prospect's lifecycle, while it may take on different names.

- As part of a strategy session for a principal gift prospect who has never made a gift, gift officers may identify *cultivation* activities to help advance the relationship with that prospect—a specific committee may be identified for which the constituent should be invited to join, he/she may be invited to speak at an event.

- A recent graduate may choose to become an advisor to the student group he participated in while a student; he may attend a roundtable event his college is offering; he may decide to take on a leadership role in a local alumni club.

- A faculty member may continue to meet regularly with one of his advisees while that advisee is working on launching her startup. That advisee may be invited to speak in the professor's classroom each semester.

- In addition to invitations to *stewardship* events or communications recognizing donors for recent gifts, prospect and plan managers may identify thoughtful, personalized next steps for that prospect to keep him engaged between the closure of his recent gift and his next gift.

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COMMITTEE OVERVIEW

TRACKING ENGAGEMENT THROUGH COMMITTEES

Committee records are a Group constituent type, consisting of multiple people or organizations managed or treated collectively (board or committee meetings, during reunion times, etc.) —or for specific long-term timeframes—entire fiscal or academic years, for example.

Committee records show the aggregate data of the committee members. Committee records can be accessed through a Committee search, or from a member's constituent record, via the Relationships tab, Committees sub-tab.

Committee records track involvement dates and member roles. Committees are most often term-based involvement—academic year, fiscal year, cohort-based, calendar year, etc. They are typically associated with specific roles that the constituent holds within that group, like chair or secretary or recipient.

Advancement Uses

Tracking information in the committee area provides a variety of benefits:

1. Visualization of all past, current, declined, and prospective members of a group in one place.
2. Segmentation for marketing or further strategy development of particular types of engagement. For example: all leadership roles within the last 10 years or all members of women's organizations.
3. Management of the cycle of activities pertaining to a particular group—board recruitment, award nominations and selections, board meeting management, etc.

TED uses the term "committee" to indicate a special kind of group or collection of records that may also be leveraged for setting goals, fundraising, etc. The term "committee" does not mean that the only information tracked in this area of TED are truly "committees," like alumni committees.

The kinds of information that live in TED committees are:

- University of Illinois student engagement, like registered student organizations or student athletics. (i.e. *U DIA Men's Ice Hockey; C Alpha Phi Sigma)*
- Non-governing boards and committees, both within the University and outside (i.e. *C DENT Strategic Advisory Board*; *S Memorial Medical Center Board*)
- Other groups and clubs, like alumni club leadership or accelerators. (i.e. *U MEDIA Leadership Council; C Friends of The Arts Club; S SAFFR Community Garden Club*)
- Recognition awards that are **not** funded through donor funds (i.e. *Grammy Award; S Loyalty Award; U LAW Distinguished Alumni Award; UIAA Illini Comeback Award*)

Scholarship recipients are tracked in the Fund Recipients area, rather than in the Committee area.

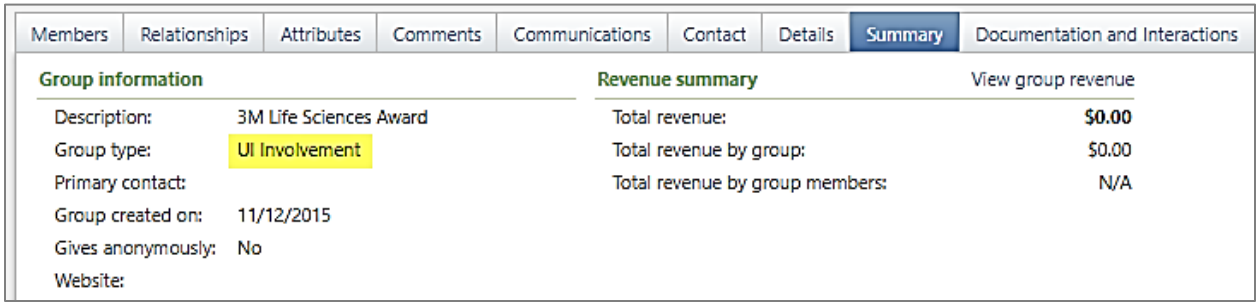
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Committee Types

Committees are categorized into two group types–UI Involvement for engagement related to the University of Illinois System, its three universities, the Alumni Alliance, and Foundation and External Involvement for engagement outside the University of Illinois System.

The committee type is located on the Summary tab of a committee record.



The site/unit associated with a committee is located on the Site tab.

Committee Members

Committee members can be individuals, organizations, or other committees and are typically associated with specific roles that the constituent holds within that group, like chair, secretary, or recipient.

Household records should not be added to a committee.

Committee data is maintained manually by units. For large amounts of data, a file can be submitted using the form under UIF Help.

Committee Start and End Dates

Accurate start and end dates provide meaningful information on the committee record. This could be the start date a constituent joined the committee or received an award. The end date can be used to signify the constituent's last day on a board, for example.

Committees in your Unit

It may be helpful to become familiar with the committees in TED for your unit. This can be done by searching for committees with your unit's short name for example U FAA, C MED, or S ADM.

Volunteers versus Committees

Where committees track broad, group-based engagement, the volunteer area identifies and tracks constituents interested in fulfilling, or those who have fulfilled, specific volunteer opportunities that are often individual or personal in nature—mentoring, speaking in classrooms or at events, or assisting with admissions recruiting.

The volunteer area can track a constituent's *interest* in specific types of volunteer opportunities as well as that constituent's skills or availability. Engagement managers can match interested volunteers to

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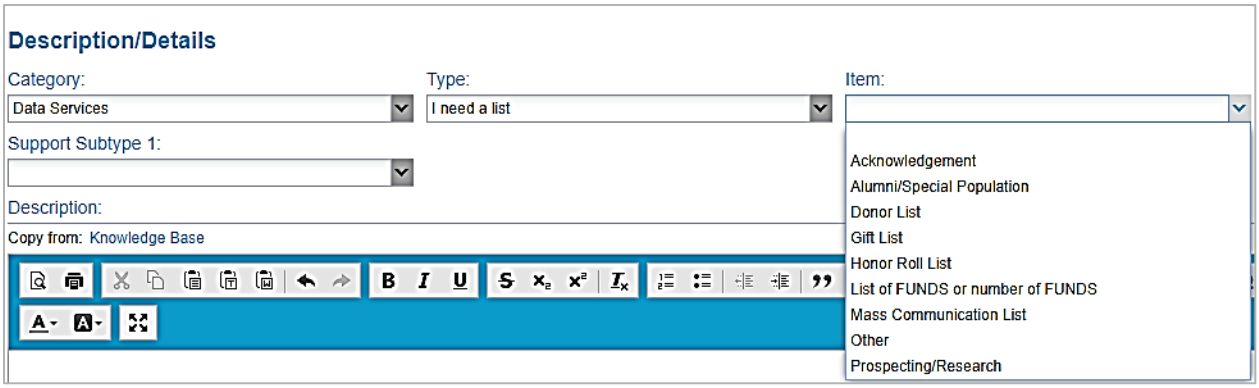
upcoming volunteer opportunities (called occurrences) and schedule one or an entire fleet of volunteers depending on the needs of that particular volunteer opportunity.

Once the engagement opportunity has ended, engagement managers can track those who actually participated in that volunteer opportunity, rather than just who agreed to volunteer (no shows, cancelations, etc.). Not term-based, but rather date based, the volunteer area offers the ability to track the large variety of dates that a particular set of volunteers may individually perform.

When is it Not a Committee?

While committees are useful for grouping constituents with something in common together who will be managed collectively, rather than individually, a committee is not necessary solely to opt constituents into marketing or portfolio management initiatives. Committees are not created in TED to replicate information that already lives elsewhere in the database nor as an alternative for adding information to TED where that information does belong.

To get a data list with multiple criteria, you can log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



These are other areas in TED that may be more suitable than a committee for tracking involvement.

Attributes	Attributes store recognition societies such as Chancellor's Circle, President's Council or Dean's Club.
Educational Involvement	Educational involvement is used to track items not shown on the University of Illinois degree record. Examples include: Alternative Study, Course, Emphasis/Concentration, Exchange Student, Other Certificate, Student Type, Studies Program, Study Abroad, and Thesis/Dissertation Topic.
Employment/University Appointments	Faculty/Staff, Student workers, Residents/Interns display here.
Events	The Events tab displays all events the constituent has attended.

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Mail Preferences	On the Preferences tab of the constituent's Communications page, you can manage the constituent's communications preferences (opt-in). This displays the types of mail sent to a constituent such as appeals, or general correspondence.
Revenue	Committees should not be used to create donor lists.
Scholarships	Non-financial awards can be tracked in the Committee area. Scholarship recipients are tracked in the Fund Recipients area of TED, rather than in the Committee area.
Specialties	On the personal tab of a constituent record, Specialties are used to further classify based on employment.
Solicit Codes	Solicit codes are used to exclude or opt-out a constituent from communications by mail, phone, or email.
Volunteers	A constituent who voluntarily undertakes a task or specialized piece of work and expects no pay in return. Adding a volunteer type and availability allows units to easily find people to help when the time comes. Volunteer timesheets track hours a constituent volunteer and a dollar value can be assigned to those hours.
Wealth & Ratings	On the Wealth and Ratings page, you can view the wealth data gathered on a constituent.

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LOCATING COMMITTEE RECORDS

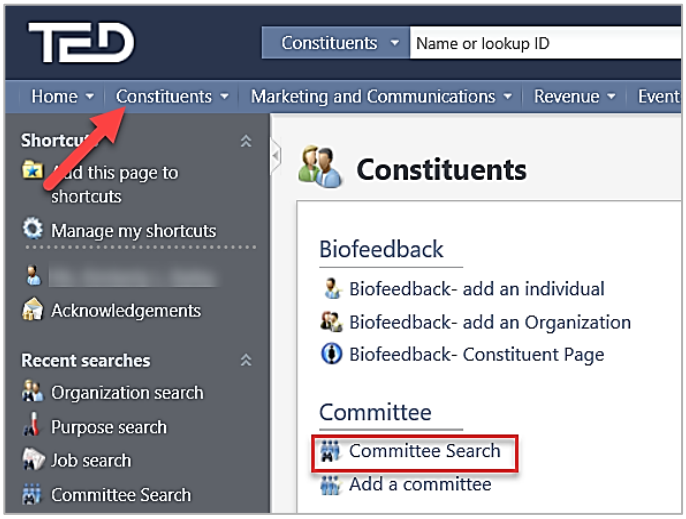
USING COMMITTEE SEARCH AND OTHER OPTIONS

The best way to search for a committee record is through the Committee Search window, but you can also find them via the constituent search window. Below you will see those search options as well as how to locate a committee on a constituent record.

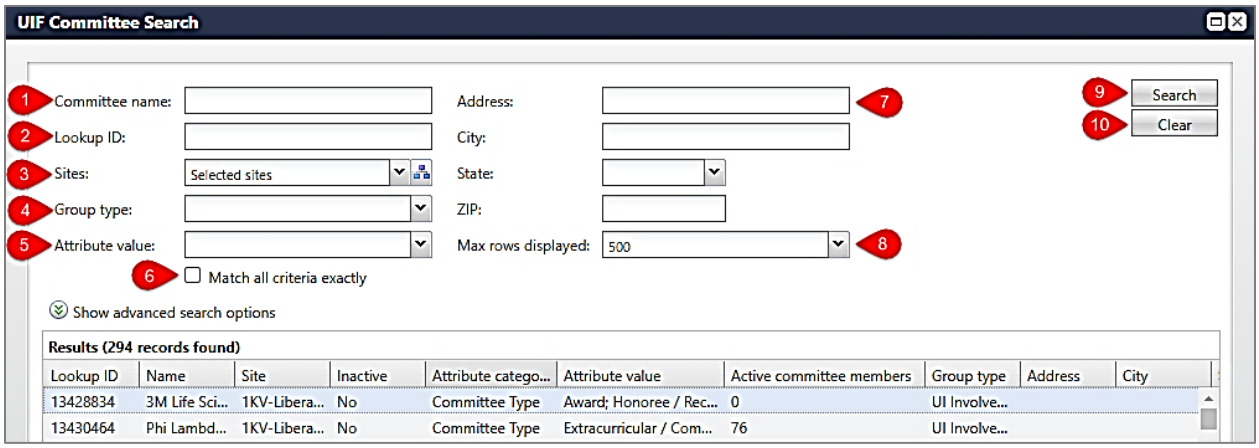
Committee Search Window

To open the **committee search** window, click the **Constituents** menu in the blue navigation bar, then the **Committee search** link to open the Committee Search Window.

Note: Hovering over the Committee Search option will display an option to save a link to this search on the left side of the screen. If a link to the committee search has already been saved, selecting to save the committee search again will copy over the link already there.



Committee Search Options



1. **Committee Name** – Search by committee name or portion of a committee name.
    a. Committees for a unit can be found by using the unit's short name. For example **U MEDIA**.
    b. Use a wildcard (%) symbol and a portion of a committee name. For example you can find all Advisory Board committees by searching for **%Advisory Board%**.

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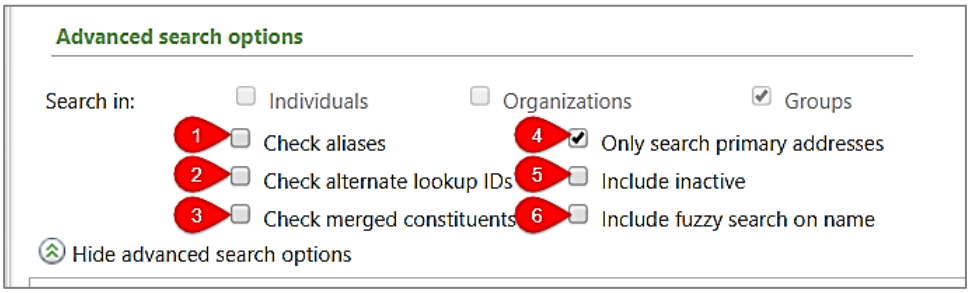
   c. Combine these two techniques to find specific committees by college and keyword. For example searching for **U MEDIA %Advisory%** returns all committees that start with U MEDIA and have the word Advisory somewhere in the name.

2. **Lookup ID** – Search by the committee Lookup ID number. For alternate lookup ID's, such as the legacy FACTS ID check that the alternate lookup ID box is checked in Advanced search options. This will only return results if an alternate lookup id is located on the record.
3. **Sites –** Use the site search to locate committees by site number. Site numbers are stored under the Sites tab of the committee record.
4. **Group Type –** Search for committees by either UI Involvement or External Involvement.
5. **Attribute Value** – Search for committees that have a specific attribute value as one of their options.
6. **Match all Criteria Exactly** – Check this box to return committees that have only the criteria entered. For Example, if you have an attribute value selected, checking this box will return committees that have only that attribute. Committees with additional attributes will not be displayed in the search results.
7. **Address, City, State, Zip** - Search by any combination of these fields to locate a committee by address. It should be noted that most committee records do not have address information on file.
8. **Max Rows Displayed** – Choose how many committees (up to 5000) to allow in the search results.
9. **Search** – Will begin the search.
10. **Clear** – Should be used after searching with the Sites option or when a completely new search is performed.

Advanced Search Options

In addition to the general search options available the Advanced Search Options in the committee search can assist in refining or expanding the search.

Begin by selecting the double arrows to the left of the Show advanced search options field to expand the selection.

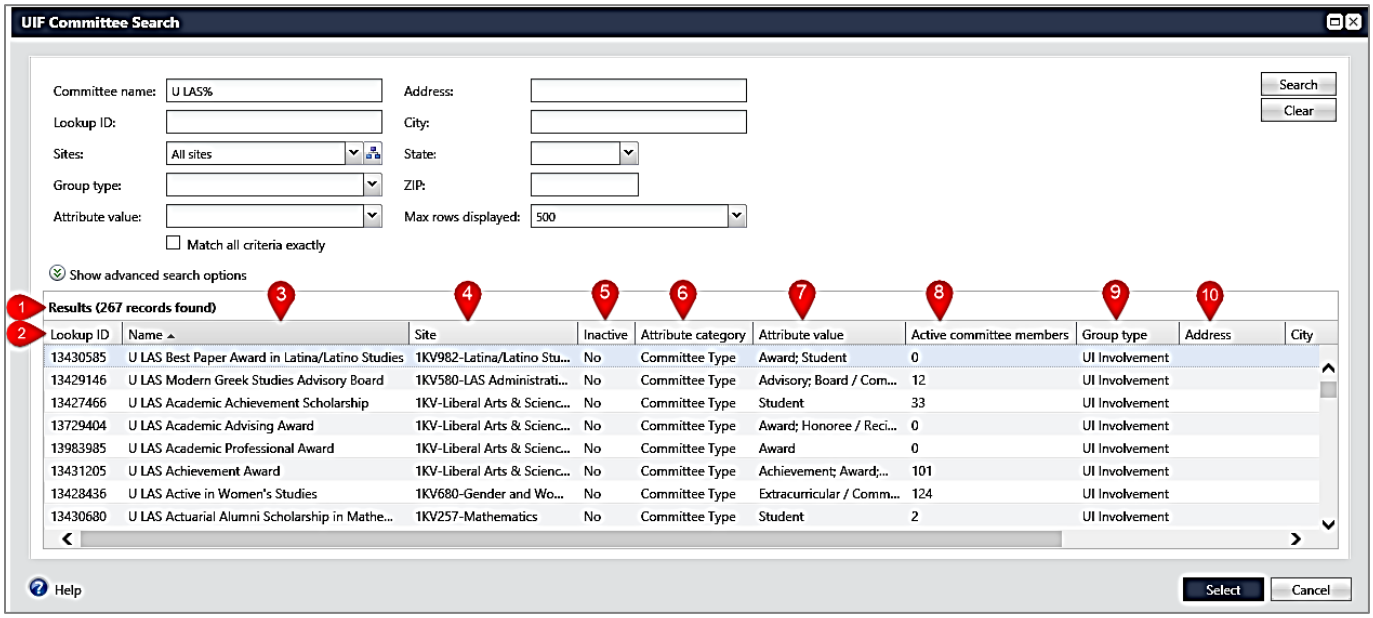


1. **Check Aliases** – Selecting this option will include group aliases if they exist on the record. This works in combination with data entered in the Committee Name field of the committee search.
2. **Check Alternate Lookup IDS -** Selecting this option will include alternate lookup IDs if they exist on the record. This works in combination with data entered in the Lookup ID of the committee search.

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3. **Check Merged Constituents** – Is used when searching for multiple committee records that were merged into a single record. This limits the search options available and should not be used.
4. **Only Search Primary Addresses -** The address marked as primary will be displayed. This option ensures that even if a committee has multiple addresses, it only appears in the search results once.
5. **Include Inactive –** Selecting this option will include committees marked as inactive.
6. **Include Fuzzy Search on Name –** To return constituents with names that sound like the search criteria entered, select this checkbox. This option is only recommended if all other searching has failed.

Search Results

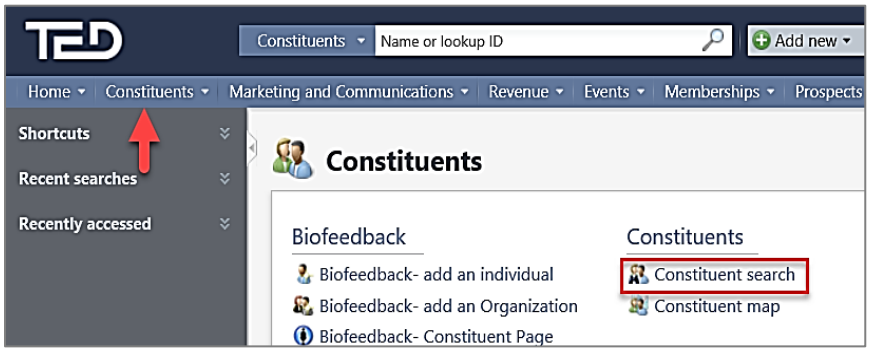


1. **Results** – Most searches in TED only allow up to 100 records in the search results. Committee search allows up to 5000.
2. **Lookup ID** – Committee lookup ID
3. **Name** – Committee Name
4. **Site** – The site associated with the committee. Sites are only applied to UI Involvement committees.
5. **Inactive** – This field displays if the committee is inactive or not.
6. **Attribute Category** – The attribute category of the committee.
7. **Attribute Value** – The attribute values associated with the committee are displayed in this field. They are separated by a semi colon and sorted alphabetically.
8. **Active Committee Members** – The number of active members within the committee.
9. **Group Type** – This field indicates if the committee is considered UI Involvement, or External.
10. **Address (includes City, State, and Zip)** – The address associated with the committee. Most committees do not have an address on the record.

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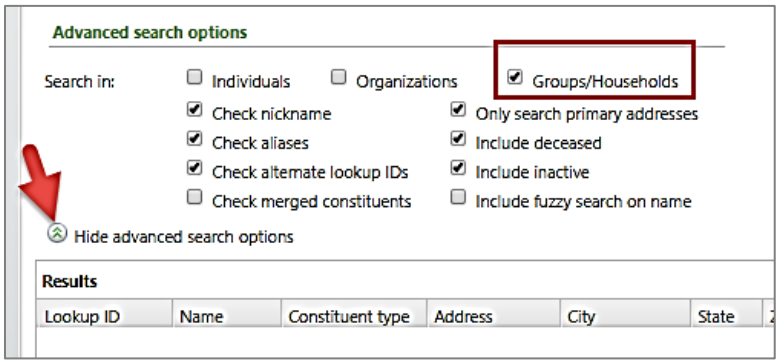
Constituent Search Window

To search for committees from the **Constituent search** window, click the **Constituents** menu in the blue navigation bar, then the **Constituent search.**



Enter any of the criteria that you are searching for (such as name or lookup ID) and select the **Groups/Household** checkbox.

Note: The best way to search for a committee is via Committee Search.



Locating Committees from a Constituent Record

To locate a committee on a **Constituent record**, click the **Relationships** tab, **Committees** sub-tab. Any committee the constituent is involved with is listed here. Connected Committees and Subcommittees will be grouped together in a tree structure providing clarity around what committees exist as child committees under parent committees. Additionally, the roles within the Committee/Subcommittee are displayed.

Select Filters and check the Include inactive box to include the records with an end date.

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The committee name is a blue link allowing you to navigate to the committee record.



Name	Start date	End date
Board of Performing Arts	3/18/2002	
Member- (Role - Board of Performing Arts)	3/18/2002	
Economic Club of Chicago	1/1/2004	
Member- (Role - Economic Club of Chicago)	1/1/2004	
U Chancellor's Advancement Cabinet	5/15/2007	
Member- (Role - U Chancellor's Advancement Cabinet)	5/15/2007	
UIF Foundation Board	9/28/2012	
UIF Foundation Board - Budget and Finance Committee	9/19/2014	
Ex-Officio Member, Voting- (Role - UIF Foundation Board - Budget and Finance Committee)	10/12/2017	9/30/2021
Member- (Role - UIF Foundation Board - Budget and Finance Committee)	9/19/2014	10/2/2015
Member- (Role - UIF Foundation Board - Budget and Finance Committee)	9/30/2021	
UIF Foundation Board - Compensation Subcommittee	10/12/2017	
Chair- (Role - UIF Foundation Board - Compensation Subcommittee)	10/11/2019	
Member- (Role - UIF Foundation Board - Compensation Subcommittee)	10/12/2017	
UIF Foundation Board - Executive Committee	10/12/2017	
Chair- (Role - UIF Foundation Board - Executive Committee)	10/12/2017	10/11/2019
Ex-Officio Member, Voting- (Role - UIF Foundation Board - Executive Committee)	10/11/2019	
UIF Foundation Board - Investment Policy Committee	10/12/2017	
Ex-Officio Member, Voting- (Role - UIF Foundation Board - Investment Policy Committee)	10/12/2017	9/30/2021
Member- (Role - UIF Foundation Board - Investment Policy Committee)	9/30/2021	
UIF Foundation Board - Real Estate Special Advisory Committee	10/23/2020	
Member- (Role - UIF Foundation Board - Real Estate Special Advisory Committee)	10/23/2020	
Chair- (Role - UIF Foundation Board)	10/12/2017	10/11/2019
Chair Elect- (Role - UIF Foundation Board)	10/7/2016	10/12/2017
Director- (Role - UIF Foundation Board)	9/28/2012	
Immediate Past Chair- (Role - UIF Foundation Board)	10/11/2019	9/30/2021

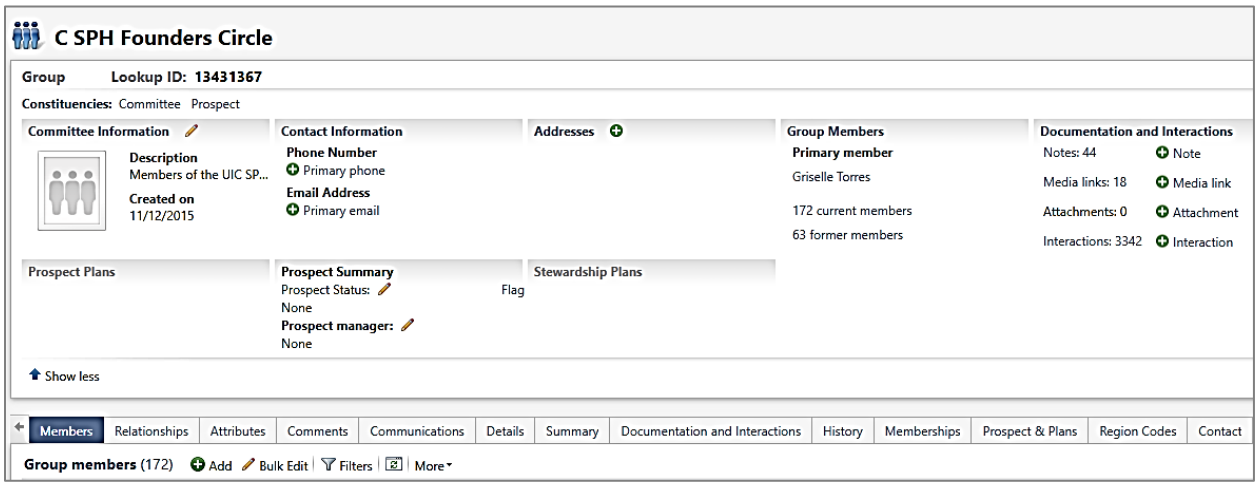
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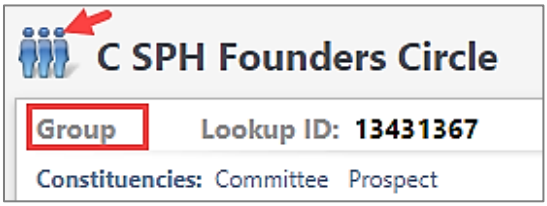
COMMITTEE RECORD DETAILS

READING THE COMMITTEE RECORD

A committee record is also known as a group record in TED. The structure of a committee record is similar to an individual or household record.



A committee record can be identified by the group graphic in the upper left corner and the Group indicator to the left of the Lookup ID.



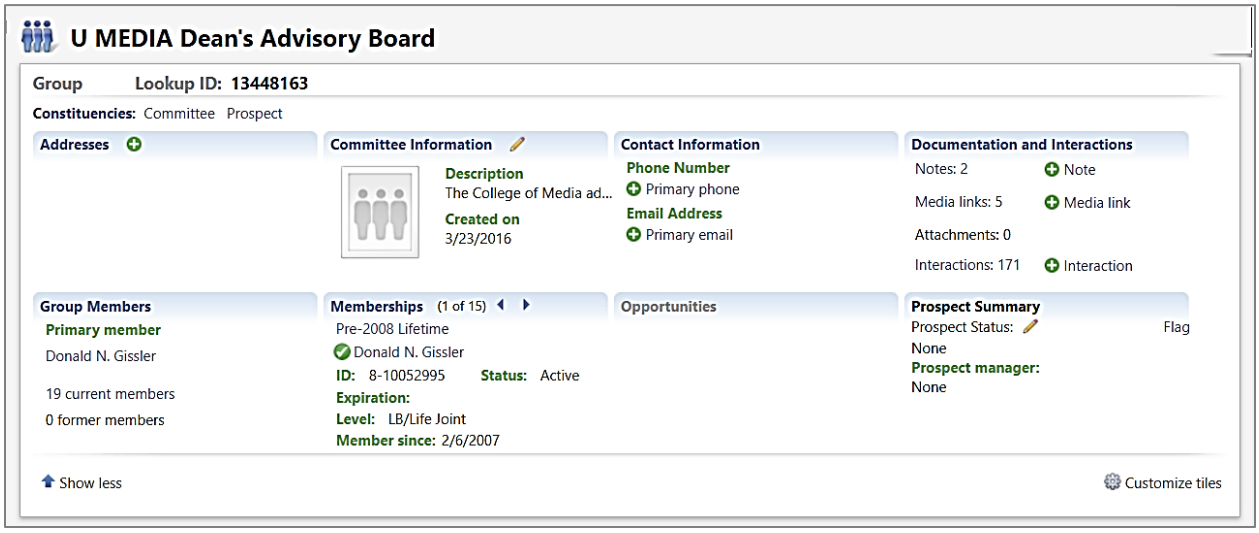
Committees have a unique **Lookup ID**, just like other constituent record types.

Constituencies in blue are clickable links. The Committee link will open the Members tab; the Prospect link will open the Prospect tab.

Summary Tiles

The summary tiles displayed in the upper portion of a committee record show information about the members. Summary tiles contain blue links to navigate to the tab containing this information.

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Addresses Tile – The primary address listed on the contact tab of a committee record. Most committee records in TED do not have an address listed and this will be blank.

Committee Information Tile – A summary of the description of the committee. Hover over this area to see the full description entered on the committee record. The date the committee was created in TED is also displayed in this tile. This tile is listed as Group Information in Customize Tiles.

Contact Information Tile - The primary phone and email listed on the contact tab of a committee record. Most committee records do not have a phone or email listed and this will be blank.

Documentation and Interactions – Documents and organizes any/all interactions with the committee as a group.

Group Members – Displays counts of current and former members as well as the name of the primary committee member.
Note: It is suggested as practice that the staff member responsible for the committee be listed as staff within the committee in TED, and that they be made the primary membery can be surfaced into this tile.

Memberships – Memberships of all committee members that have an Alumni Association membership on their individual record. Arrows allow you to scroll through and view each record.

Opportunities – The opportunities on the plans for which the group is collectively being solicited.

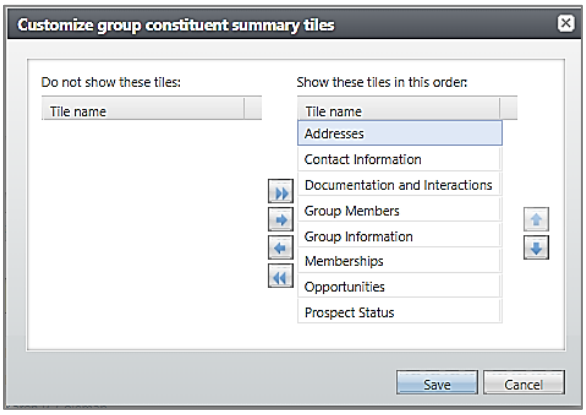
Prospect Summary - The prospect summary (status rating) of the committee, if one has been added to the record then the group will be treated as a collective prospect.

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Tiles can be displayed or hidden using the customize tiles option in the lower right corner of the summary tile section.

TIP - If you find that a committee record loads slowly, disable the Documentation and Interactions summary tile to load committee records faster. This is more likely to be slow for committee records with many members.



Committee Tabs

Detailed information is stored in tabs and subtabs in the bottom part of a committee record. Some tabs are specific to the committee record, and some tabs are compiled from the committee member's individual records.

A tab unique to committees, and household records, is the Members tab. Members and their roles are added to the committee from this tab.

The following table lists each tab and a brief description of what is displayed there.

Tab/Subtab Name	**Description**
Attributes	Committees can be assigned attributes as a method of grouping or categorizing them. AIMS will assign attributes to a committee when created. For a complete list of committee attributes, contact AIMS.
Comments	Bio Feedback Comments are used to submit requests to delete the committee.
Communications	Information displayed on the communications tab of the committee records ties back to the constituents that belong to the committee. This can result in a lot of information being displayed, depending on how many constituents belong to the committee record. The Emails Subtab, contains information for emails sent through WebTools when the committee record is part of the communication.
Contact	Address, phone numbers, email addresses, and social media information for the committee can be stored here. This is specific to the committee and is not for individual member information.

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Details	Constituencies Subtab - Group constituencies for the committee record are displayed here. For all committees' constituencies are Committee and Prospect. In addition, the constituencies for the individual committee members are listed. Details Subtab – **Alternate lookup IDs**, if stored here, can be used in the committee search when choosing the Check alternate lookup IDs. FACTS PSA codes are stored here for committees that converted from the legacy system.
Documentation and Interactions	Documents and organizes any/all interactions with the committee as a group.
History	Various edits, adds, and deletes that have occurred on a committee record are tracked on the history tab. The transactions displayed on the history tab are maintained automatically in TED and may not include all edits.
Members	A listing of all members of the committee and the start and end date of their involvement. Each member's record can be expanded to view the roles and associated dates.
Memberships	Displays the membership of all committee members that have an Alumni Alliance membership on their individual record.
Prospect & Plans	The Prospect & Plans tab contains the current and historical prospect information for the committee. Prospecting information includes subtabs for Prospect Team, Prospect Manager History, Prospect Strategy and Plans. The Prospect Team Subtab allows for editing the advancement staff currently working with the committee. And both the Prospect Team and the Prospect Manager History subtabs show the advancement team history. The Prospect Strategy Subtab shows the historical and active plans as well as any overarching prospect strategies. The Plans Subtab shows only the active plans.
Region Codes	Region Codes are geographical areas, updated by the TED system based on the constituent's contact information. Region codes are used for segmentation purposes in both mass communications and prospecting. Committees can have multiple region codes for each of the subsets based on residential and business addresses.
Relationships	Subtabs available under the Relationships tab are Committees; Fund Purpose Stewardship; Endowment Statements; and Group Member.
Revenue	The Revenue Tab allows the user to see the aggregate giving of the current (not end dated) members of the committee.
Sites	The site or sites assigned to the committee will display here.

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Summary	Displays at-a-glance information about a committee, most importantly the Committee Type (UI Involvement or External). This tab also shows recent interactions or communications for the members of the committee, revenue totals for both the committee and active members of the committee, as well as a list of current active members. The option to mark a committee as inactive is located here for users with access.

Committee Sites

Sites on UI Involvement committees indicate which unit should be credited with affiliation points for that involvement—as in which unit is most responsible for managing the group's activities in real life. While the system allows for the assignment of more than one site on any committee record, there are no plans to start divvying up portions of affiliation points to the various sites a committee represents.

Committee Mass Communications

Annual Giving typically pulls constituents who belong to a committee rather than pull the committee record.

Committee records being used in communication lists generated would happen rarely; however, since they can occur, it is possible that a solicit code could be added to the record. The same would apply for a mail preference code. Should a unit decide to communicate with a committee group, a mail preference code could be added to the committee record. Committee records can have appeal mailing codes if the committee record meets the criteria for the effort. In the case of an email effort, if the unsubscribe link is clicked within the email, then a solicit code is placed on the record.

Under the subtabs, Communication and Appeals, the information found there is for the constituents belonging to the committee. This could result in a lot of information being noted there depending on how many constituents belong to the committee record. The Emails Subtab will only have information for emails sent through WebTools when the committee record is part of the communication.

End dates of committee member's roles may affect the mass communications depending on the request. If current members are requested, then those with an end date are not included. If current and former members are requested, then all members are included regardless of end date. For this reason, if a constituent has been added to a committee in error they should be deleted and not end dated.

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UPDATE COMMITTEE RECORDS

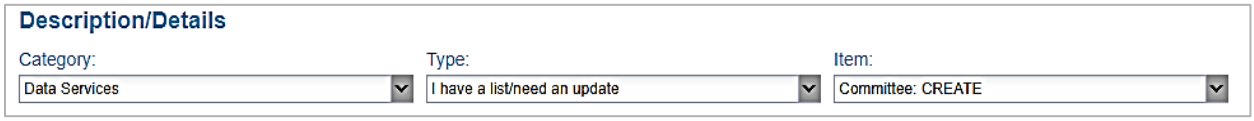
HOW TO ADD, CHANGE OR REMOVE A COMMITTEE

Access

To obtain access to add/update members of a committee, you first need to attend training. Please email aims@uif.uillinois.edu for more information.

Request a New Committee

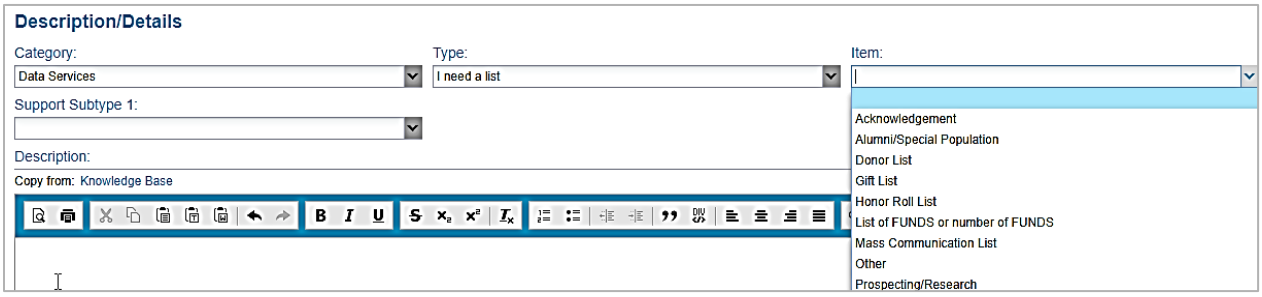
New committee records can be requested by logging in to UIF Support using the link https://support.uif.uillinois.edu and choosing the options in the template below.



Deactivate or Delete a Committee Record

Committees are not generally deleted from TED (unless created in error), but can be marked as inactive.

If you would like to have a committee marked inactive, log in to UIF Support using the link https://support.uif.uillinois.edu and choose the options in the template below.



Provide the **Committee Name** and **Lookup ID** (located under the name of the committee on the Committee record) in the ticket.

Committees marked as inactive will display as shown here:

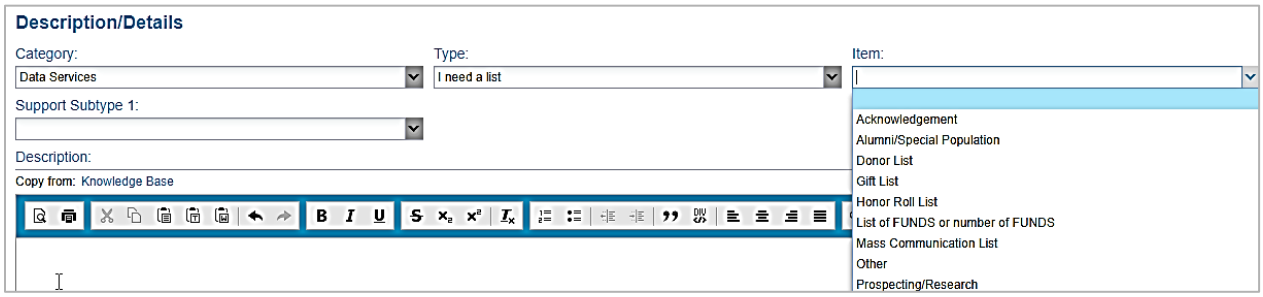
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NOTE – Committee members should not be added to an inactive committee.

Updating Committee Records

Changes to committee records such as name, descriptions, image, website, or Group Type can be requested by logging in to UIF Support using the link https://support.uif.uillinois.edu and choosing the options in the template below.



Provide the **Committee Name** and **Lookup ID** (located under the name of the committee on the Committee record) along with the details of the change you would like made in the ticket.

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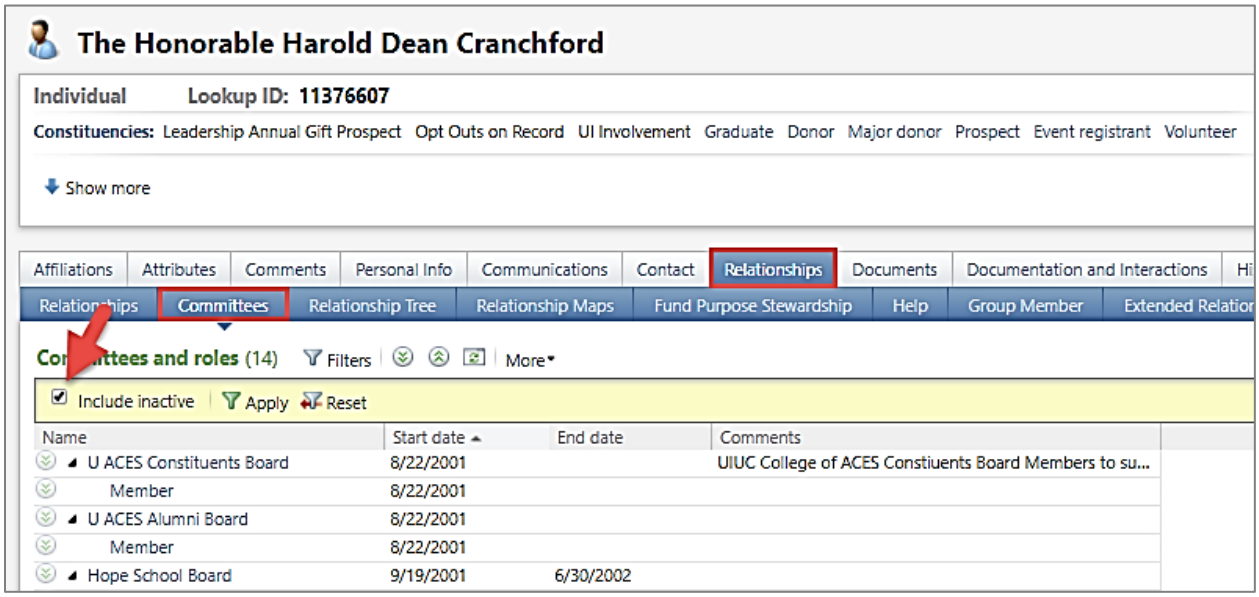
CONSTITUENT VIEW OF A COMMITTEE RELATIONSHIP

VIEWING A CONSTITUENT'S ENGAGEMENT

Constituent committee involvement can be viewed from the constituent record, Relationships tab, Committees sub-tab or Group Member sub-tab.

Committees View

To include committees where the constituent is a former member (those with an end date), click **Filters**, check the **Include inactive** box, and click **Apply**.



The committee name is a clickable link that will take you directly to the committee record.

It is possible to edit the constituent's committee membership or role from this view.

Group Member View

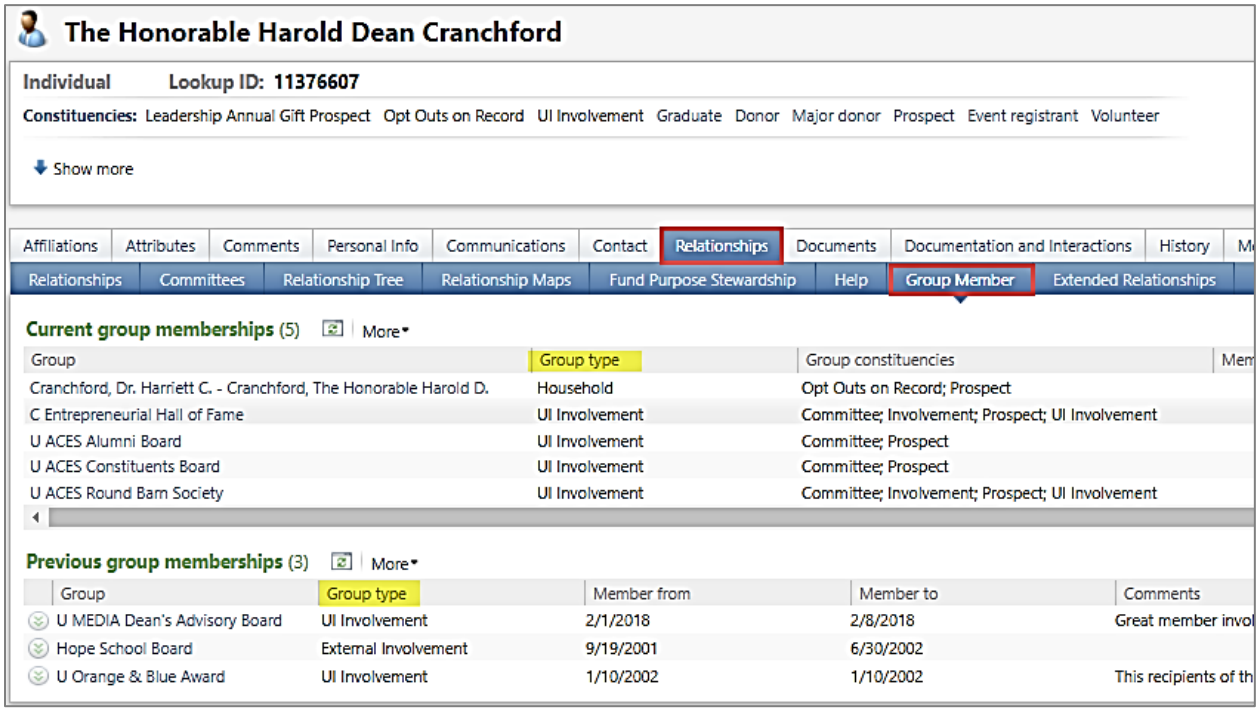
Another view of a constituent's committee involvement is from the Relationships tab, Group Member tab. This option divides involvement into current and previous memberships.

This view includes the constituent's membership to his or her household record (see the Group type column).

The type of committee is included in the Group Member view. Types of committees include UI Involvement or External Involvement.

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It is not possible to edit the constituent's committee membership or role from this view.

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COMMITTEE MEMBERS AND ROLES

HOW TO ADD MEMBERS AND THEIR ROLES

Access to add Committee Members and Roles requires additional training. Contact aims@uif.uillinois.edu for training inquiries.

Committee information is located on a constituent's record under the Relationships tab, Committee subtab. Once the committee has been located, add the member. Membership must include a role. Roles identify how the constituent participated with the committee

Members can be added to a committee:

1. From the committee record
2. Via the committee member load form
3. A submitted file for a mass load process
4. From the constituent record

Committee Dates and Role Dates

Committee dates and role dates are often separate dates. The dates are often different if the constituent has multiple roles within the committee. This flexibility allows units to use dates that are useful for their needs. And identifies the various ways the constituent was active within the committee over the long term.

The dates of the committee membership should include the earliest date, and the latest date of the roles on the committee.

Consistent Date Usage

To help maintain consistency in committee date data, use these guidelines for committee dates:

Award Dates - Start and end date should be the same. Ideally the date the award was given, or 01/01/xxxx with the year the award was given. If the year is unknown, use today's date and note in the comments that the date of the award is unknown.

Student Involvement – 08/01/xxxx to 5/31/xxxx are the dates to use for athletics, bands and other involvement during the school year.

Boards or councils – Dates used should reflect the time of service.

Other committee guidelines - If only one date is known it is best to include that as the start date and leave the end date blank.

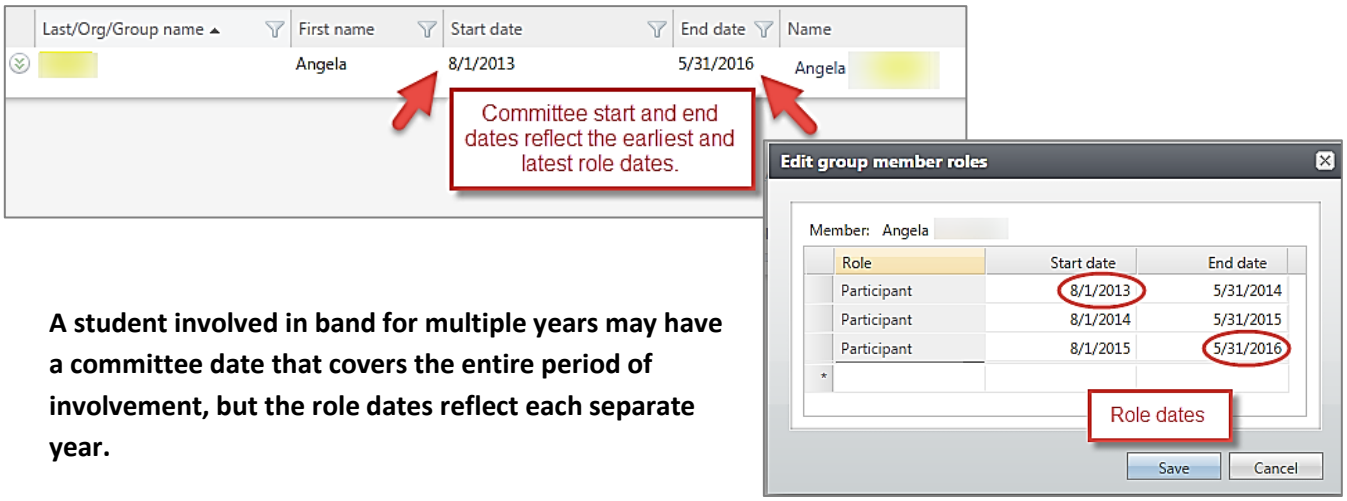
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Unknown Dates – If the date is unknown, use today's date for the start date and leave the end date blank. This can be noted in the comments that the start date was unknown.

For data that was converted from the legacy system a single date was available. Many times, this is the date the record was entered and is not a meaningful date. This caused some dates that are erroneous in TED and should be fixed by all users as identified. The conversion date of 11/11/2015 is also used throughout TED when no other date was available.

Example of when the dates might differ:

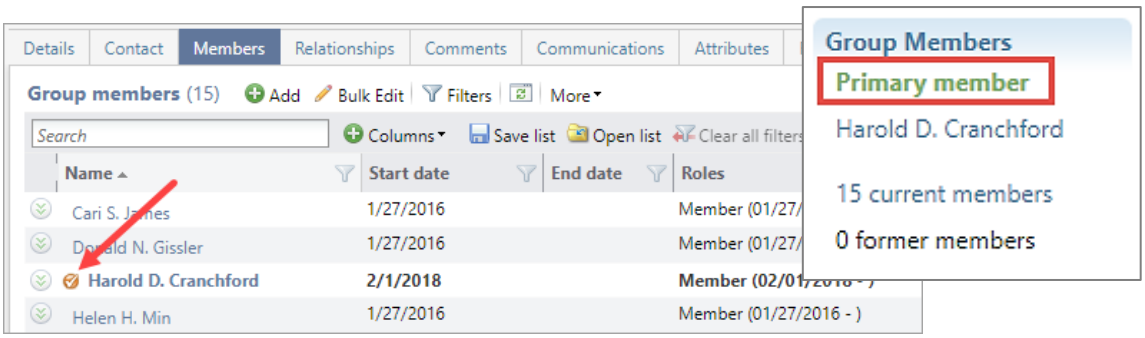


A student involved in band for multiple years may have a committee date that covers the entire period of involvement, but the role dates reflect each separate year.

Primary Member

Committees require a primary member. UIF suggests the staff member responsible for management of the committee be added to the committee in the role of "staff," and then made the primary member, ensuring that those with questions about the committee can immediately find the appropriate Foundation, University, or unit staff member to contact. If this does not occur, by default the first member added to a committee will automatically be marked as the Primary Member. In addition, the first active member to be added, when all other members are inactive, will automatically be marked as the Primary Member.

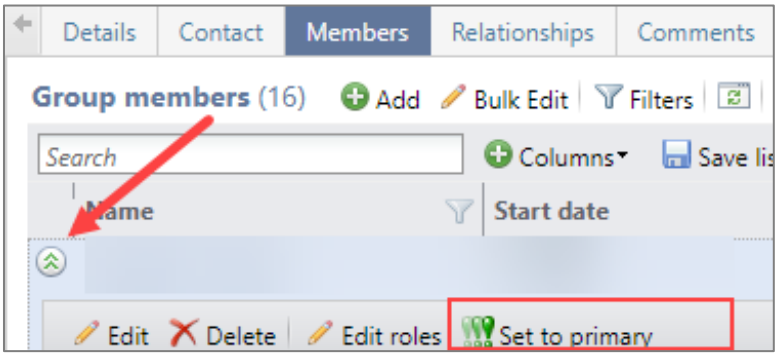
Primary committee members are displayed with a checkmark before their name and listed in the Group Members summary tile.

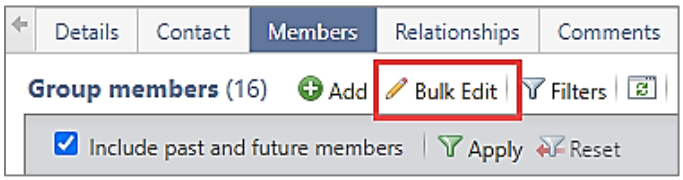


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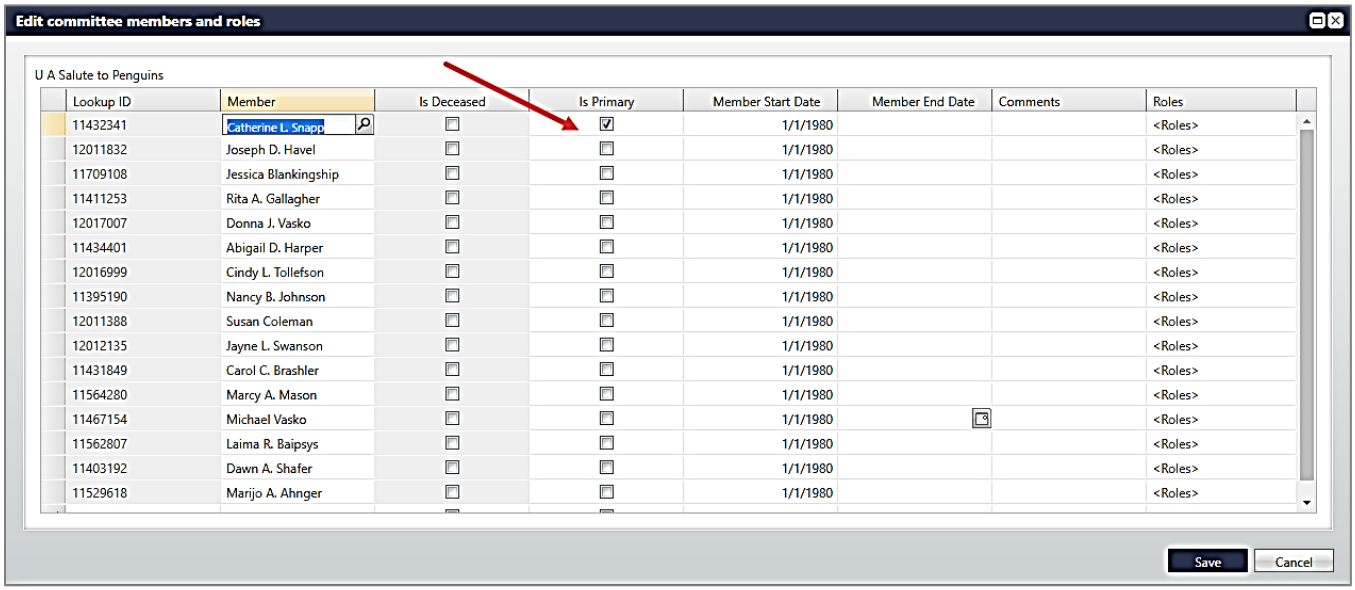
Members with an end date on the committee record cannot be marked as the primary member.

To mark a different member as the primary member, click the double arrows next to the person who should be primary and choose **Set to Primary**.





You can also do this through the Bulk Edit option.

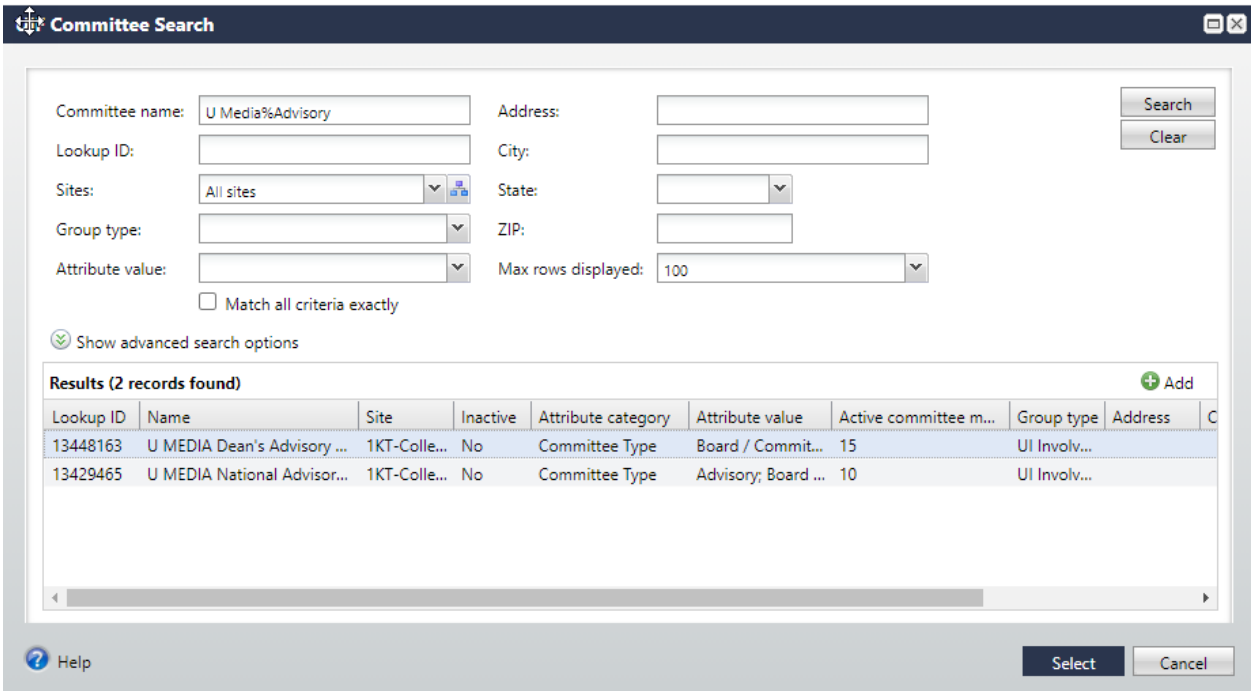


Locating a Committee Record

To open the **committee search** window - click the **Constituents** menu in the blue navigation bar, then the **Committee search** link.

Search for the committee's name, lookup ID, or by site. A wildcard of % can be used to search for partial names.

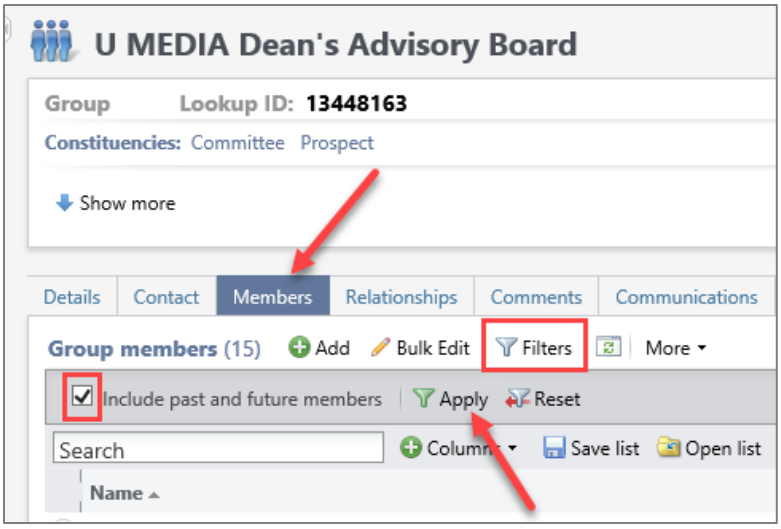
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Click the committee's name to open the committee record.

Add Committee Members from the Committee Record

Once the correct committee record has been located, select the **Members** tab.

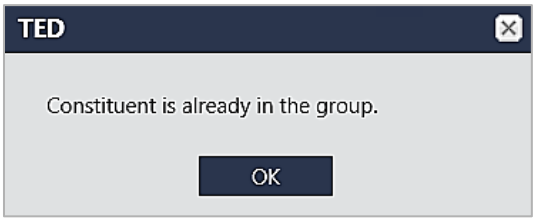


Before adding a member, verify that the member is not already in the committee (on the members tab). If a member has an end date on the committee record, you will need to choose the ***Include previous members*** option to view the member.

Click **Filters**, check **Include previous members**, then **Apply**.

A member can only exist in the committee once. If you try to add a member who is already in a committee, this message is displayed.

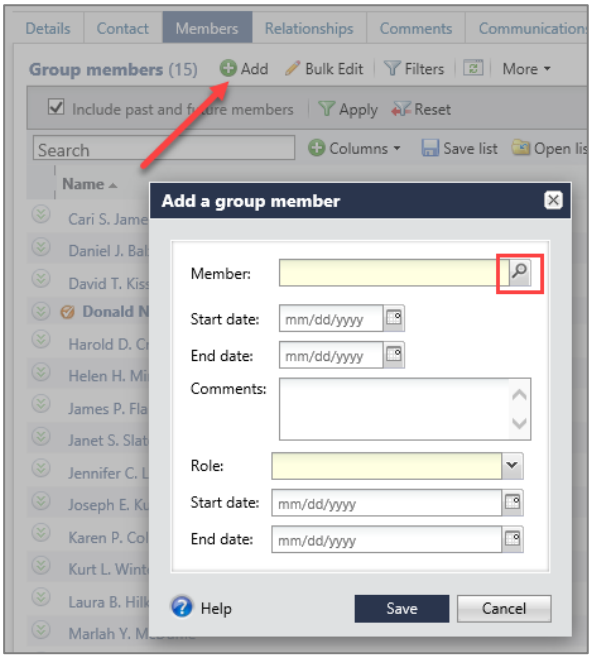
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Select A**dd**, then the **search icon** from the Add a group member window.

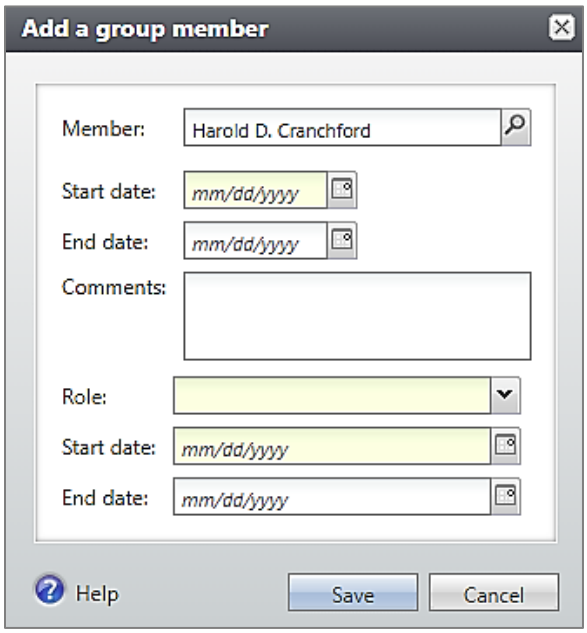
Enter the name, lookup id, or other searchable information for the constituent into the search box. Set advanced search options as shown to narrow your search.

Click on the constituent's name to select the constituent record.



Add the **start date** (required for UI Involvement). This date represents the time period that a constituent is involved with a committee, or if unavailable, use the date you became aware of the involvement.

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The **end date** is optional and represents the date the constituent is no longer involved with a committee, or if unavailable, use the date you became aware the involvement ceased.

The **Comments** field is optional and available if additional information on the constituent is needed. For example: Constituent is highly active in committee activities and actively supports UI fundraising. Noting an entry date as a start date could also be added in this field.

Add the **Role** the constituent has within the committee (required). If no specific role is needed, "member" or "participant" may be used.

Add the role **start date** (required for UI Involvement). This date can represent the time period that a constituent held that role with the committee, or if unavailable, use the date you became aware the constituent took that role.

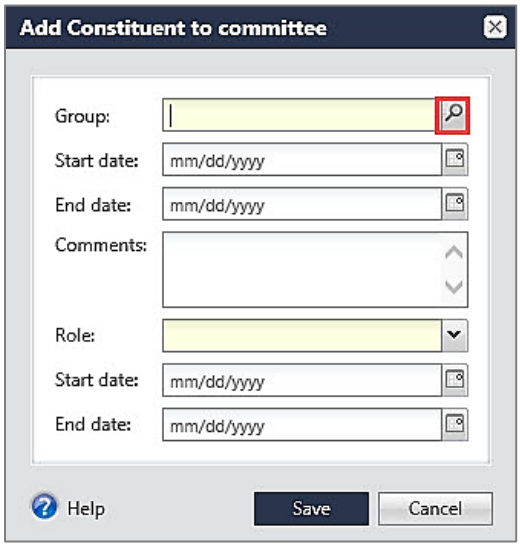
The **end date** is optional and represents the date the constituent is no longer participating in the committee in the same capacity. Or if unavailable, use the date you became aware the involvement ceased. If the specific role has a limited time frame, such as a presidential or board member role, add the expected end date for the role.

Add a Member to a Committee from an Individual Constituent Record.

Search for the constituent of choice. From the **Relationships** tab, **Committees** subtab, click the **Add** button.

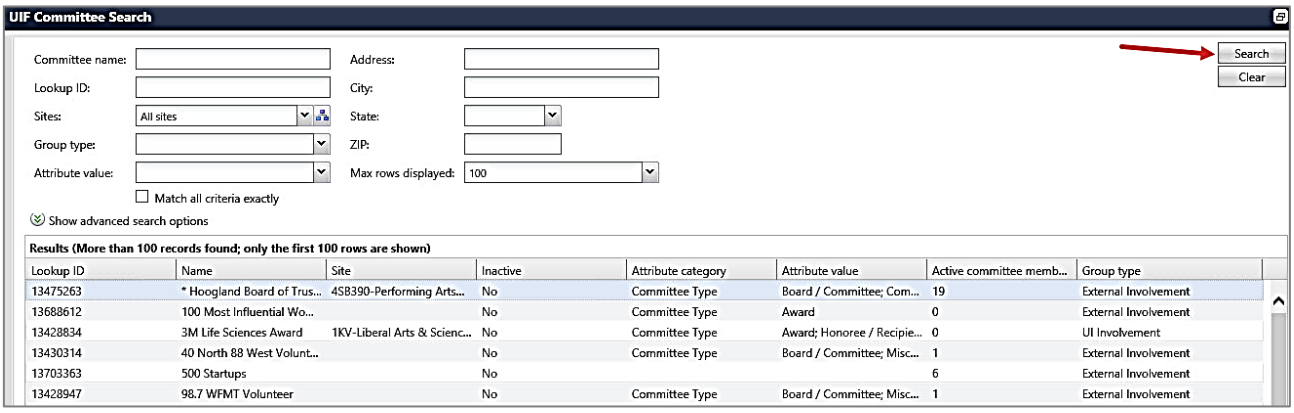


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Click on the **search icon** from the Add Constituent to committee window.

Enter the name, lookup id, or other searchable information for the constituent into the search box. Set advanced search options as shown to narrow your search. Click on the committee's name to select the committee record.



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Note: Definitions for fields are given above under Add Committee Members.

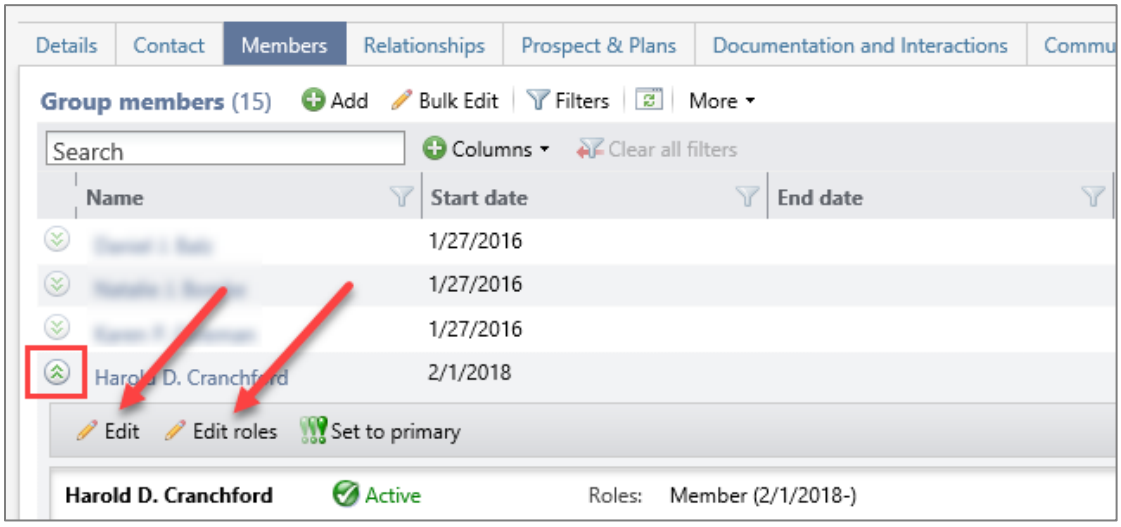


Every constituent on a committee must have a role on a committee. Reports and lists are run using the constituent role on a committee.

Edit a Member from the Committee Record

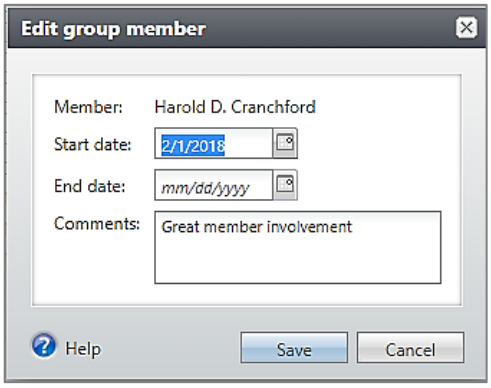
On the Members tab of the Committee record, select the double arrows to the left of the constituent's name.

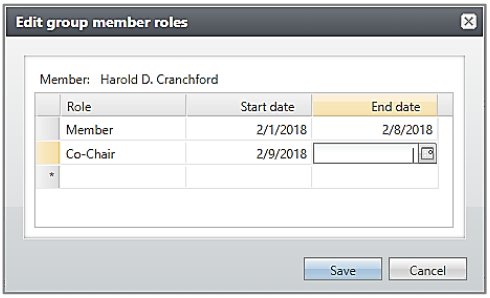
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Selecting **Edit** will open the **Edit group member** window and allow you to change the start and end dates or add a comment.

Start and End dates must encompass role dates. If the constituent has been end-dated, say after receiving an award, the end date must be edited to encompass the new role date. End dating will automatically end date all roles without end dates as well.





Selecting **Edit roles** will open the Edit group member roles window where you can add, edit, or delete group member roles and update the role's start and end dates. Members can hold multiple roles concurrently.

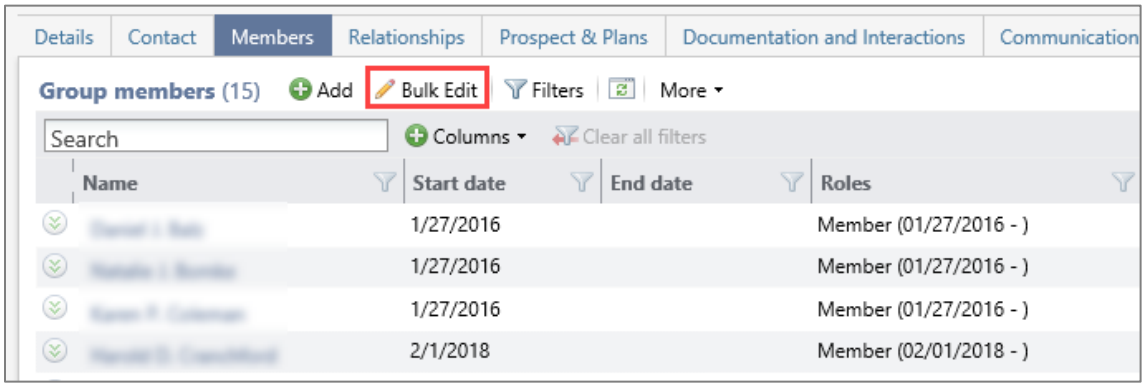
To remove an existing role, click in the box to the left of the role and press the delete key on your keyboard.

Add or Edit Committee Members in Bulk

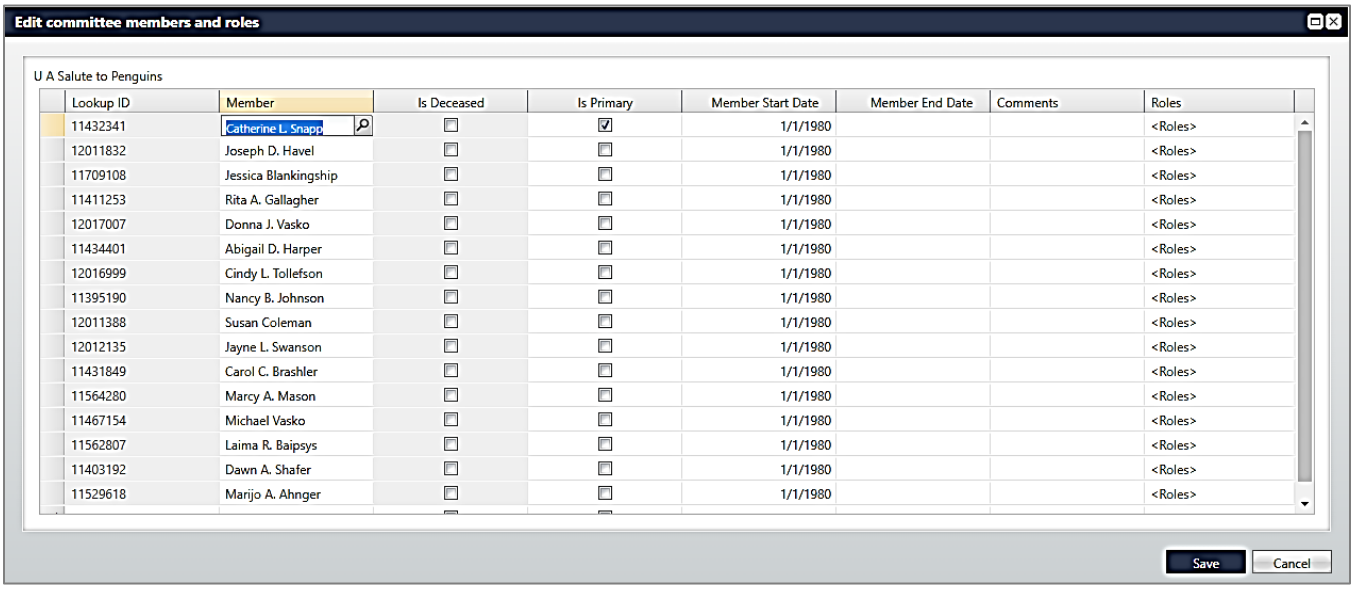
This option can be used for making updates to current members or adding new members to the committee in bulk.

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Begin on the Members tab of the Committee record and click on the **Bulk Edit** button.



This will bring up the complete list of members for the committee.

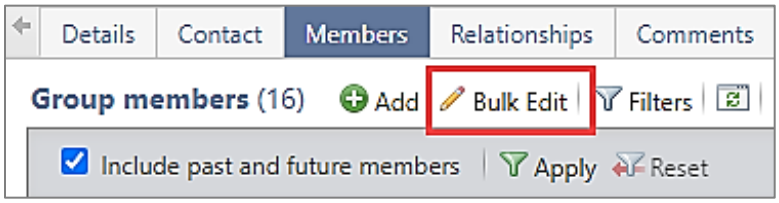


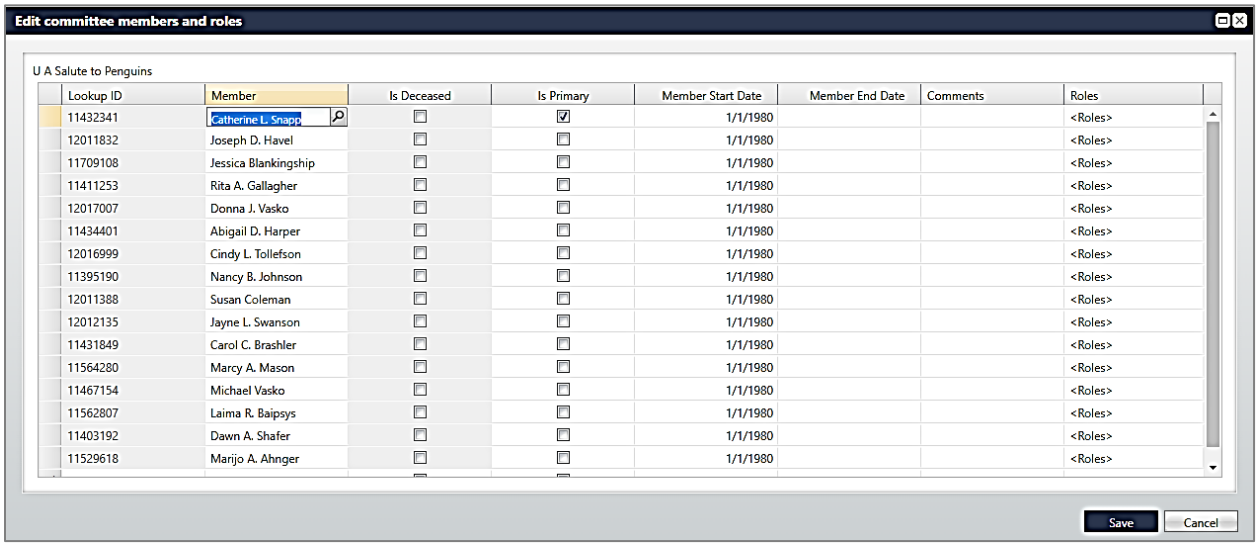
1. Clicking the box to the left of each member, you can edit the following fields: add or remove a comment, edit the Member Start date or add a Role and add/ edit the start date.

2. Clicking on the hour glass for an empty row, allows you to add a committee member. The search box below will pop up and you can search for a member by any of the criteria shown. Once the member is found, click Select.

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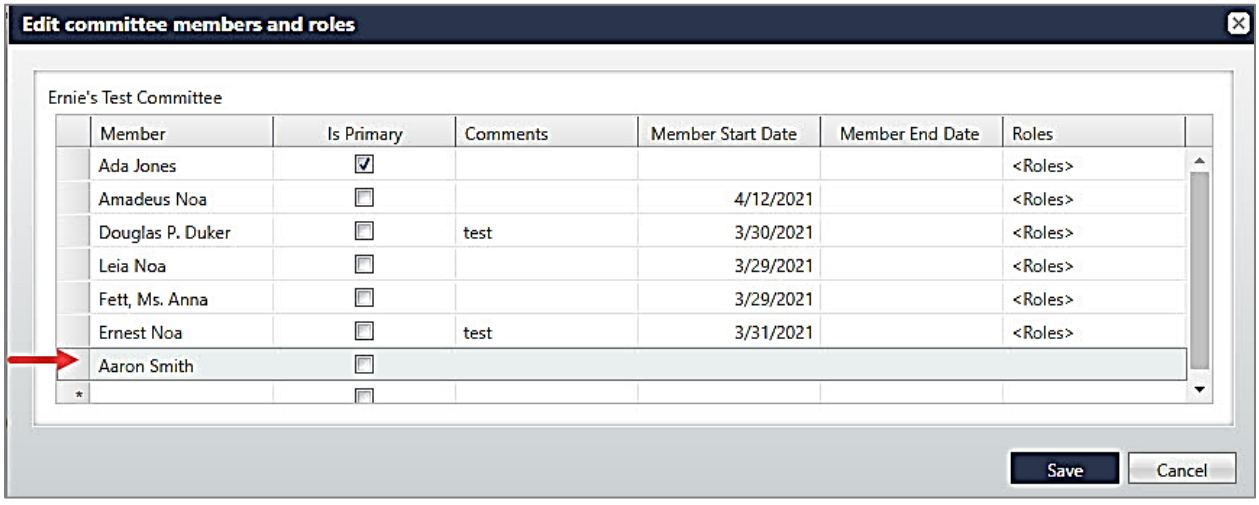
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The new member added will appear at the bottom of the list.

Note: After adding a member, you can edit their member information here, or click save to add start dates and roles on the Member tab.



3. Click Save to go back to the Members tab.

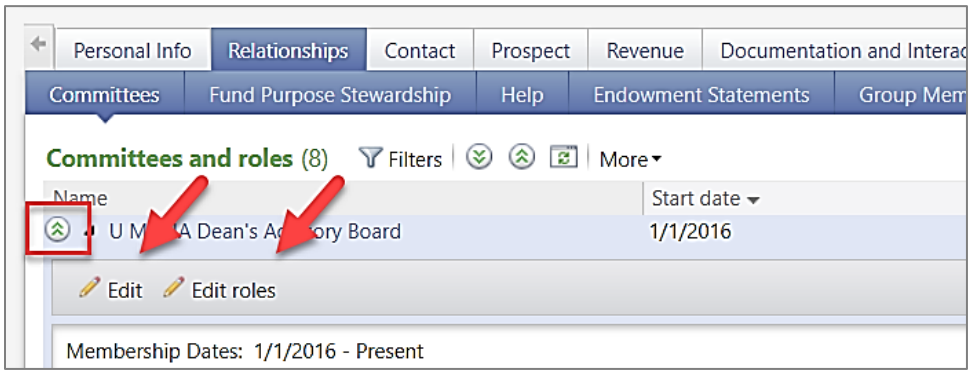
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Edit a Member and/or Roles from the Constituent Record

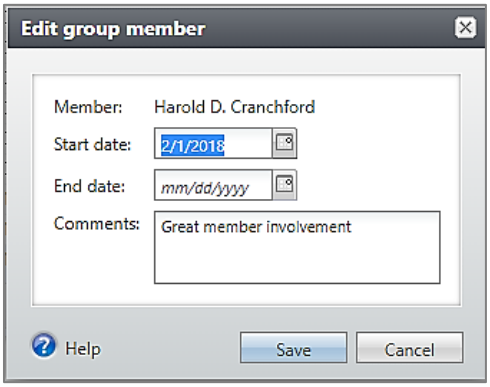
Once a constituent is in a committee, the committee dates, along with role and role dates can be edited from the constituent's individual record.

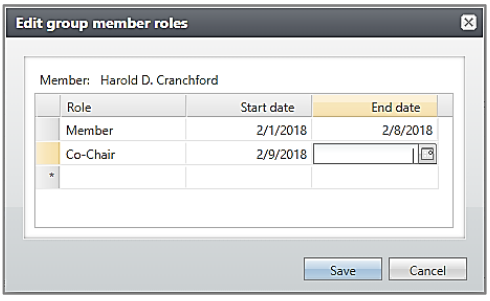
On the constituent record, navigate to the relationship tab, committees sub-tab, and select the double arrows to the left of the committee's name.



Selecting **Edit** will open the **Edit group member** window and allow you to change the start and end dates or add a comment.

Start and End dates must encompass role dates. If the constituent has been end-dated, say after receiving an award, the end date must be edited to encompass the new role date. End dating will automatically end date all roles without end dates as well.





Selecting **Edit roles** will open the Edit group member roles window where you can add, edit, or delete group member roles and update the role's start and end dates.

To remove an existing role, click in the box to the left of the role and press the delete key on your keyboard. Members can hold multiple roles concurrently.

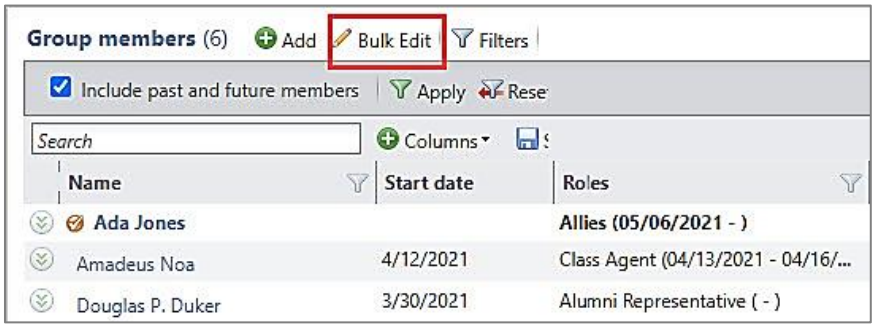
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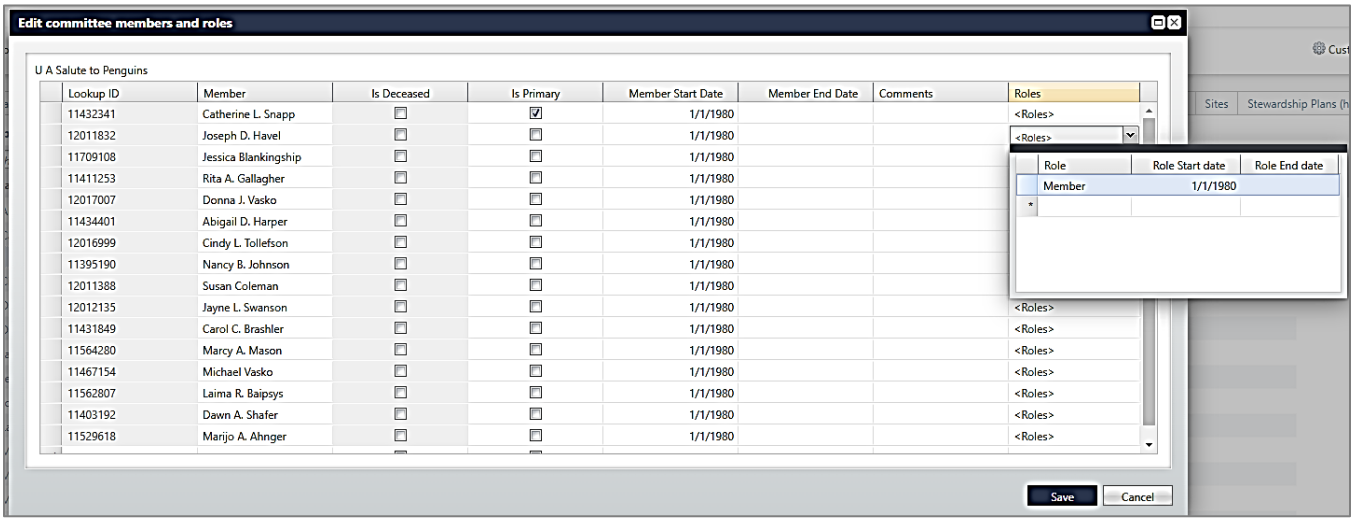
Add or Edit Committee Roles in Bulk

This option can be used if updating existing roles or adding new roles to multiple members.

Select the **Bulk Edit** button



Click in the roles column to open a pop out window listing any roles already attached to the member. From this screen you can edit a role or add additional roles to any member. To remove an existing role, click in the box to the left of the role and press the delete key on your keyboard.



Best Practices for Role Selection

A constituent can have multiple roles on a committee but must have at least one role. If there is no specific role known use the following guidelines:

Member - Can be used if there is no known specific role
Participant – Used for athletics, bands or student clubs or groups
Recipient – Used for awards
Other roles – Many other roles are available in the drop-down list. For more information on role definitions contact AIMS. Units that require additional roles can request these be added by contacting AIMS directly.

REVIEWED 8/7/24

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COMMITTEE ROLE DEFINITIONS

FOR COMMITTEE MEMBERS

⚠ *Known issues and in-progress/pending projects related to this documentation are identified in footnotes.*

Role[1]	Category	Description
Chair	Leadership	An elected or appointed position within a board or committee, typically used to indicate the person leading that group during a particular term. See also President.
Chair Elect	Leadership	An elected or appointed position within a board or committee, typically used to indicate the person slated to lead that group during an upcoming term. See also President.
Co-Chair	Leadership	An elected or appointed position within a board or committee, typically used to indicate the multiple persons leading that group during a particular term. See also Co-President.
Co-President	Leadership	An elected or appointed position within a board or committee, typically used to indicate the multiple persons leading that group during a particular term. See also Co-Chair.
Declined Membership	Recruitment	Identifies constituents who have been invited to participate in a particular board or committee but who have declined to participate. This attempted engagement is retained as historical information on the constituent's record and provides for the engagement manager a full view of current, past, potential, and declined membership for a particular board / committee. See also Prospect, Member. (NOTE - 109 instances; mostly on campaign committees and UIF Foundation Membership)
Director	Leadership	Identifies constituents who participated in a particular Board of Directors, in which the members of the board are specifically called Directors rather than Members, i.e. the UIF Board. This engagement is retained as historical information on the constituent's record and provides for the engagement manager a full view of current, past, potential, and declined membership for a particular board / committee. See also Prospect, Declined Membership.
Ex-Officio Member, Non-Voting	Leadership	A constituent who participates in committee / board's activities or meetings but is not otherwise a member of said committee and does not vote. (NOTE - Prompted by the University of Illinois Foundation Board changes to bylaws, effective October 12, 2017, around Board Committees. Current Board Chair, for example, serves as Ex-Officio on all committees and can vote, while certain staff (UI and UIF Presidents and others) serve as Ex-Officio but do not vote.)

[1] The list of roles and definitions is not yet finalized.

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Ex-Officio Member, Voting	Leadership	A constituent who participates in committee / board's voting activities or meetings but is not otherwise a member of said committee. (NOTE - Prompted by the University of Illinois Foundation Board changes to bylaws, effective October 12, 2017, around Board Committees. Current Board Chair, for example, serves as Ex-Officio on all committees and can vote, while certain staff (UI and UIF Presidents and others) serve as Ex-Officio but do not vote.)
Fellow	Award	The highest grade of membership conveyed by a professional or learned society, it is an honor that signifies outstanding achievement in one's field. (NOTE - Typically used for external involvement.)
Immediate Past Chair	Leadership	The immediate term after being the Chair when the Immediate Past Chair has an official role with the organization. Not to be used to indicate previous chairs, as that can be addressed with end dates on the Chair role.
Immediate Past President	Leadership	The immediate term after being the President when the Immediate Past President has an official role with the organization. Not to be used to indicate previous chairs, as that can be addressed with end dates on the President role.
Legal Counsel		Constituent who serves as counsel for a particular organization or board. Most often used for technical or governing boards, where that person may or may not also be an employee of the organization (NOTE - two people have this role and on committee UIF Foundation Board)
Life Director	Foundation Board	Members of the UIF Board who have served their director role with distinction are invited to join the class of life director. Life members are invited to participate in UIF Board and committee meetings.
Member	General Participation	Identifies constituents who participated in a particular board or committee. This engagement is retained as historical information on the constituent's record and also provides for the engagement manager a full view of current, past, potential, and declined membership for a particular board / committee. See also Prospect, Declined Membership.
Mentee	Mentoring	A person who is advised, trained, or counseled by a mentor
Nominee	Award	A person identified as a potential recipient for an award or position
Other		To be used to indicate a role beyond the typical "Member" role that is not otherwise listed as an option. Comments should be added as well to indicate the role that constituent held. These "Other" roles will be reviewed annually to determine if new roles should be created (NOTE - there are 7 instances of these; Leave for now. Can be used for unusual roles that will be used infrequently.)

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Presence	Research Park	Identifies primary organizations where a subsidiary is a tenant at Research Park in Urbana, DPI in Chicago, etc. (NOTE - In other words, the company has some representation (or presence), but this particular organization is not the tenant. Caterpillar has a presence at Research Park, but the headquarters / primary record is not the one housed at Research Park.)
President	Leadership	An elected or appointed position within a board or committee, typically used to indicate the person leading that group during a particular term. See also Chair.
President-Elect	Leadership	An elected or appointed position within a board or committee, typically used to indicate the person slated to lead that group during an upcoming term. See also Chair-Elect.
Prospect	Recruitment	Identifies constituents who have been invited to participate in a particular board or committee but who have declined to participate. This attempted engagement is retained as historical information on the constituent's record and provides for the engagement manager a full view of current, past, potential, and declined membership for a particular board / committee. See also Prospect, Member.
Recipient	Award	Received an award or prize from the committee
Secretary	Leadership	A person of the organization who conducts its correspondence and keeps its records
Secretary-Treasurer	Leadership	Constituent who serves in a combined role that provides duties as both the secretary and treasurer of an organization during the same term. (NOTE - Often used for smaller organizations or organizations where filling leadership positions is more difficult.)
Tenant	Research Park	Identifies organizations with a presence at Research Park in Urbana, DPI in Chicago, etc.
Treasurer	Leadership	A person appointed to manage the financial assets and liabilities of a society or other body
Trustee	Leadership	A constituent who sets aside property to be used for the benefit of another person, to manage the property as provided by the terms of the document that created the arrangement.
Varsity I Letter Winner	Athletics	Varsity letter winners for Urbana-Champaign Division I athletic teams (NOTE - this role needs to be mass changed to Varsity I)
Vice Chair	Leadership	A person who is designated as immediately subordinate to a Chair and serving as such in the latter's absence.
Vice President	Leadership	A person next in rank to President who serves as a deputy to the President
Volunteer	General Participation	A person who voluntarily offers himself or herself for a service or undertaking (NOTE - Most often used with External Involvement where "membership" is not required. For example, constituent volunteers with Big Brothers Big Sisters)

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COMMITTEE MEMBER MASS LOAD

MEMBERS CAN BE LOADED FOR YOU

Submit a File for Committee Mass Load Process

For users with large number of committee members to add, a batch import process is available by submitting a file using the Committee Member Load Request form available in TED. The specifications for the file are listed here. Following this format will ensure accurate results and a timely turn-around.

Files supplied with TED or UIN lookup ID will be processed in 10 days. If the lookup ID is not available, please allow up to 30 days for your committee file to be loaded.

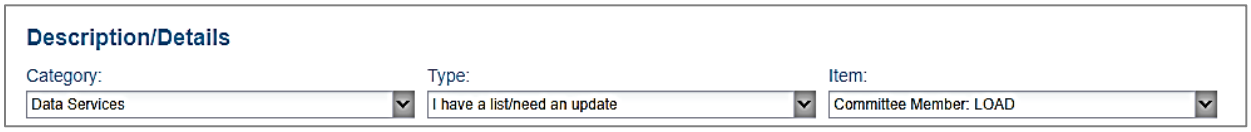
File discrepancies or exceptions may extend the time needed for the committee member load process. If you require a shorter turn-around time or have any questions, please contact aims@uif.uillinois.edu. Please see the template below.

Col	Column Heading Required (row 1)	Required Optional	Description
A	AlternateLookupID	Col A or Col C is required	Valid lookup ID based on the type in column B.
B	AlternateLookupType	Required if col A is supplied	Valid types include: CAMPUSCALL ID, Char Master ID, EDW, FACTSID, FACTSLogon, Grants and Contracts, Merged TED ID, Paciolan - DIA, Paciolan - Krannert, Ticker, UIAN, UIF Security ID, UIN, Vet Med ID - Chicago, Vet Med ID - Urbana
C	ConstituentLookupID	Col A or Col C is required	This is the TED Lookup ID. If left blank, this process will fill in.
D	LastName	not used	Used for reference only, not updated by batch import process
E	FirstName	not used	Used for reference only, not updated by batch import process
F	ConstituentType	required	Individual or Organization
G	CommitteeLookupID	required	Must be a valid committee lookup ID
H	CommitteeName	required	Must be a valid committee name
I	MemberEndDate	not used	Not used, date is copied from latest role end date
J	IsPrimaryMember	required	Always No
K	Member Comments	optional	300-character limit
L	Role	required	Must be one of valid role types listed. Recipient is used for awards, participant is used for athletics, and member can be used if no specific role.
M	Role Start Date	required	Date format i.e. 3/15/2017 (future dates allowed)
N	Role End Date	optional	Date format i.e. 3/15/2017 (future dates allowed)

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Submit the formatted excel file by logging in to UIF Support using the link https://support.uif.uillinois.edu and choose the options below. This will create a ticket, and you will receive notification when the load is complete.



REVIEWED 7/11/25

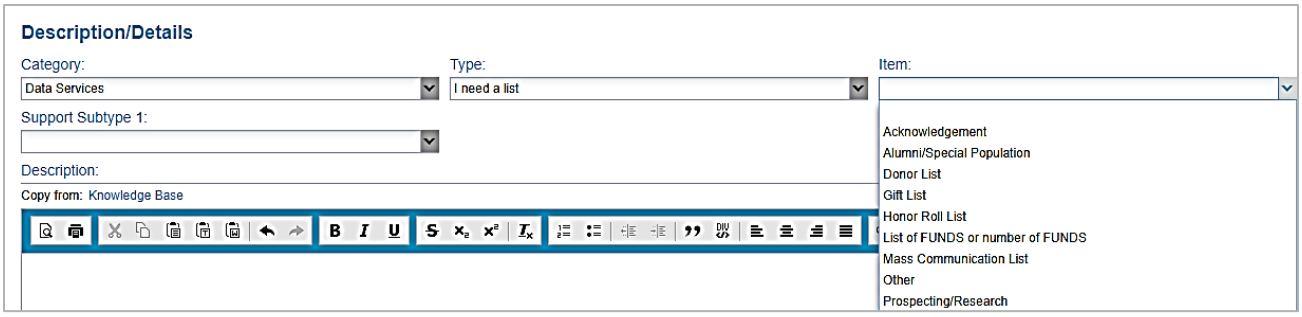
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COMMITTEE REPORTS

MEMBER LIST EXPORT

Committee reports are limited to -

- Committee members list exported from the committee record.
- Query templates are available for users with Query access.
- Ad Hoc lists can be requested by logging in to UIF Support using the link https://support.uif.uillinois.edu and choosing the options from the template below.



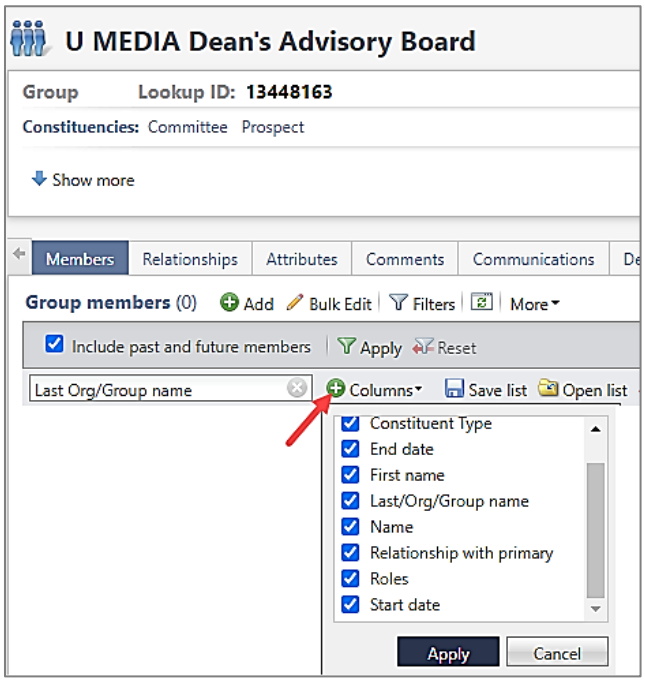
Committee Member List Export

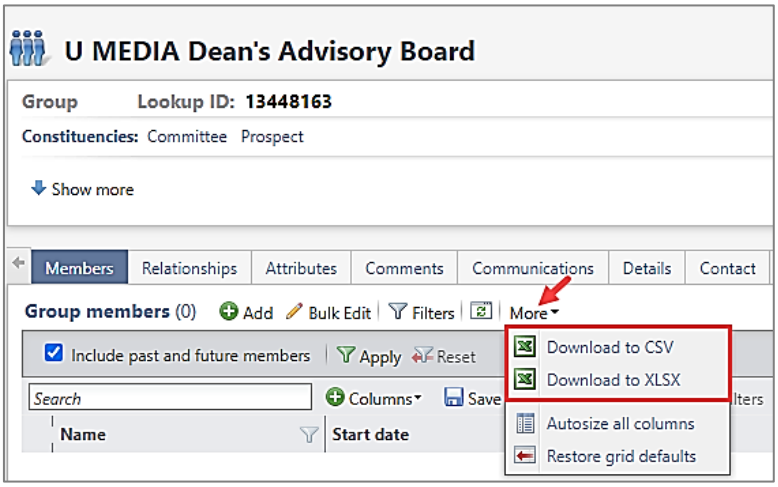
A list of committee members can be exported from the committee record.

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Before exporting, columns to include in your export can be added or removed by selecting the **column** option from the committee record. Check or uncheck the columns to include in the export, then click apply.

NOTE - Roles and role dates are not an option to include.





To export, click the **More** option from the committee record. Choose the option to Download to CSV file or Download to XLSX.

The Save As window will allow you to name and save the file in a convenient location.

REMINDER – Committee lists should not be used for mass communication. Mass Communication lists can be requested under UIF Help in TED.

REVIEWED 12/6/24

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REVENUE TAB

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CONTACT PUBLICITY CODE

OVERVIEW AND USE

The Contact Publicity section on the Revenue History tab is available to any TED user that has access to the Revenue History tab on constituent records. The Contact Publicity Code is an attribute added during the gift process and can only be added, deleted or modified by UIF Gift Processing (giftprocessing@uif.uillinois.edu). Users who are unable to view the Contact Publicity section on the Revenue History tab should contact UIF AIMS (aims@uif.uillinois.edu) for information on how to obtain access.

There are four options for notating a donor's preference related to anonymity, contact or publicity for a transaction.

- Anonymous
- No Contact
- No Publicity
- No Contact/Publicity

Transactions that have a Contact Publicity Code should easily be identifiable without having to click the details of each transaction in the donor's Revenue History.

Publication, Recognition, or Reference Anonymity, Publicity or Contact

Gifts, Pledges and Recurring Commitments

If the donor requests the transaction be anonymous, not publicized and/or no contact made with the donor regarding the transaction, the gift, pledge or recurring commitment will be credited to the donor's record and an appropriate Contact Publicity code will be added to the transaction. These gifts, pledges and recurring commitments will be included in the donor's total household giving. This will be visible (on the UI Household Giving sub-tab) but will not be included in the donor's total giving for any honor rolls or recognition. Utilize the No Publicity/No Contact field on the gift transmittal to indicate a donor's preference that a gift, pledge or recurring commitment should be recorded with a Contact Publicity Code.

Planned Gifts

If the donor requests the planned gift be anonymous, not publicized and/or no contact made with the donor regarding the transaction, the gift, pledge or recurring commitment will be credited to the donor's record and an appropriate Contact Publicity code will be added to the transaction. No

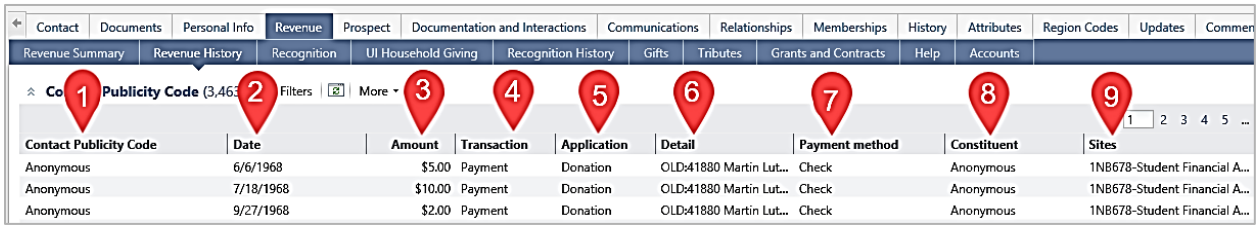
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publication, recognition or reference to the planned gift should be made. The planned gift will be included in the donor's total household giving (on the UI Household Giving sub-tab) but will not be included in the donor's total giving for any honor rolls or recognition. Share the donor's request for a planned gift to remain anonymous, not publicized and/or no contact made with the donor about the Planned Gift in the communication process with UIF Gift Planning and Trust Services. This will ensure that the planned gift transaction is recorded with an appropriate Contact Publicity Code.

Contact Publicity Code section on the Revenue History tab

Certain fields of information about the transactions that have a Contact Publicity Code will appear in a section above the Revenue History section on the Revenue History tab of the constituent record in TED. If no information is displayed, the constituent will have no transactions with a Contact Publicity Code. There is no ability to click to the details of the transaction from the information in the Contact Publicity Code section.

The Contact Publicity attribute is located on the Revenue History sub tab under the Revenue tab for the Individual or Organization constituent record.



1. Contact Publicity Code- The code added to the transaction displaying one of the following (Anonymous, No Publicity, No Contact or No Contact/Publicity).
2. Date- The date the transaction was received by UIF for processing.
3. Amount – The $ amount of the transaction.
4. Transaction – The transaction type of the respective transaction.
5. Application – The Application of the respective transaction.
6. Detail – The designation and lookup ID of the transaction.
7. Payment method – The method of payment for the transaction.
8. Constituent – The name of the constituent or can be anonymous.
9. Sites – The site and description of the benefitting unit(s) for the transaction.

Note: If additional information is desired for the transactions noted in the Contact Publicity Code section, locate the transaction in the Revenue History section and click on Gift.

Comprehensive Anonymity

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Gifts and Pledges

If the donor wishes to remain anonymous to everyone, this information should be conveyed with the gift or pledge so that the transaction is recorded appropriately in the donor database. The gift or pledge will be credited to the Main Anonymous record (EX: TED ID 10426738). In this situation, no one can look at the database and know the origin of the gift or pledge. No individual donor credit is issued using this method. The transaction will not be included in the UIF Household Giving sub-tab, honor roll or donor list.

Planned Gifts

If the donor wishes to remain anonymous to everyone, this information should be conveyed to UIF Gift Planning and Trust Services with information about the planned gift so it may be recorded appropriately in the donor database. In this situation, no one will be able to look at the database and know the origin of the planned gift. No individual donor credit is issued using this method. The transaction will not be included in the UIF Household Giving sub-tab, honor roll or donor list.

REVIEWED 1/9/24

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CROWDFUNDING

HIGH LEVEL OVERVIEW

Background Information

The vendor selected by the University of Illinois Foundation for crowdfunding services is Community Funded.

Each University has their own site for crowdfunding and includes unique processes and policies for determining which campaigns will be added to the respective University site. Questions regarding crowdfunding efforts can be directed to Meredith Howell or Ramona Maza (UIC), Kristin Burnette or Rachel Hull (UIUC), Ashley Earnest or Lisa Whelpley (UIS).

Any other inquiries (not University related) or additional ideas for use of the functionality that Community Funded provides (i.e., creating an additional site within the environment), should be coordinated with UIF by communicating with creditcardsignup@uif.uillinois.edu.

University Crowdfunding Sites

The main Chicago site can be accessed via this link http://flamesfunded.uic.edu/

Additional information about the process, policies and contacts for the FlamesFunded site are available through the links at the top of the site.



There are several other crowdfunding sites for UIC including one for Giving Tuesday.

The Giving Tuesday site is used each November/December in concert with Giving Tuesday, the first Tuesday after Thanksgiving.

Location of the site https://givingtuesday.uic.edu/

The main Springfield site can be accessed via this link http://crowdfunding.uis.edu

Additional information about the process, policies, and contacts for the UIS site are available through the links at the top of the site.



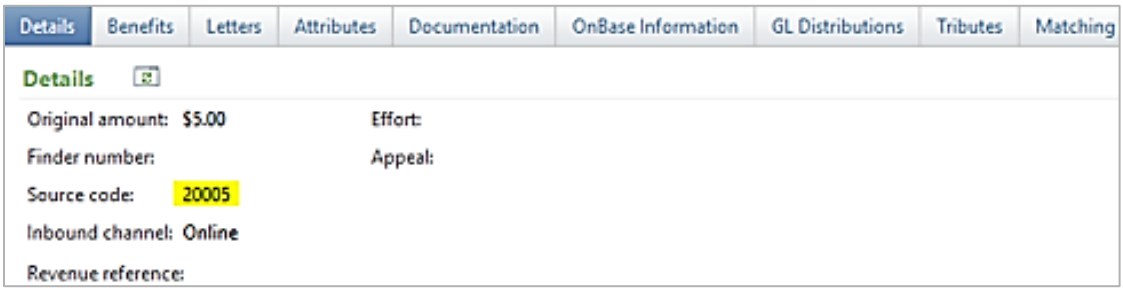
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The main Urbana site can be accessed via this link https://with.illinois.edu/2281867-2/

Additional information about the process and policies and contacts for the UIUC site can be obtained from Rachel Hull or Kristin Burnette.

Source Codes

Each University and the Giving Tuesday crowdfunding site has been assigned a unique source code. This source code will automatically flow into the Source code field through the batch to the transaction in TED.



- Source codes for Chicago are 20005, 20046, 21059, 21060, 21065, 21067, 21068, 21078, 22000-22100
- Source code for Chicago Giving Tuesday is 21056
- Source codes for Springfield are 40009, 40029, 42000-42100
- Source codes for Urbana are 10245, 10492, 10559, 10561, 12000-12100
- Source Code for U of I Foundation (test transactions only) is 90020

There is no other distinguishing data or criteria for transactions that originate through the crowdfunding sites other than these unique source codes. These transactions will look like Online credit card transactions in all other respects.

As with all online giving efforts, courtesy email confirmations are provided for each University crowdfunding site. However, as there is only one source code for each crowdfunding site, there is no way to have different recipients for each campaign on a respective crowdfunding site. The email addresses that receive the courtesy email notifications are determined by each University.

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Campaigns

The respective University crowdfunding site can have many campaigns, or opportunities to give.

On the respective site, or on a mobile device, the donor selects the campaign they wish to support by tapping the button indicating Donate Now or other invitation to give or tapping the campaign for more information.



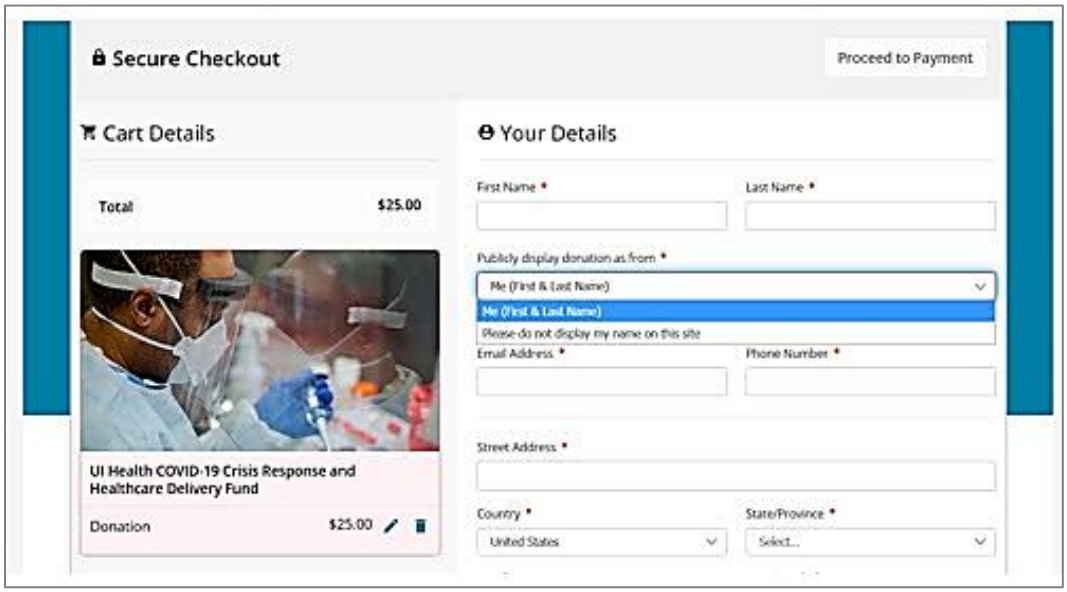
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From a mobile device.

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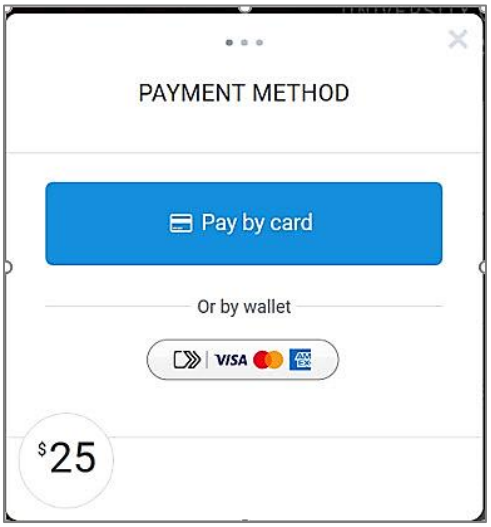
The page below provides the details of the gift and the fields to complete for name, address, etc. Please note that only outright gifts are available. There is no ability to create a recurring commitment.



Please note the 'Publicly display donation as from' option allows the donor to select 'Please do not display my name on this site.' By selecting this option, the donor will be listed as anonymous on the list of donors for the campaign on the Crowdfunding site. This information is not sent to UIF with the gift (nor can it be). This donor will not be listed as anonymous in TED, just on the campaign list of donors on the Crowdfunding site.

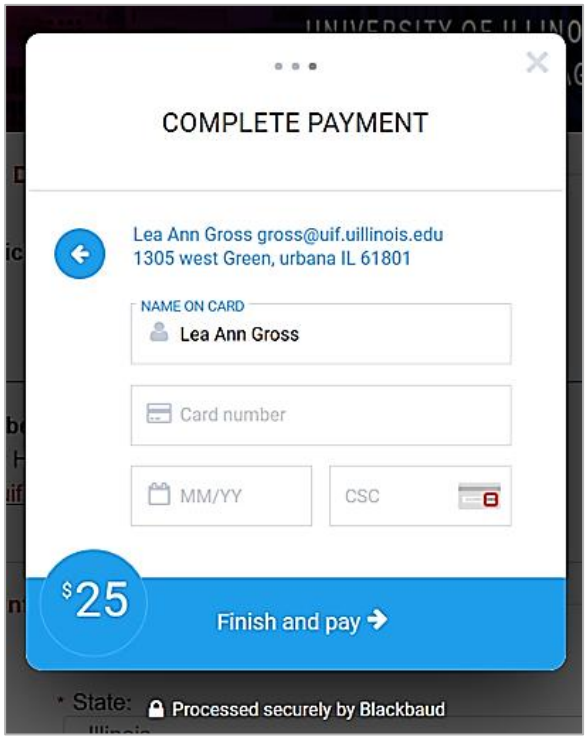
After the donor completes the information and clicks Proceed to Payment. If their address is in the United States, the checkout box will appear.

The donor clicks Pay by card /Or by wallet option. The Checkout page and the pages that follow are not customizable beyond what is already showing. If the donor is on an Apple device, with Apple Pay enabled, Apple Pay will also be an option. If the donor is on an Android device, with Google Pay enabled, Google Pay will also be an option.



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If the donor is from a country outside the United States, the donor will stop on the UIF payment page to complete the international address information. The donors are then directed to the Checkout page by clicking Continue.



The donor clicks Finish and pays to submit the gift. The donor receives the same online confirmation of the gift as when using other UI online giving sites. The donor also receives an email confirmation of the gift as when using other UI online giving sites.

As with all online giving efforts, courtesy email confirmations are provided for each University crowdfunding site. However, as there is only one source code for each crowdfunding site, there is no way to have different recipients for each campaign on a respective crowdfunding site. The email addresses that receive the courtesy email notifications are determined by each University.

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Once the gift is complete, information is sent back to the campaign on the crowdfunding site that updates the number of donors and amount of gifts to the campaign.



Campaign Options

If a donor would like to see a list of other donors, additional information about the campaign, etc., return to the crowdfunding page and click the campaign. The areas of Community (list of donors), Challenges Matching Gifts, and Story Updates provide additional information. These section names are customizable, so may appear differently on each respective University crowdfunding site.



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Each campaign can be shared via email or a variety of social media options.

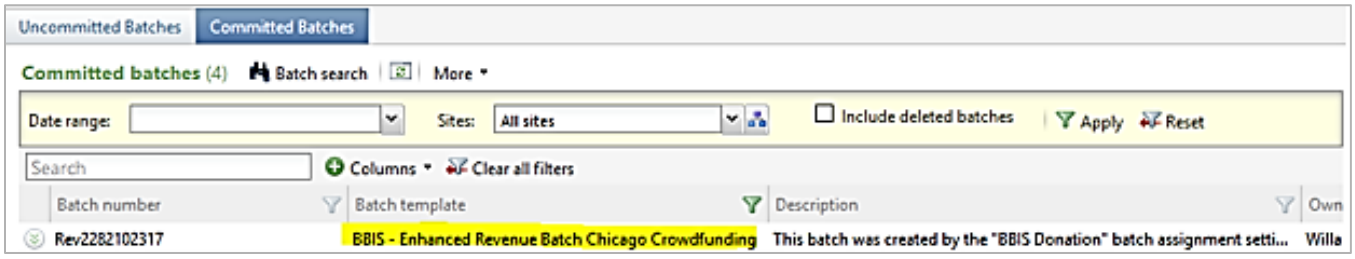


Campaign Management

Each University will manage its own crowdfunding site. Campaigns will be removed from active status on the schedule determined by each University.

It is possible for a campaign that is past the end date noted to accept gifts if the campaign has not been deactivated by the respective University.

These transactions will download in CRM (TED) every 5 minutes to a BBIS crowdfunding batch. A separate batch is used for each University.



Note: The normal turnaround time for processing/committing gifts at UIF is 24-48 hours, often this is the same day. This may stretch to 48-72 hours during the busy season (Thanksgiving – middle of January).

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Troubleshooting

Sharing a link to a campaign or giving site via Facebook can cause the transaction to lose identifying criteria when completed. The source code and/or designation may not appear on the transaction in the gift batch. If transactions missing one or more of these details appear in the respective University crowdfunding gift batch, Gift Processing will follow up with the donor to determine the designation, etc.

UPDATED 7/27/23

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MANAGING UNIT GIFT ACKNOWLEDGEMENTS IN TED

A GUIDE FOR IMPORTING & TRACKING UNIT GIFT ACKNOWLEDGEMENTS IN TED.

Acknowledging the gifts of donors is an essential and impactful part of the stewardship process. In turn, it is important to be able to confirm that gift acknowledgements have taken place and track the timeliness and consistency with which they are happening. After you send out gift acknowledgements via your EGAD Report, you can follow the steps below to use data from that report to bulk upload your gift acknowledgements in TED.

To begin this process, you will need to add data from your EGAD Report utilizing the CSV File Template. The link for the template can be found here - https://uofi.box.com/s/ri6snlbdhp0sryplvqz8gr9eroe1s0a5

Note: **Units are responsible for importing gift acknowledgement information for CAP cards. Please make sure you pull your exceptions report and include CAP cards in your file upload. Use your information for the SenderID, your unit for the SiteID, and add a comment that the card was sent by OVCIA (see Comments field #6 below for example).**

The CSV File Template includes the following fields:

1	2	3	4	5	6
RevID	DateAcknowledged	Method	SenderID	SiteID	Comments
rev-16966150	9/11/2023	Email	11139894	1NS280-Ofc VC Inst Advancement	TEST
rev-16965802	9/11/2023	Email	11139894	1NS280-Ofc VC Inst Advancement	Test 2
rev-16966107	9/11/2023	Email	11139894	1NS280-Ofc VC Inst Advancement	Test 3
rev-16965382	9/11/2023	Email	11139894	1NS280-Ofc VC Inst Advancement	Test 4
rev-16965742	9/11/2023	Email	11139894	1NS280-Ofc VC Inst Advancement	Test 5

1. **RevID –** This field serves as an identifier and connects the gift to the donor.
2. **DateAcknowledged –** This field captures the date when the gift acknowledgement was initially sent and uses the format MM/DD/YYYY.
3. **Method –** This field indicates how the gift acknowledgement was sent over with options of Mail, Email, Phone call, In Person or CAP Card.
4. **SenderID –** This field is the TED Lookup ID of the person responsible for recording the gift acknowledgement.
5. **SiteID –** This field is the specific site for your unit and must match exactly.
6. **Comments –** This field is intended for short comments, no more than a couple of sentences. Examples: For CAP Cards you can add “OVCIA sent on behalf of unit” or to identify who made the phone call, such as “Dean called donor to thank them for gift.”

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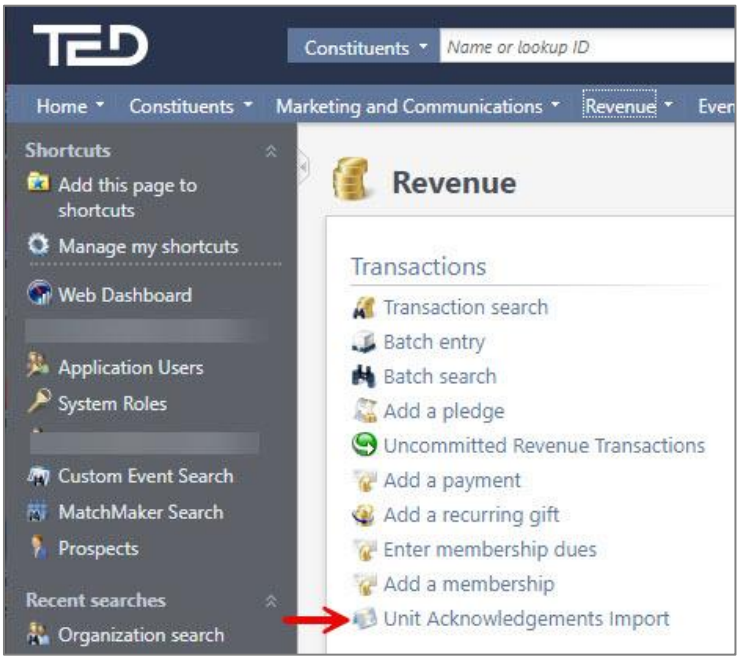
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Notes to remember:

- Use the CSV File Template provided.
- Do not change any of the headings.
- Use a unique and descriptive name for the file. Incorporate a date/time and reference any other pertinent information that can aid in troubleshooting.
  Ex: DonorAcknowledgments_20231220.csv
- Populate the fields with your gift acknowledgement data.

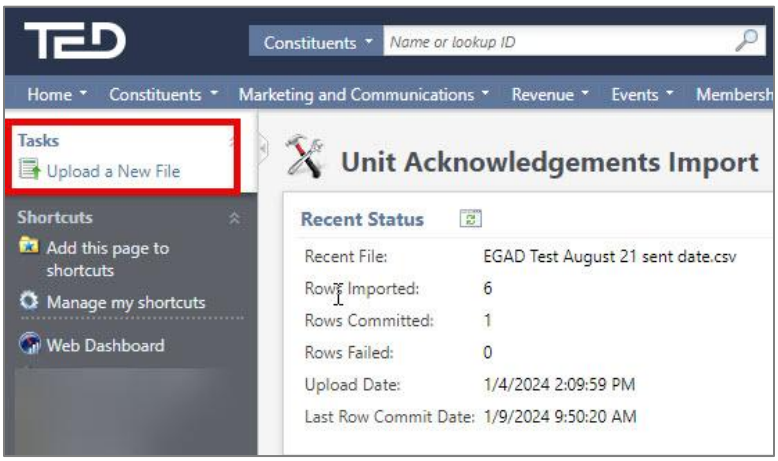
Accessing the Self-Service Area

Navigate to the Revenue area in TED and click on "Unit Acknowledgements Import."



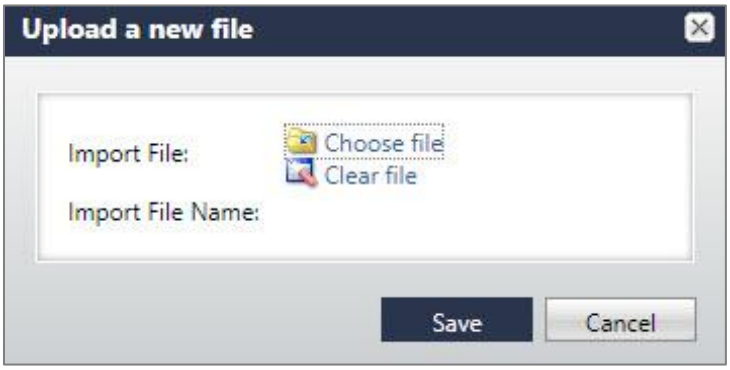
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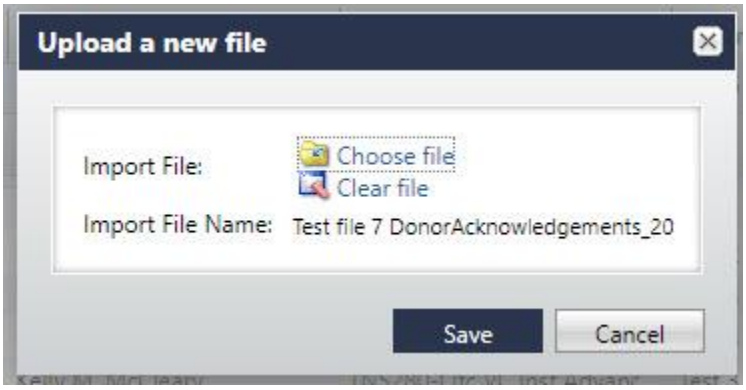
Uploading Gift Acknowledgement Data



On the left navigation menu under Tasks, click Upload a New File.

Click on Choose file and select the relevant .CSV file(s) from your local system.





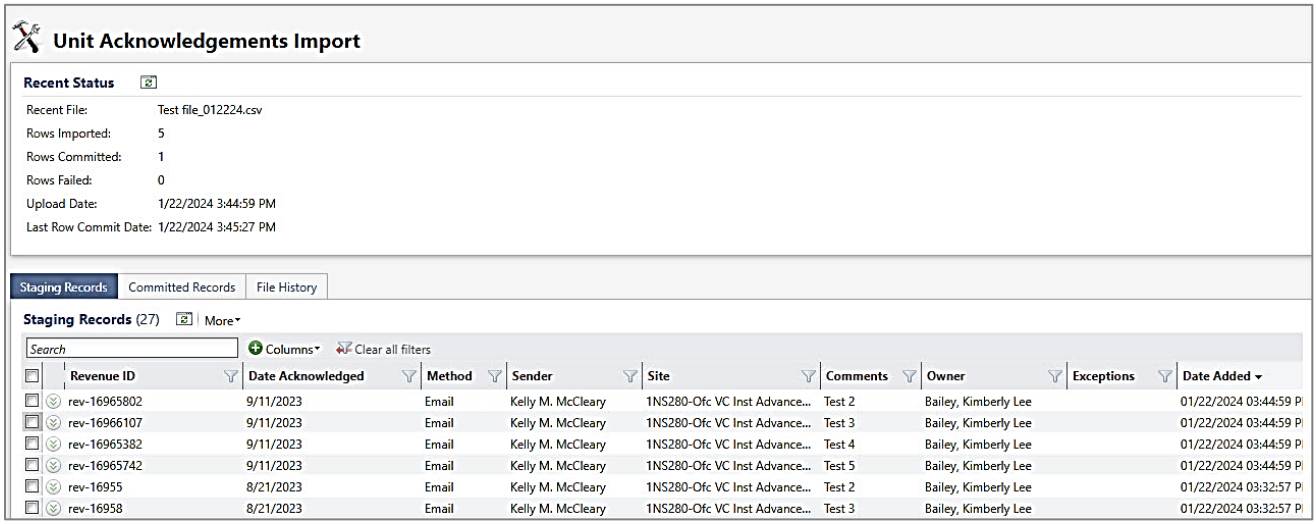
The Import File Name will show the .CSV file name that was chosen. Click **Save**.

Note: The system conducts a file validation check, ensuring the file contains the necessary variables in the headings. Use the provided template, and don't change the headings. Files lacking this information will be rejected. Additionally, users have the option to click cancel or clear the file if you have selected it incorrectly.

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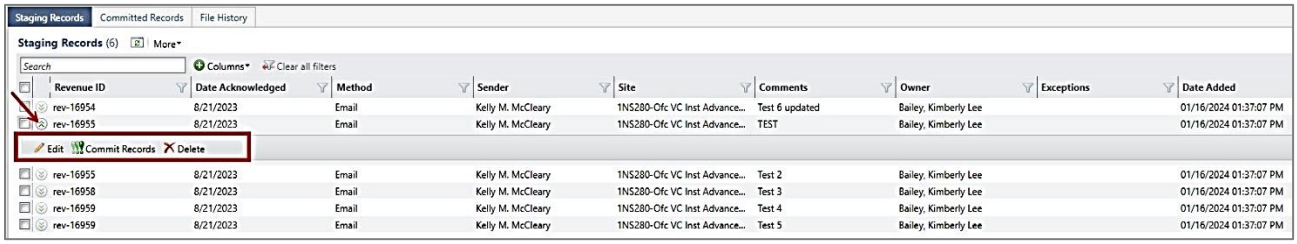
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Upon confirming the upload and clicking on **Save**, the imported data file moves into the Staging Records section.



Reviewing and Editing in Staging Records

From the Staging Records area, you can review the data and Edit, Delete, or Commit Records via the chevron buttons.

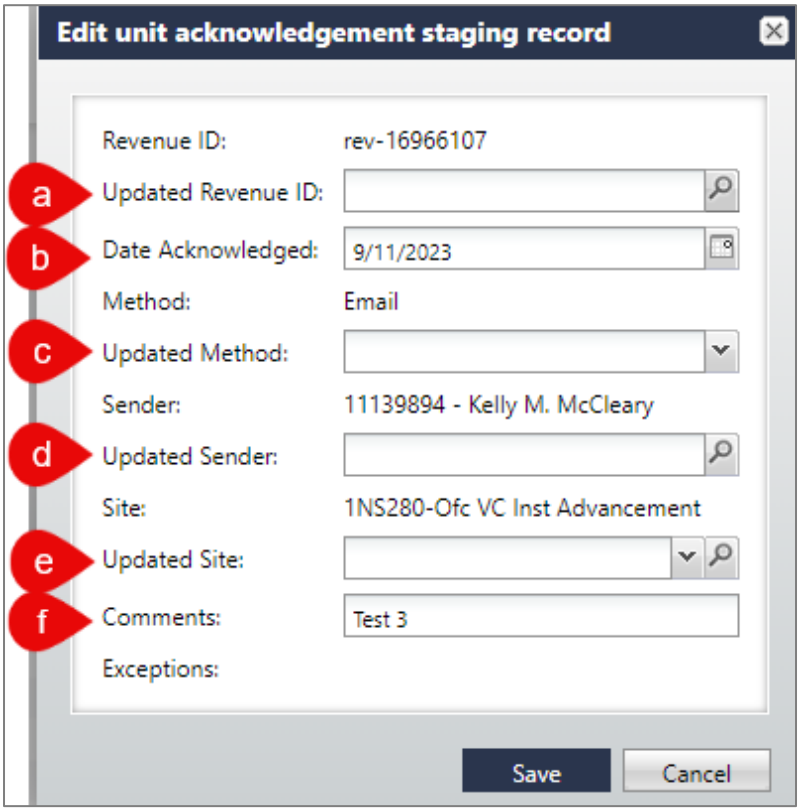


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Editing a record.

Click the Edit button, and you will be prompted to fill in the data below. Enter updated data where applicable.



a. **Updated Revenue ID** – Enter a Revenue ID to associate with the gift acknowledgement. You can search by entering the data or search using the magnifying glass.
b. **Date Acknowledged** – Enter a date when the gift acknowledgement was sent. You can enter the date or use the Date Picker. Format required: MM/DD/YYYY.
c. **Updated Method** – Enter an updated method from the drop down, of how the information was sent. The options are “Mail,” “Email,” “Phone Call”, “In Person”, or “CAP Card”.
d. **Updated Sender** – Enter the TED Lookup ID of the person responsible for recording the gift acknowledgement. You can enter the data or use the magnifying glass.
e. **Updated Site** - Enter the specific site from the drop down for your unit.
f. **Comments** - Enter short comments, a couple of sentences or less.

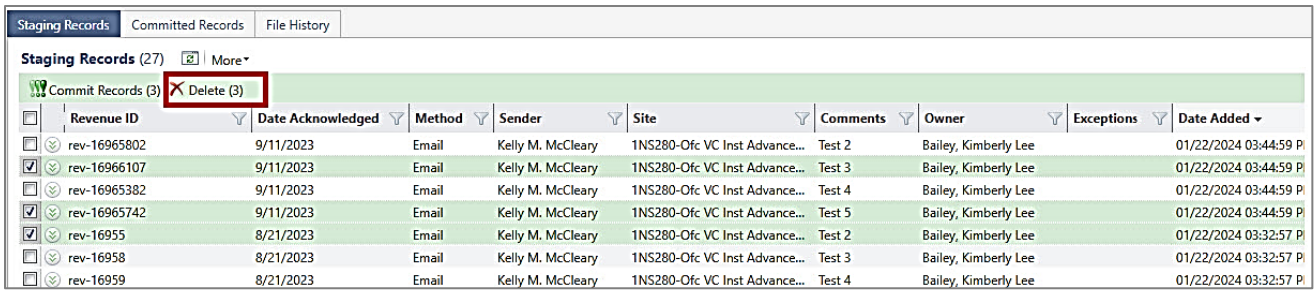
Click **Save** to apply the edits.

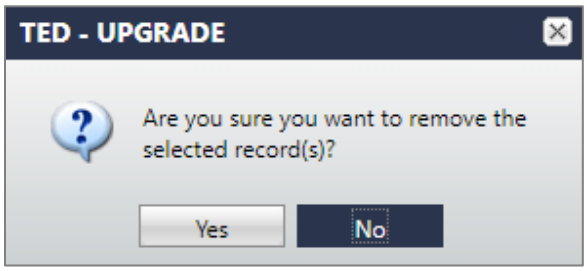
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Deleting a Record

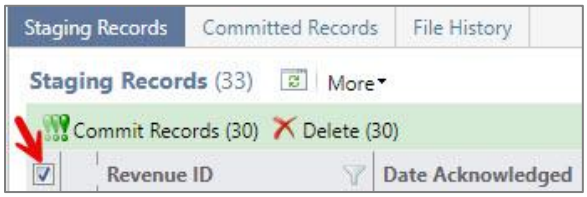
Choose one or more records to delete by selecting the checkbox next to each record or by clicking on the chevron next to the record, then select Delete. The selected records will be added, along with the corresponding number, to the Delete button at the top.





After choosing the Delete option, this confirmation message will appear. **Click Yes or No**.

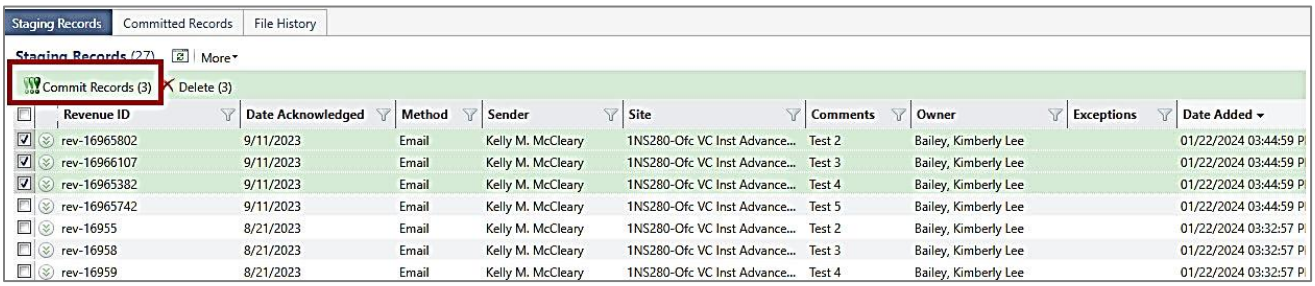
Note: If you wish to start over with a file after it is in the Staging Records area, you will need to select the checkbox at the top. It will show XDelete Records(#), with # indicating the number of records to delete. See screenshot below.

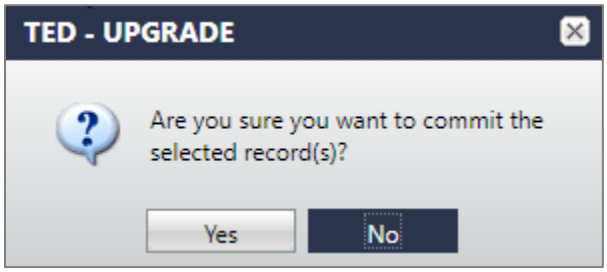


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Commiting Data

After reviewing and making necessary changes, proceed to commit the data. Choose one or more records to commit by selecting the checkbox next to each record or by clicking on the chevron next to the record. You can also click the checkbox at the top to select all records at one time to commit. The selected records will be added, along with the corresponding number, to the Commit Records option at the top. Click Commit Records.

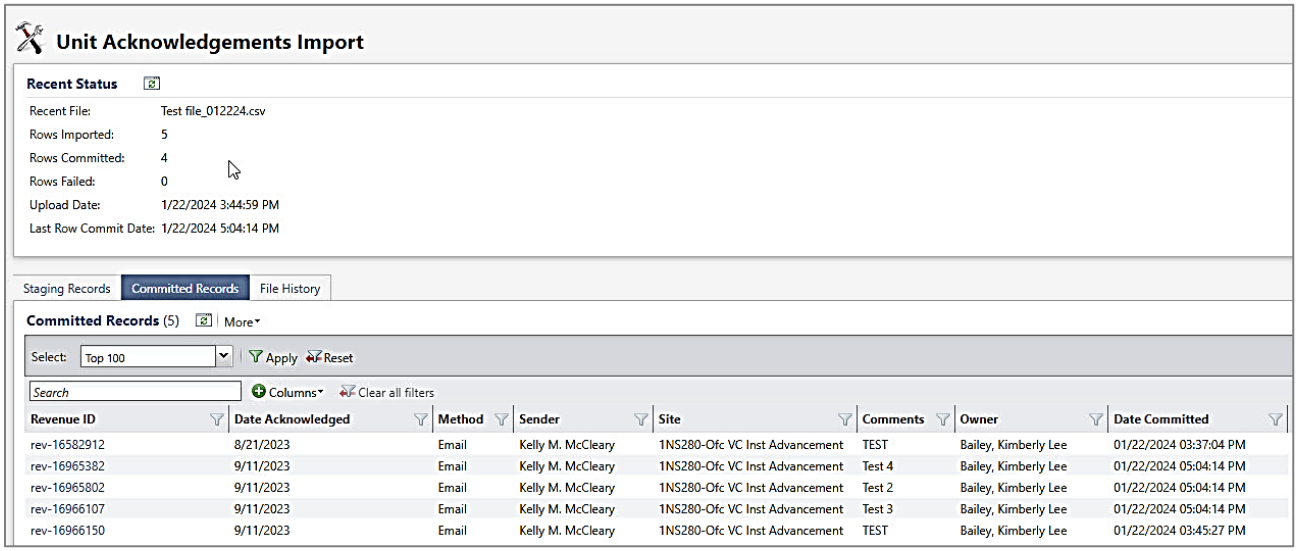




After choosing the Commit Records, a confirmation message will appear asking "Are you sure you want to commit the selected record(s)?" **Click Yes or No**.

Note: Please note that the data validation occurs only after the user clicks **Yes**.

The committed records that have no issues are moved from the Staging Records area and are displayed in the Committed Records area.



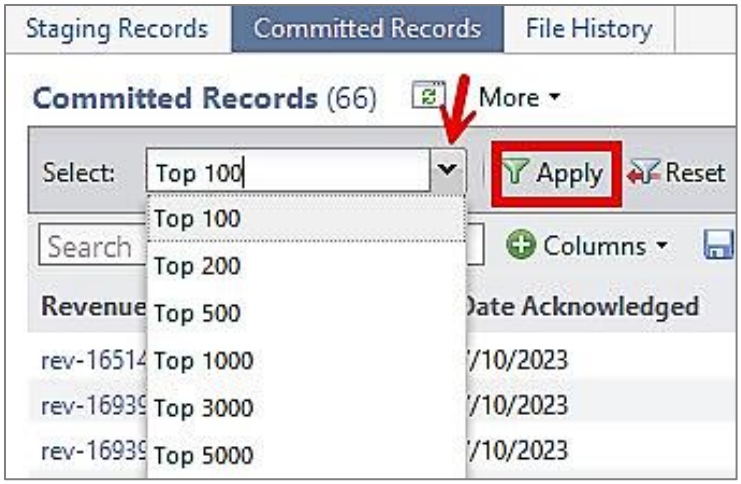
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Additional Display Options

Below the committed records, there is a drop-down list showing "Select Top 100." This allows you to choose to display the top 100 most recently imported records or access additional records from your history. You can adjust this to show more records if needed.

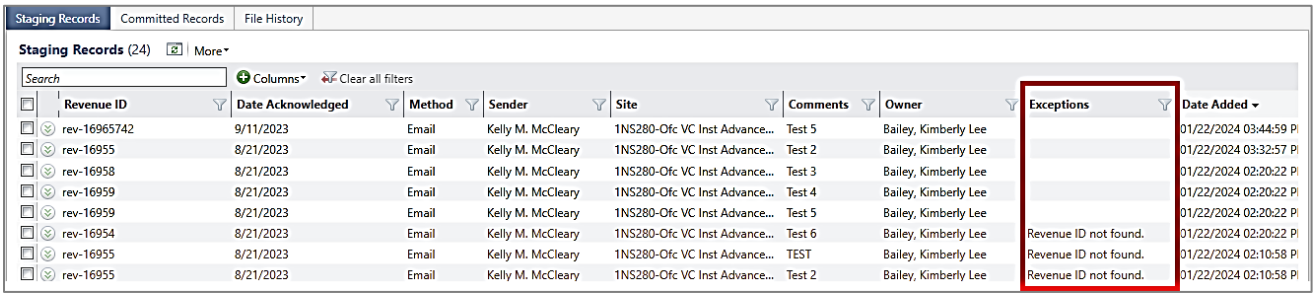
After selecting the top records, click Apply to implement the chosen display settings.

You can sort any of the fields in ascending or descending order for better organization.



Handling records with exceptions:

Records with exceptions will remain in the Staging Records area and will be highlighted in red with the exceptions displayed.

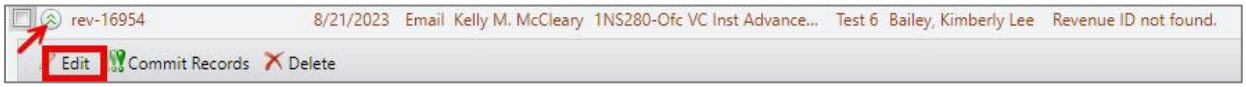


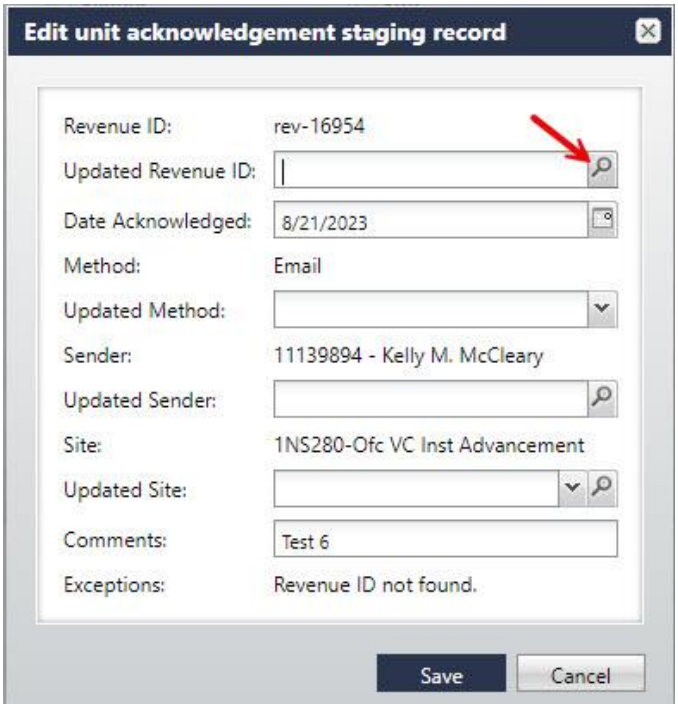
Revenue ID	Date Acknowledged	Method	Sender	Site	Comments	Owner	Exceptions	Date Added
rev-16965742	9/11/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 5	Bailey, Kimberly Lee		01/22/2024 03:44:59 P
rev-16955	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 2	Bailey, Kimberly Lee		01/22/2024 03:32:57 P
rev-16958	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 3	Bailey, Kimberly Lee		01/22/2024 02:20:22 P
rev-16959	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 4	Bailey, Kimberly Lee		01/22/2024 02:20:22 P
rev-16959	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 5	Bailey, Kimberly Lee		01/22/2024 02:20:22 P
rev-16954	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 6	Bailey, Kimberly Lee	Revenue ID not found.	01/22/2024 02:20:22 P
rev-16955	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	TEST	Bailey, Kimberly Lee	Revenue ID not found.	01/22/2024 02:10:58 P
rev-16955	8/21/2023	Email	Kelly M. McCleary	1NS280-Ofc VC Inst Advance...	Test 2	Bailey, Kimberly Lee	Revenue ID not found.	01/22/2024 02:10:58 P

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To address exceptions, users must click the chevron and then Edit to access the Edit menu, which displays the data labeled accordingly.





In the Edit menu, there is an "Updated" label with a textbox to edit where you can make the necessary edits.

This exception is Revenue ID not found. Clicking on the magnifying symbol will provide a list of Revenue IDs to choose from.

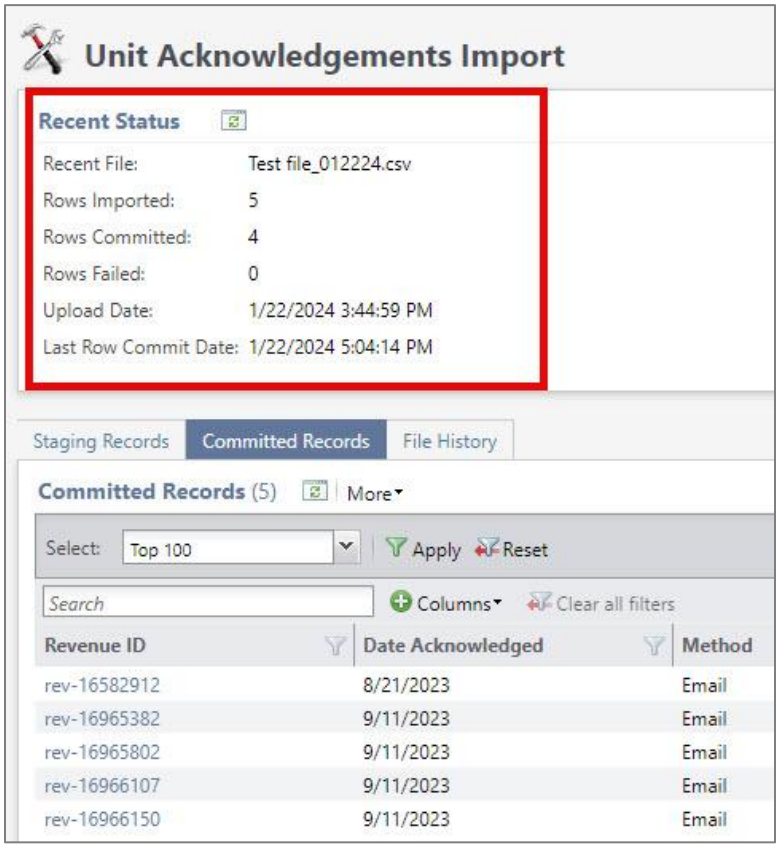
After completing the edits, click **Save** to apply the changes.

Unit Acknowledgements Import

The recent status of the uploaded file is displayed at the top for easy reference.

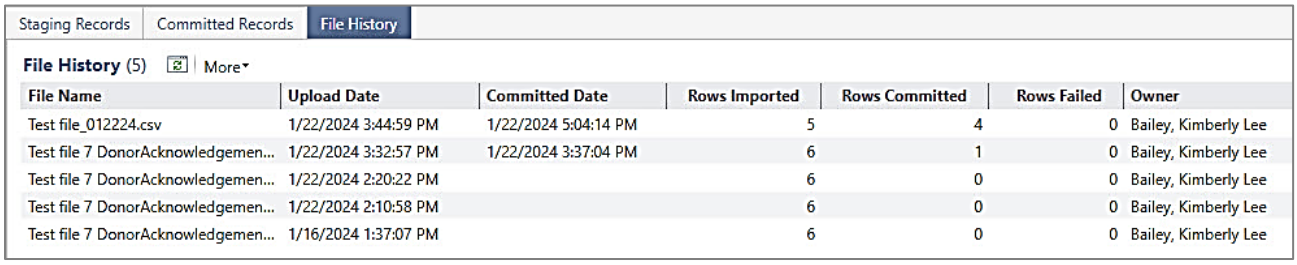
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Unit Acknowledgments Import - File History:

The File History tab provides a comprehensive File History, showing a record of all previously uploaded files.



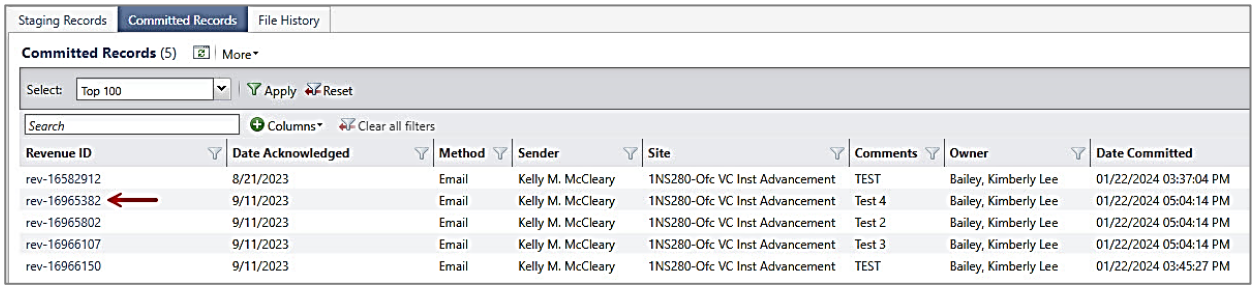
File Name	Upload Date	Committed Date	Rows Imported	Rows Committed	Rows Failed	Owner
Test file_012224.csv	1/22/2024 3:44:59 PM	1/22/2024 5:04:14 PM	5	4	0	Bailey, Kimberly Lee
Test file 7 DonorAcknowledgemen...	1/22/2024 3:32:57 PM	1/22/2024 3:37:04 PM	6	1	0	Bailey, Kimberly Lee
Test file 7 DonorAcknowledgemen...	1/22/2024 2:20:22 PM		6	0	0	Bailey, Kimberly Lee
Test file 7 DonorAcknowledgemen...	1/22/2024 2:10:58 PM		6	0	0	Bailey, Kimberly Lee
Test file 7 DonorAcknowledgemen...	1/16/2024 1:37:07 PM		6	0	0	Bailey, Kimberly Lee

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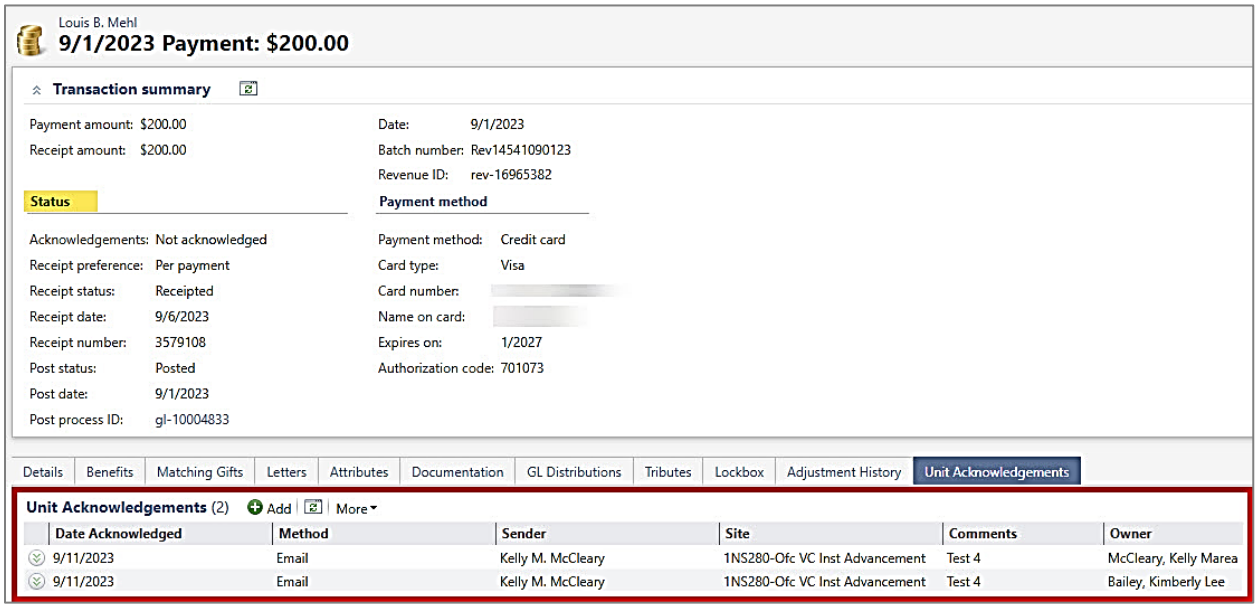
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Transaction Summary Page with Unit Acknowledgements Tab

You can verify if a donor has received a unit acknowledgement for a gift by navigating to the donor's Transaction Summary page. Two simple ways to get to the Transaction Summary page are to click on the Rev-Id link from the Committed Records tab as shown below or do a transaction search.
Clicking on the Rev-Id link from the Committed Records tab, directs you to the donor's transaction summary page, simultaneously opening the Unit Acknowledgments Tab.



After the Transaction Summary Page opens, click on the Unit Acknowledgement tab and you will see the display of all imported unit acknowledgements related to the selected transaction. Please note that the highlighted Status section is for letters sent by UIF for a specific type of gift and is NOT in reference to unit gift acknowledgements.

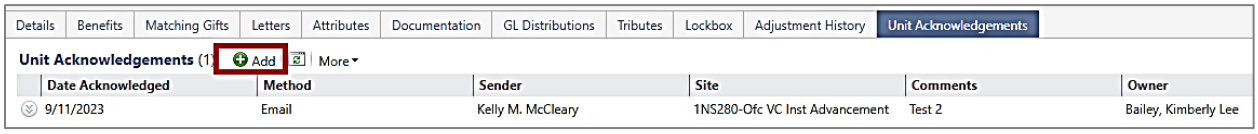


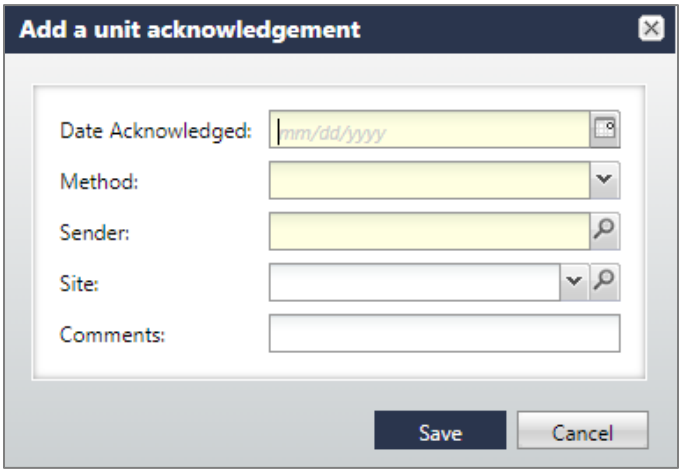
Add a Unit Acknowledgement

From the Unit Acknowledgement tab, click on the Add button.

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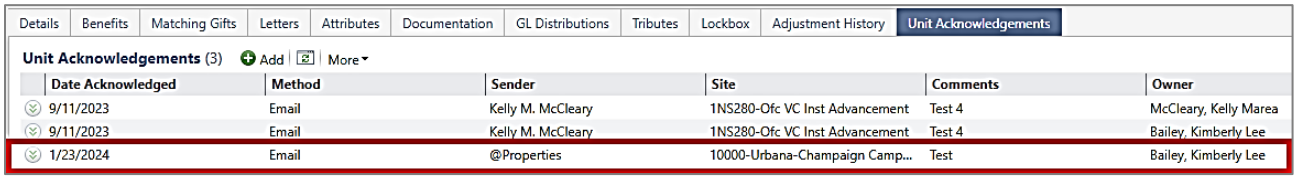
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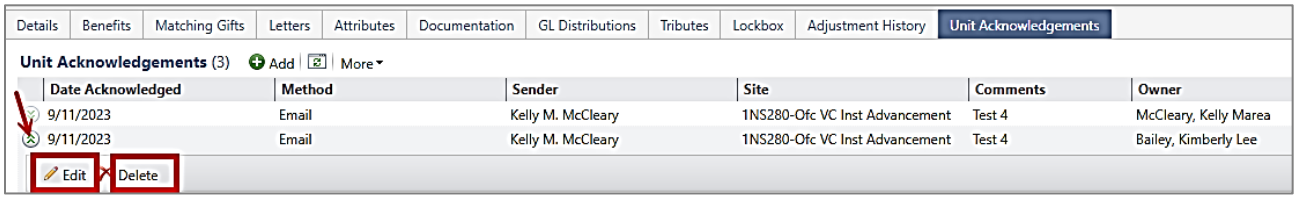
Enter the required data for the new Unit Acknowledgement.

Click **Save** to add the Unit Acknowledgement, which is now displayed in the list.



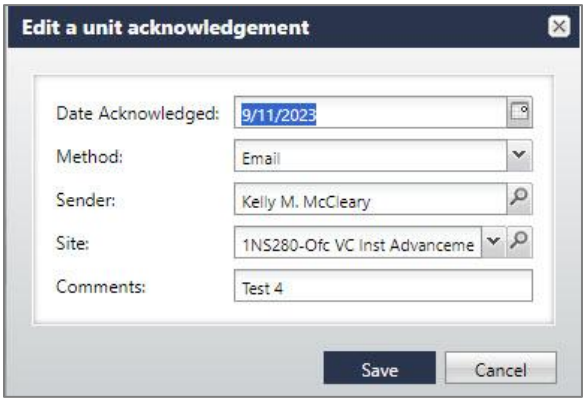
Edit or Delete a Unit Acknowledgement

From the Unit Acknowledgement tab, identify the data you want to Edit or Delete and click the chevron next to it.



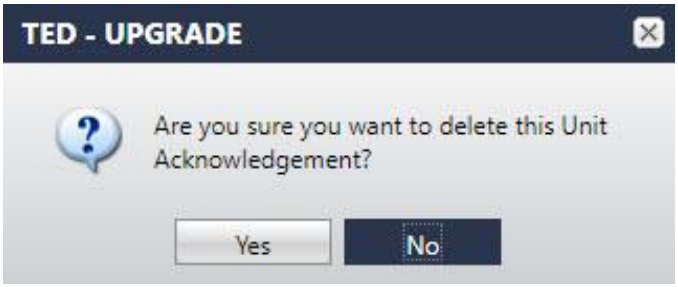
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Choosing Edit, allows you to modify the Unit Acknowledgement data.
Click **Save** after modifications are made.

Choosing Delete, you will be prompted with the following choice. If you choose **Yes**, the Unit Acknowledgement is removed from the list.



For any questions about this process please open a UIF Support Ticket-
https://support.uif.uillinois.edu

REVIEWED 4/9/25

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SECURITY TAB

Documentation to be Determined

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SUMMARY TAB

Documentation to be Determined

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UPDATES TAB

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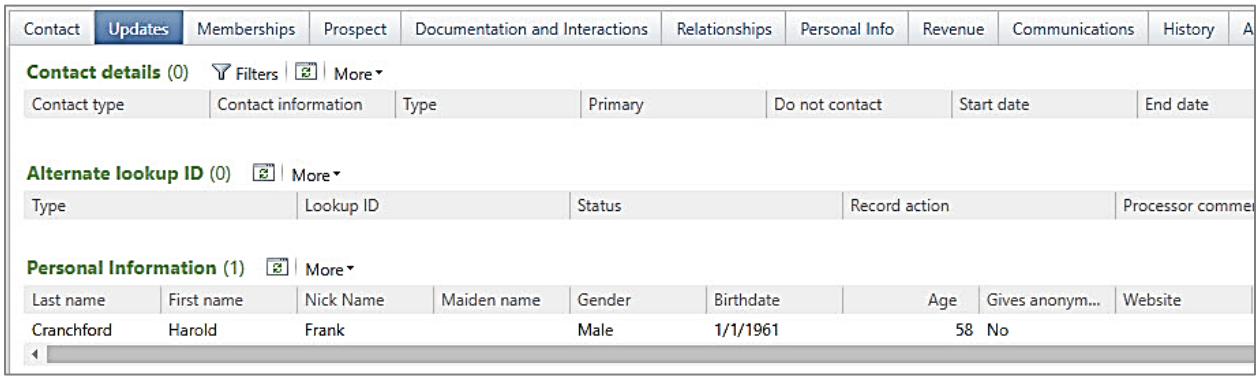
UPDATES AND HISTORY TABS

CHANGES TO CONSTITUENT RECORDS

The Updates tab and History tab located on a constituent record display certain pending and historical changes on that constituent.

Updates Tab

Bio Feedback submissions (add or edit) that have not been processed appear on the updates tab of the constituent record. After Data Management and Records process a Bio Feedback entry, they no longer appear on the Updates tab.



In addition, this notification displays on the record above the summary tiles.



History Tab

Many, but not all, data changes, display on this tab. Options are available to filter this report by:

- Field type
- User
- Date(s)
- Action (Add, Edit, Delete or All)

REVIEWED 7/30/24

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VOLUNTEER TAB

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VOLUNTEER TAB

OVERVIEW

The volunteer tab only becomes available after the constituent has been added to the volunteer area of TED. The Volunteer tab on the constituent record displays several sub-tabs that contain information about traits, availability, volunteer types, and notes for the selected volunteer. You can add, edit, and delete information from these tabs. After you have recorded all of the appropriate information for the selected volunteer, you can match and assign the volunteer to a job.

Sub-Tabs



1. **General** - The General sub-tab contains general information about the volunteer, such as a summary of volunteer activity, any associated volunteer types, and emergency contact details.
2. **Availability** - The Availability tab contains information about the days and times the volunteer is available. Availability is important when you match volunteers with jobs. From this tab, you can define recurrences the volunteer is available and specific instances the volunteer is unavailable.
3. **Schedule** - The volunteer schedule is a calendar which displays all job occurrences assigned to the selected volunteer. You can view the job occurrences in a calendar view or in a list view. To access the schedule, from the constituent volunteer, click **Schedule** under **Tasks**.
4. **Timesheets** - The Timesheets tab contains a list of timesheets for the selected volunteer. Timesheets contain information about the dates and times the volunteer completed assigned jobs. You can add, edit, or delete timesheets from this tab.

General Sub-tab

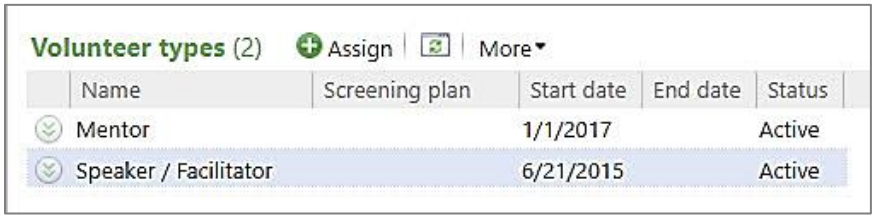
The General sub-tab is broken into three areas, Volunteer Summary, Volunteer Types, and Traits.



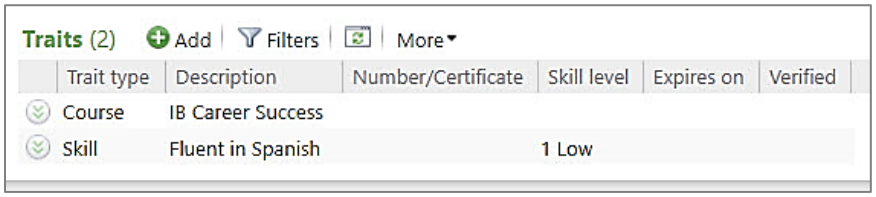
In the **Volunteer summary** area, you can view information about the volunteer's activity with your organization for the current year and over the lifetime. The program automatically calculates these values

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based on the timesheets entered for the volunteer and the estimated values of the jobs as entered when you add jobs.



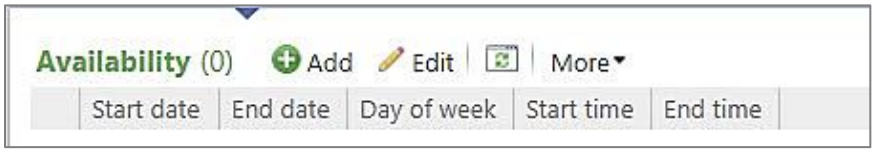
In the **Volunteer types** area, you can view the capacity in which the volunteer can serve your organization. You can assign multiple volunteer types and use them to match the volunteer to a job.



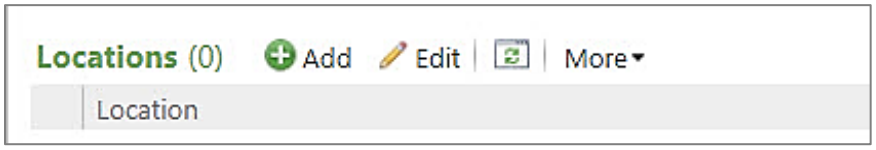
In the **Traits** area, you see information about the different traits assigned to the volunteer or the traits associated with a specific job. Traits include skills, interests, special needs, and certifications. Here, you can add, edit, and delete trait information. You can add multiple traits for a single volunteer or job.

Availability Sub-tab

The Availability sub-tab is divided into three areas Availability, Locations, and Additional Information



In the **Availability** area, you can maintain the times and dates a volunteer is available to work for your organization. Use this for volunteers who serve your organization on a recurring basis. You can enter start and end dates and times, along with the days of the week the volunteer is normally available to work.



In the **Locations** area, you can maintain the geographical area's at which a volunteer is willing to participate. Typical uses include out of state volunteers who are willing to host admission events in their state, volunteers who live in one location but are willing to travel to other locations, or volunteers who must limit where he or she can participate.

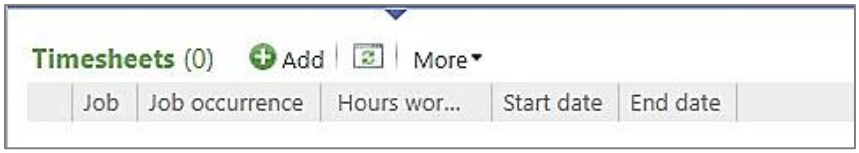
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In the **Additional Information** area, you can add additional information regarding the volunteer's time or location availability. You can also identify specific dates where a volunteer may be unavailable. There are no current best practices for this area.

Timesheets Sub-Tab



In the Timesheets sub-tab, you can record the amount of time the volunteer works for a specific job or job occurrence. You can use this information to manage the total number of hours a specific volunteer works for your organization, and at what jobs.

Schedule Sub-Tab



In the Schedule sub-tab, you can view the constituents past volunteer participation.

REVIEWED 12/6/24

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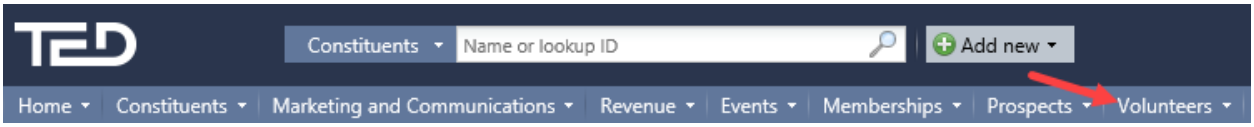
ADD AND FIND VOLUNTEERS

UNDERSTANDING HOW TO FIND VOLUNTEERS IN TED

A volunteer must first be added to the Volunteer area before he or she can receive volunteer affiliation points or be linked to a volunteer job. Once the volunteer constituency has been added the constituent can be found using the volunteer search.

Add a Constituent to the Volunteers Area

A constituent must be added to the Volunteer area in TED before he or she can be assigned volunteer duties. Begin by selecting the Volunteers menu from the blue bar at the top of the screen.





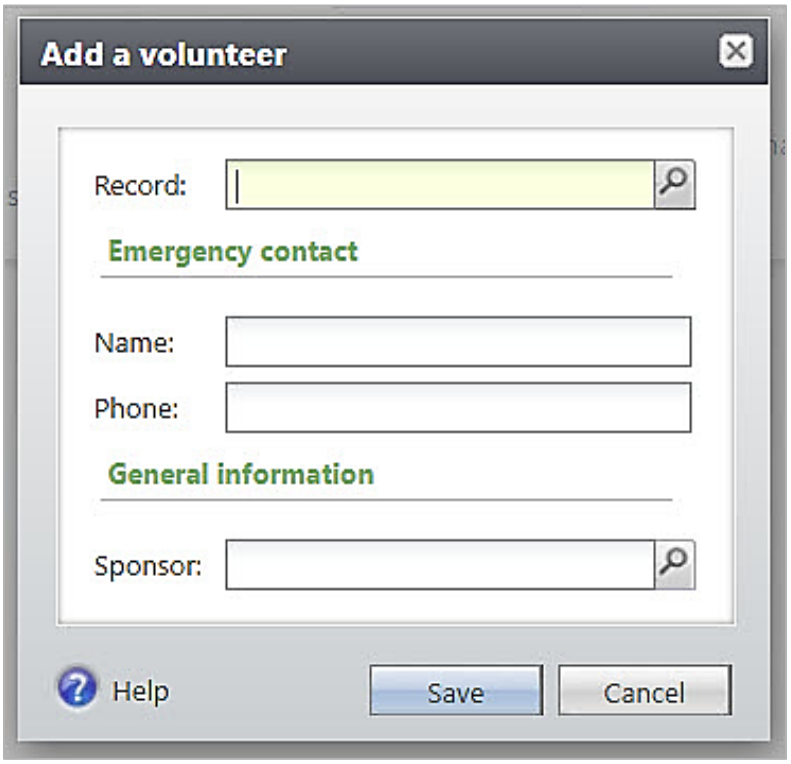
Use the **Add a volunteer** option in the Volunteers menu to open the Add a volunteer window and add the constituent as a volunteer.

Add a Volunteer Screen

Once the constituent has been selected complete the Add a Volunteer screen.

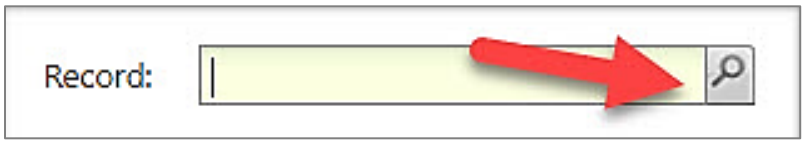
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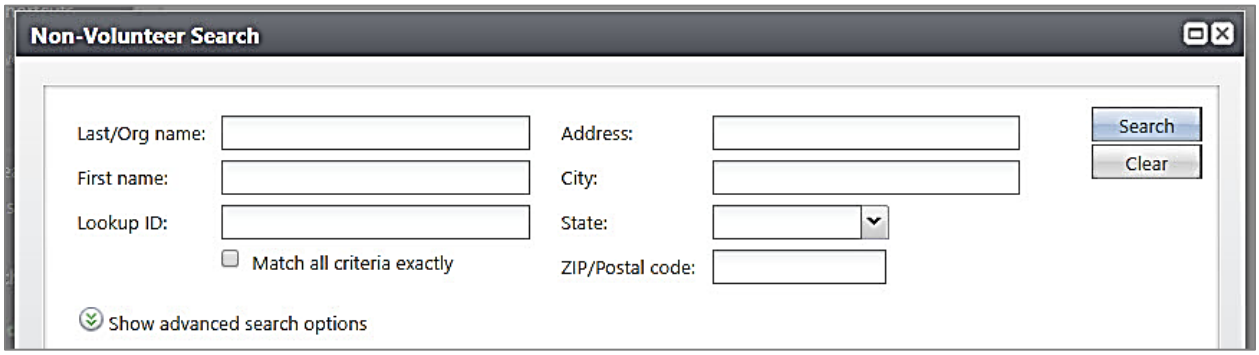
1. **Record** – The name of the individual constituent that will be volunteering.
2. Emergency Contact - **Name and Phone fields** – Emergency contacts are not currently in use.
3. General Information – **Sponsor** – If the volunteer is sponsored by an organization with a record in TED, link the organization and the volunteer.

Select the magnifying glass in the Record area of this window to open the Non-Volunteer Search.



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This screen returns only those constituents not already categorized asvolunteers.



In the Non-Volunteer Search screen add the first and last name of the constituent that will be added to the Volunteers area. The constituent must be in TED before he or she can be added as a volunteer.

If the constituent you select is actually a household, you will be prompted to select the member of the household to add as a volunteer, as households cannot be volunteers.

Volunteer Constituency

Once the constituent has been added to the volunteer area, the Volunteer constituency will be added to his or her record automatically.



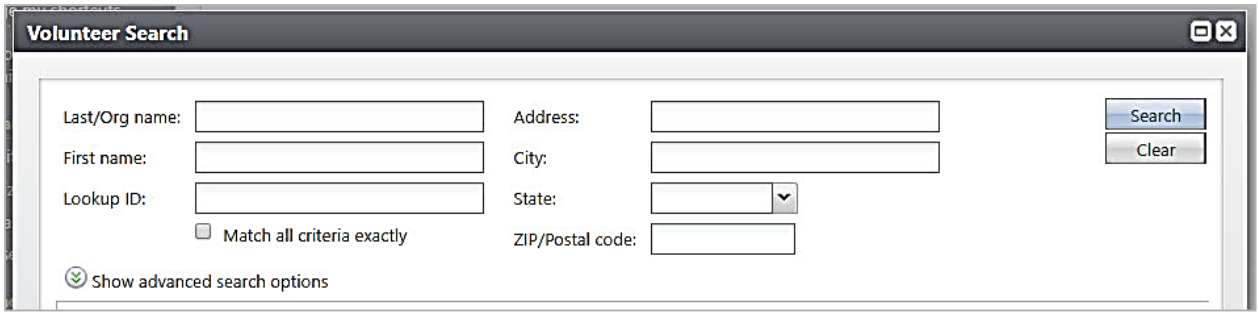
Search for Volunteers

Once a constituent has been added to the Volunteer area of TED, you can find that specific volunteer using the Volunteer Search screen.



On the search screen, enter the criteria on which to base your volunteer search. For example, entering an "S" in the **Last/Org name** field will limit search results to volunteers whose last names begin with "S".

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Selecting the volunteer from this window will open the individual constituent record on the Volunteer tab.

REVIEWED 1/30/25

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JOBS AND JOB OCCURRENCES

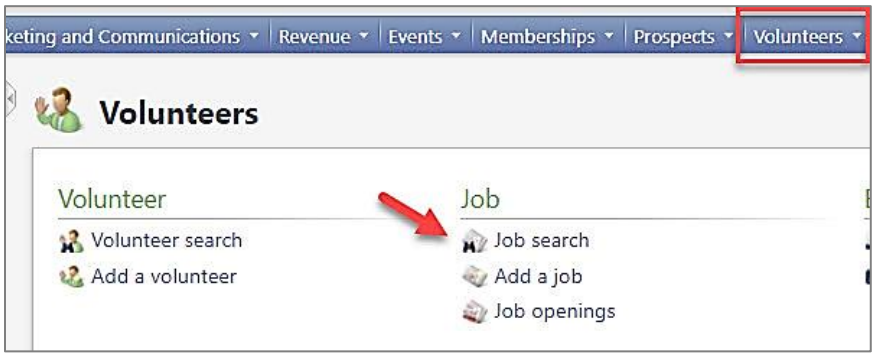
CREATING A SPECIFIC TASK FOR THE VOLUNTEER IN TED

A job is a task assigned to a volunteer. This can be a single one-off task or a recurring responsibility depending on unit needs. A job occurrence is an instance or instances of the specific task that can be assigned to the volunteer.

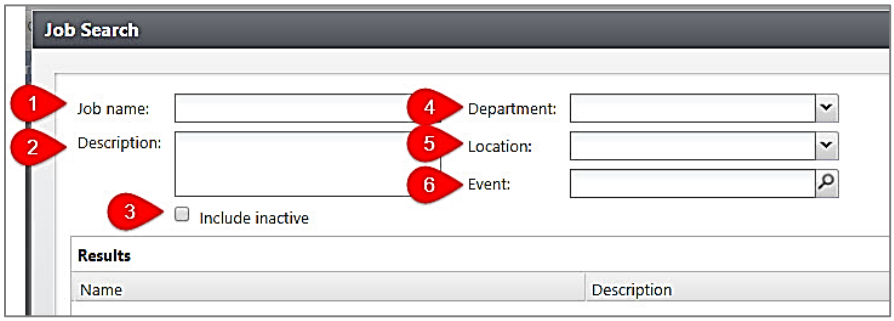
Search forJobs

Once a job has been created it can be searched for and job occurrences added as needed.

Begin by selecting the **Job Search** option on the Volunteer menu.



Enter the criteria on which to base your job search.



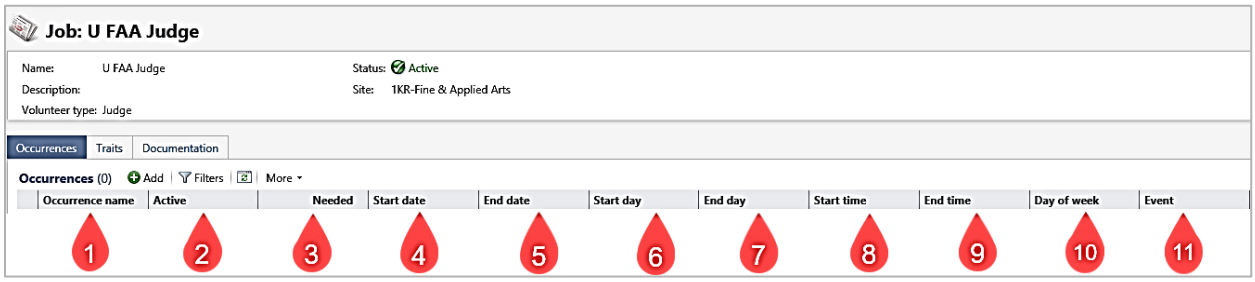
1. **Job name** – Enter the name of the job for which you are searching or enter the site and prefix to narrow the Job name. (EX. U LAS).
2. **Description** – If the job was created with a description, use keywords to find the job.
3. **Include inactive** – Including inactive will include any job that has a status marked inactive.
4. **Department** – Select the appropriate department from the dropdown.
5. **Location** – Select the appropriate location from the dropdown.
6. **Event** – Search for the event to display all jobs associated with that event.

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Job Page

The job page displays information about occurrences, traits, and documentation for the selected job.



1. **Occurrence name** – The unique occurrence name is displayed.
2. **Active** – This indicates if the occurrence is active or inactive.
3. **Needed** – The number of volunteers needed for that specific job occurrence.
4. **Start date** – The day the occurrence will begin.
5. **End date** – The day the occurrence will end.
6. **Start day** – The specific day of the week the occurrence begins.
7. **End day** – The specific day of the week the occurrence ends.
8. **Start time** – The time the occurrence will begin.
9. **End time** – The time the occurrence ends.
10. **Day of week** – The specific day of the week for the occurrence.
11. **Event** – Indicates if the job is associated with a specific event.
    Note: To add, edit or delete a job contact the AIMS team - aims@uif.uillinois.edu

Job Occurrences

An occurrence is an actual task that is being performed.

From the Occurrences tab of a job page, you can add multiple occurrences for a job and enter details about each occurrence. You can also use occurrences to manage jobs that occur at multiple locations.

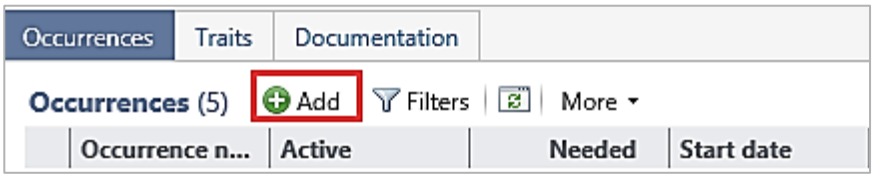
From the Job Occurrences tab of an event record, you can also add multiple job occurrences for an event and enter details about each occurrence. When you add a job occurrence from an event record, you must select the job to which the occurrence applies.

Add a Job Occurrence

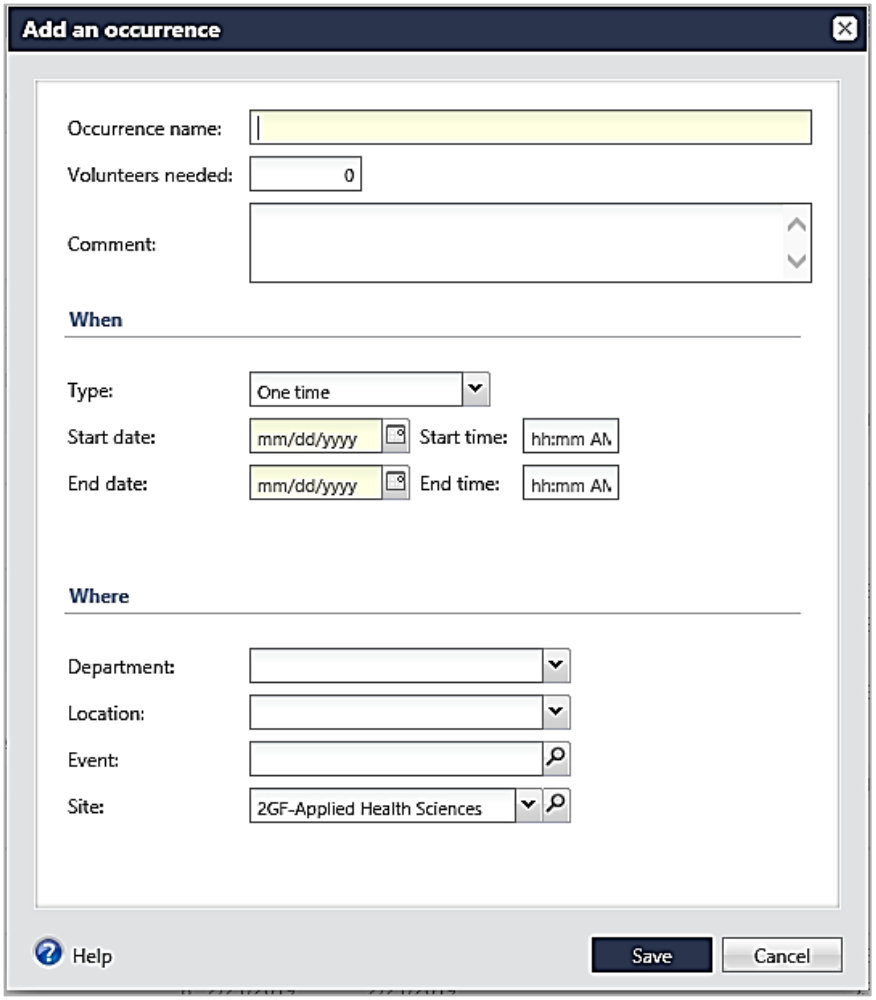
The Occurrences tab contains information about the individual occurrences of a job. Job occurrences are the specific times and places a certain job needs to be completed. Some jobs may occur only one time, while others may happen regularly over an extended period of time.

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On the Occurrences tab of the job record select **Add** to open the Add an Occurrence window.

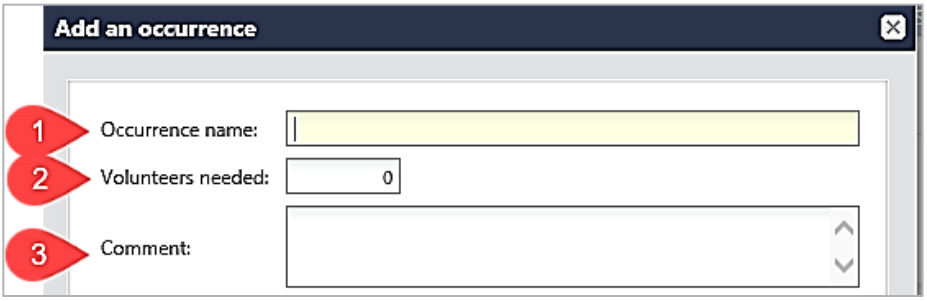


Complete the Add an Occurrence window with all appropriate information.



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Occurrence identification information.



1. **Occurrence name** – A unique name to identify the specific occurrence.
2. **Volunteers needed** – The number of volunteers needed to fulfill that specific responsibility.
3. **Comment** – Any additional comments used to describe the occurrence.

Add the job occurrence date and time

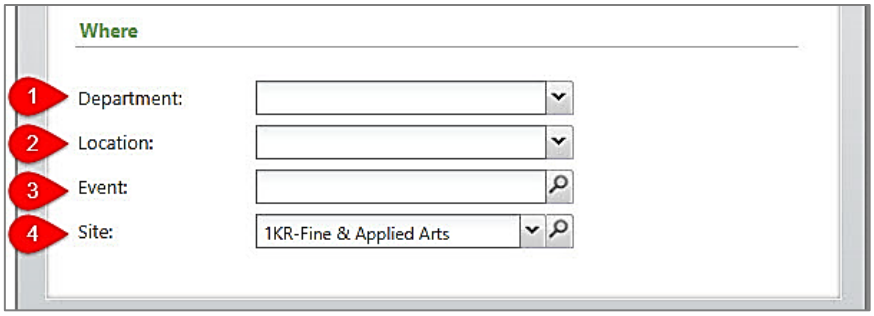


1. **Type** – Select One time, Recurring, or On going, depending on the need.
    - **One Time** – There will be no other instances of this specific job occurrence and A single start and end date is added.
    - **Recurring** – There are multiple instances of this job occurrence over a short period of time with a known end date. Add the start and end dates and include the day of the week that the occurrence will happen.
    - **On going** – As there are multiple instances of this job occurrence, there is no start or end date option. Include the day of the week the occurrence happens most often and add start and end times if applicable.
2. **Start date** – Date the specific occurrence begins.
3. **End date** – Date the specific occurrence ends.
4. **Start time** – Time the specific occurrence begins.
5. **End time** - Time the specific occurrence ends.

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Add the location of the job occurrence.

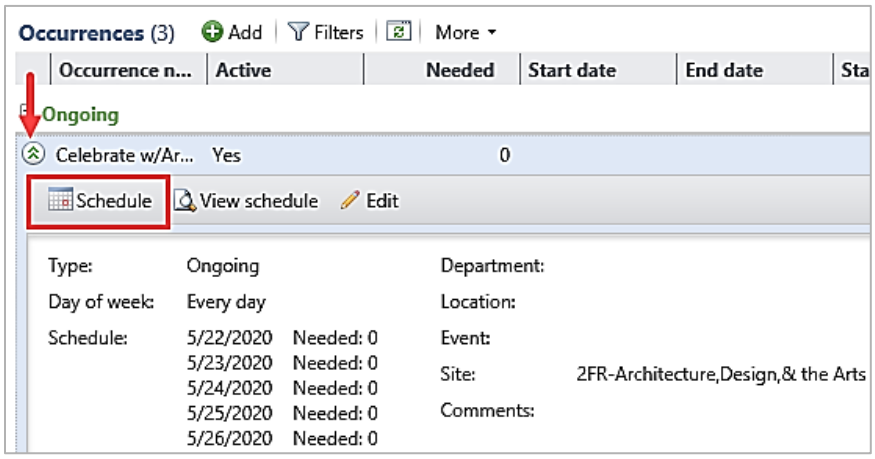


1. **Department** – Select a department from the drop-down menu. Leave this area blank or request the AIMS team add your department to the drop-down.
2. **Location** – Select from the following locations- On Campus (Urbana), On Campus (Chicago), and On Campus (Springfield).
3. **Event** – If the job occurrence is associated with an event use the magnifying glass to search for the event. This option is not available when the occurrence is on going.
4. **Site** - Use either the drop-down or the magnifying glass to find the site associated with the occurrence.
   Note: To edit or delete a job occurrence, please contact AIMS – aims@uif.uillinois.edu

Job Occurrence Schedule

The job occurrence schedule is a calendar which displays all volunteers assigned to a selected job occurrence. You can view the calendar by day, week, or month.

Select the double arrows to the left of the job occurrence name to expand the section and select the Schedule option.



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MANAGING THE VOLUNTEER

MANAGING THE VOLUNTEER'S ABILITIES, INTERESTS, AND AVAILABILITY VIA THE VOLUNTEER TAB

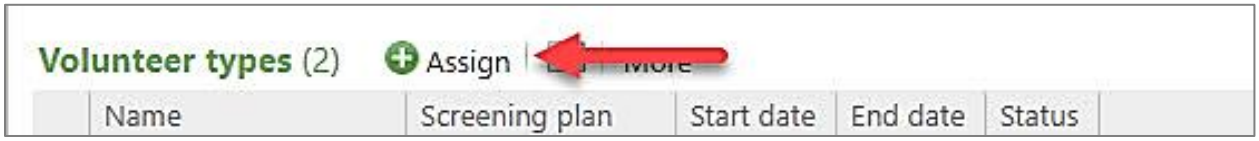
Volunteers must be matched to jobs in the TED system. By ensuring the constituent's abilities, interests, and volunteer availability are up to date it becomes easier to match the volunteer to the job.

Volunteer Types

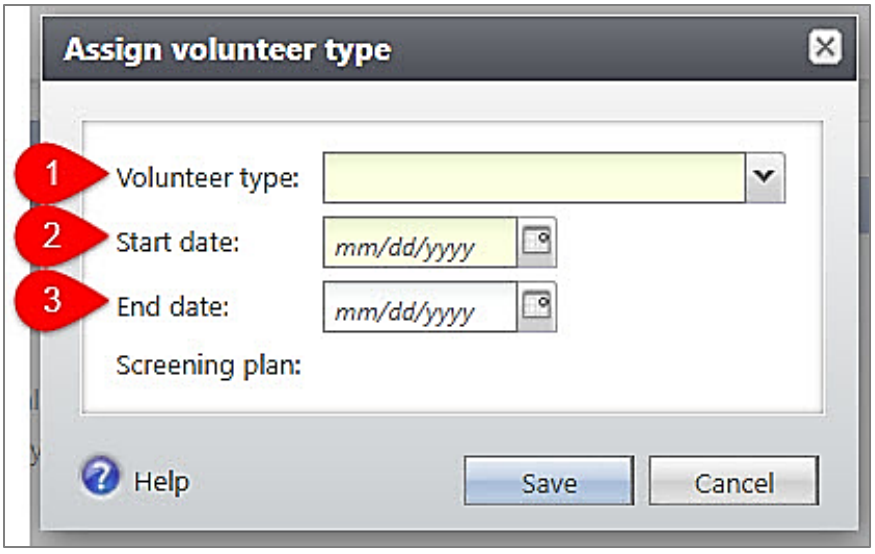
Volunteer types reflect how the constituent prefers to participate when volunteering. Volunteer types allow you to match the right volunteer to the right job or responsibility. You can assign multiple volunteer types to a single volunteer allowing the constituent a wider range of volunteer opportunities with the unit or the University.

Assign the Volunteer Type

Volunteer types are assigned via the General sub-tab of the Volunteer tab of the constituent's individual record.



In the Volunteer types section select **Assign** to open the Assign volunteer type window.



1. Select the appropriate **Volunteer type** from the drop-down provided.

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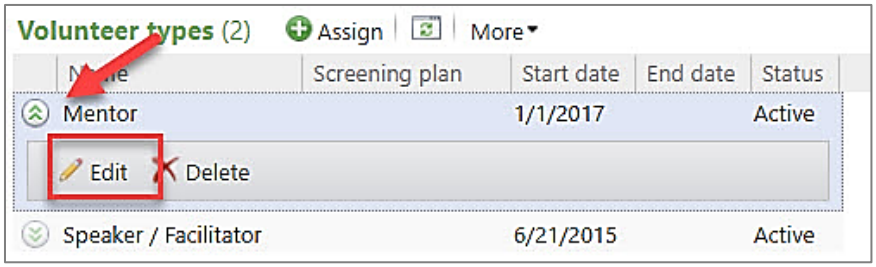
2. Add the **Start date** the constituent agreed to this volunteer type or the date you were made aware of the agreement.
3. Add the **End date** the constituent would like to complete using this specific volunteer type. If unknown or the constituent has not indicated a date, leave blank.

Select **Save.**

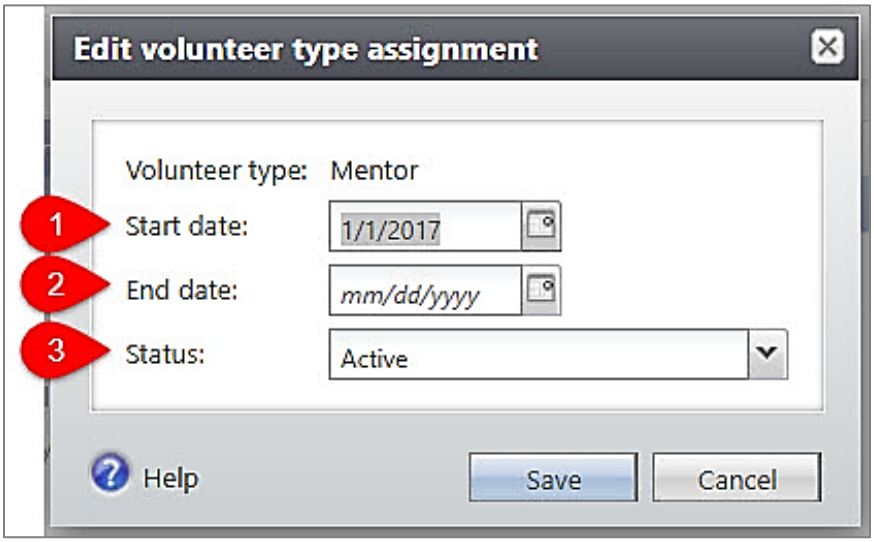
Edit a Volunteer Type Assignment

To retain a history of the assignment when you no longer require it, you can edit the status of the assignment to "Inactive."

Select the double arrows to the left of the volunteer type to expand the type section and select **Edit**.



This will open the Edit volunteer type assignment window.



1. Update the **Start date** if necessary.
2. The **End date** indicates when the constituent will no longer participate in this volunteer capacity.
3. To preserve historical information, change the **Status** to Inactive. If the constituent chooses to volunteer in this way again in the future it can be edited back to Active.

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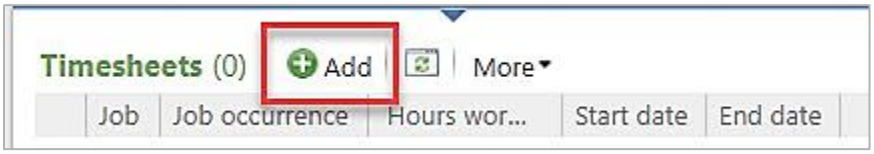
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TIMESHEETS

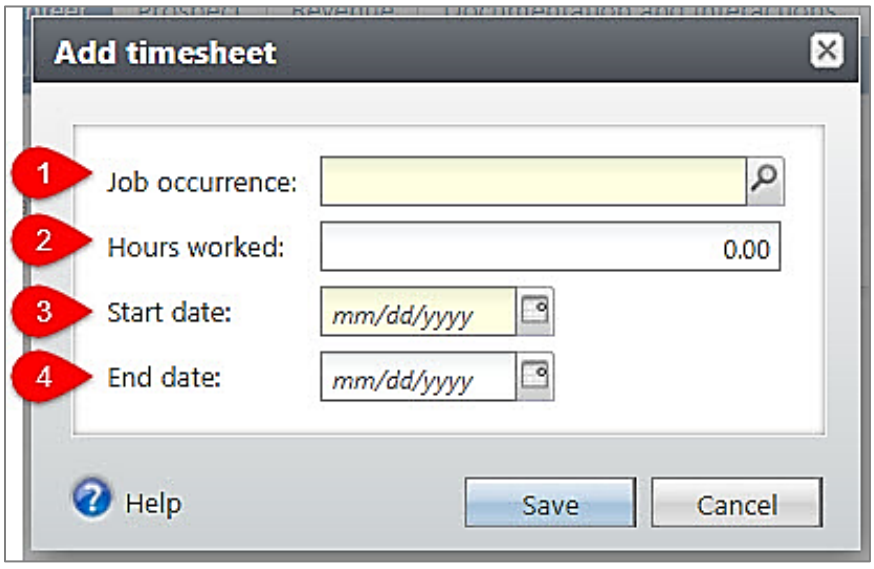
On the Timesheets tab of the Volunteer tab, you can record the time the volunteer works for a specific job or job occurrence. Use this area to manage the total number of hours a specific volunteer works and at what jobs.

Add Timesheets

Click the Add button on the Timesheets sub-tab in the Volunteer tab of the constituent's individual record.



Select **Add** to open the Add timesheet window.



1. Search for and select the **Job occurrence** associated with the volunteer's activities.
2. Add the number of hours the constituent worked or is expected to work.
3. Add the start date when the constituent began his or her volunteer participation.
4. Add the end date when the constituent ended his or her volunteer participation.

Select **Save**.

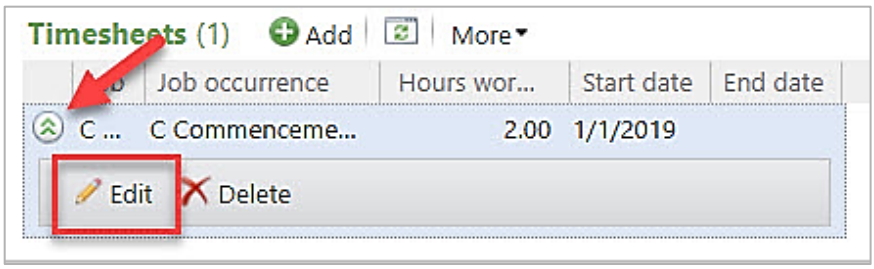
Edit Timesheets

If a volunteer worked two more hours than he was scheduled to work, update his or her timesheet to reflect the additional hours.

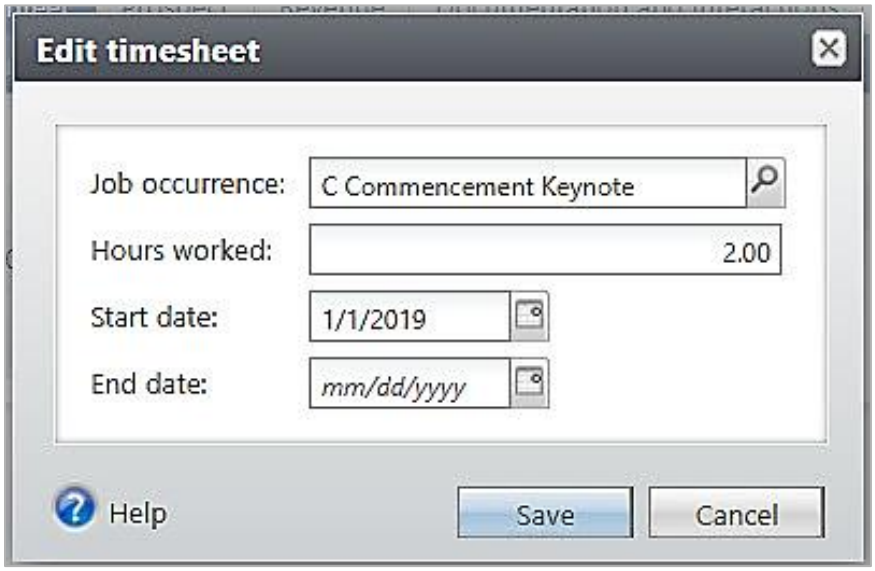
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Select the double arrows to the left of the job name to expand the section and select **Edit.**



Edit the information as appropriate and click **Save**.



REVIEWED – 2/13/24

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MATCHING VOLUNTEERS TO JOBS

ASSOCIATING THE VOLUNTEER TO THE WORK THAT NEEDS TO BE DONE

Once a constituent has been added to the volunteer area of TED he or she can be matched to a job or job occurrence. The job is the specific task or responsibility assigned to the volunteer. Jobs and job occurrences must be set up in TED prior to matching the constituent.

Match Process

The program uses several guidelines to match volunteers and jobs.

Volunteer type - If a volunteer type is assigned to the job, the volunteer must have the same volunteer type,and it must be active. If there is no volunteer type assigned to the job, all volunteers meet the volunteer type requirement to match.

Availability - To match, a volunteer must be available on the date and time of the job occurrence. All availability on the volunteer's record is checked. If no availability is defined for the volunteer, the program assumes the volunteer is always available. If the volunteer is already scheduled to work during the selected time, he or she will not display as a match for the selected job.

Location - The volunteer must be available at the location assigned to the job. If no location is assigned to a job, the program assumes any volunteer can complete the job. If no location is assigned to a volunteer, the program assumes the volunteer is available to work at any location.

Special needs traits - If one of the volunteer's traits is a special need, that volunteer is matched only with jobs that accommodate that special need. If no special needs traits are defined for a job, the program assumes that the job cannot accommodate volunteers with special needs.

Traits - After volunteers are matched with jobs according to volunteer type, availability, location, and special needs traits, the remaining traits are used to create a percentage match. For traits to be considered in the matching process, they must be verified on the volunteer's record. If a trait is expired on the volunteer'srecord, the volunteer is excluded during the match process. If a trait is required for the job, only volunteers with the trait are matched.

When the match process is complete, a list of all eligible volunteers or jobs appears. Match results are based on a percentage. The match percentage is the number of matched traits divided by the number of traits on the job, rounded up to the nearest whole number.

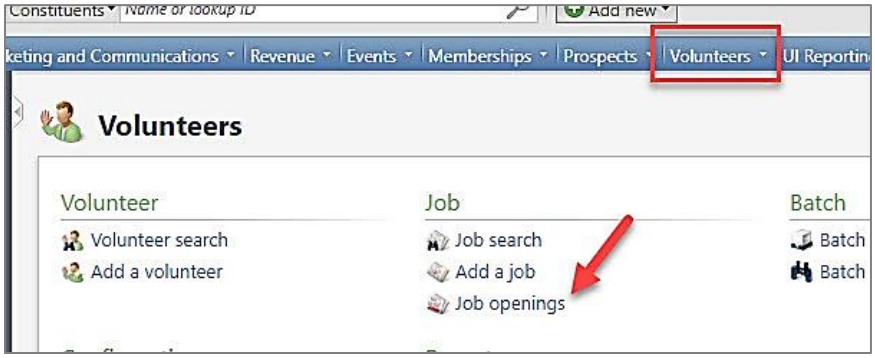
Job Openings Page

The Job Openings page contains a list of all current jobs which still need volunteers.

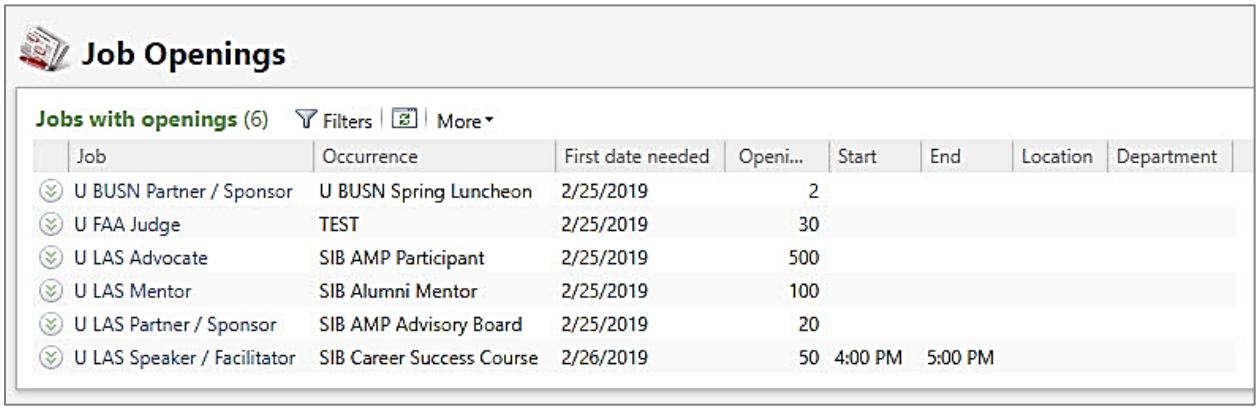
Select the Job openings option on the Volunteers menu.

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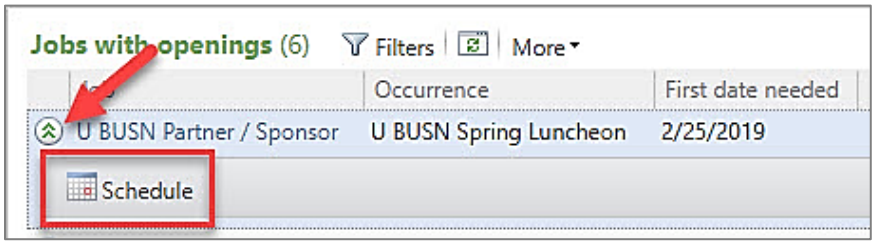


This will open the Job Openings page.



The Job Openings page contains the names of jobs and occurrences, the first date a volunteer is needed for each occurrence, start and end times for the occurrences, and the number of openings. From this page, you can view specific jobs or view a calendar on which to assign volunteers to the open jobs.

To open the schedule associated with a specific job opening, select the double arrows to the left of the job occurrence name to expand the section.



Select the **Schedule** option.

Match and Assign Job Occurrences to Volunteers

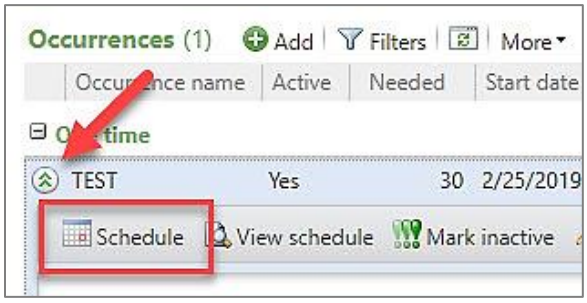
To match a volunteer to a job occurrence, begin on the schedule. There are two ways to do this.

Begin on the Job

Select the schedule option from the job occurrence.

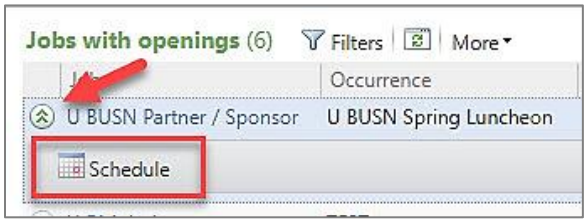
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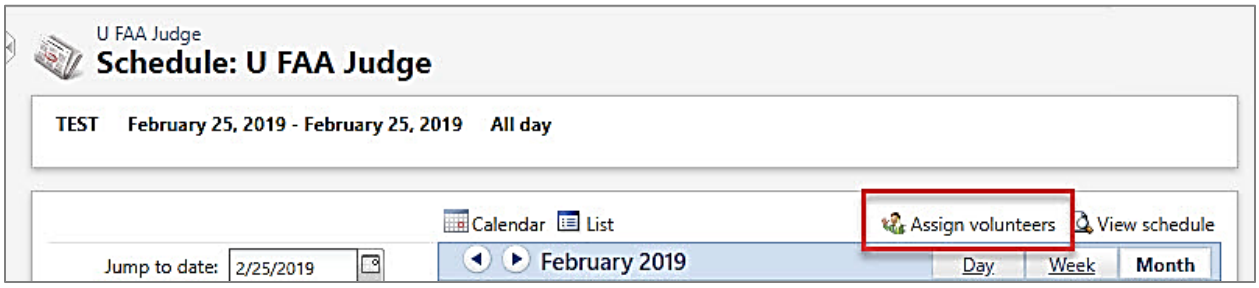
Begin on the Job Opening Screen

Select the schedule option from the job opening.



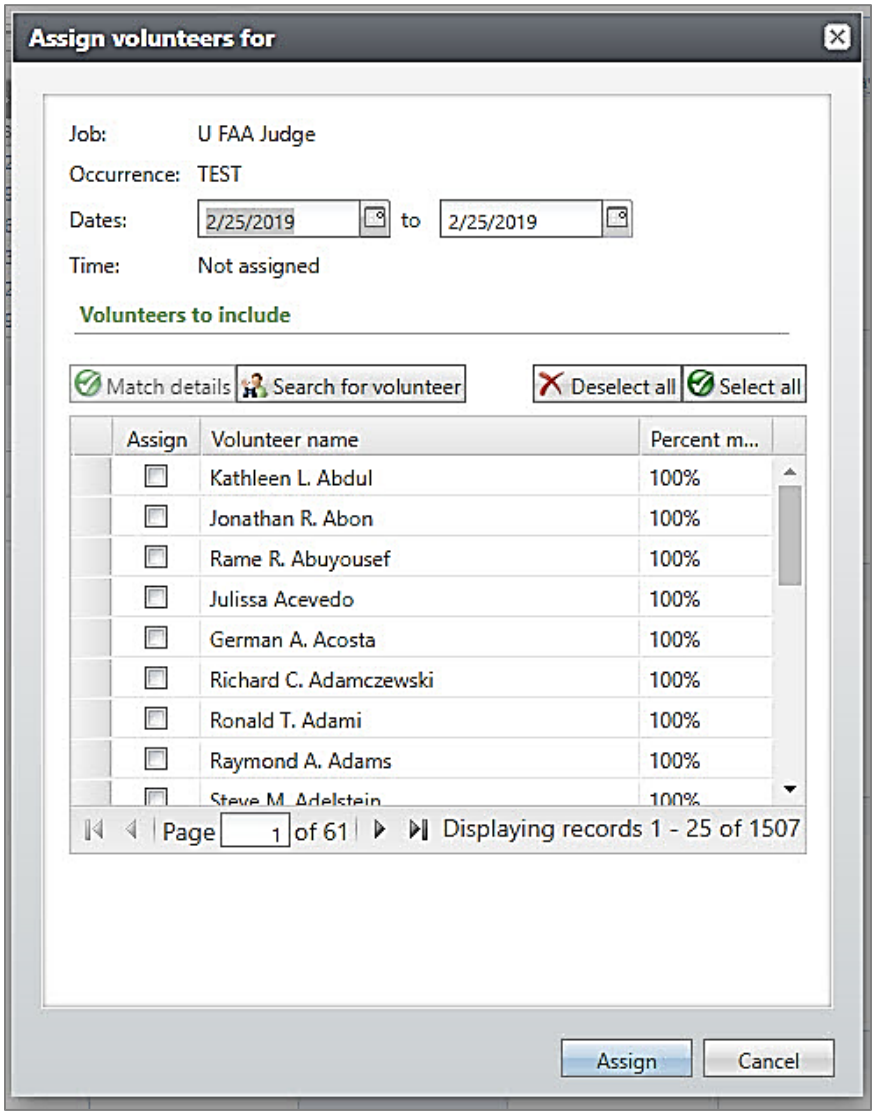
Assign the Volunteer

Once on the volunteer schedule select Assign volunteers.



This will open the **Assign volunteers for** window.

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When assigning volunteers the program compares the traits of a volunteer with the traits a job requires. The program also checks volunteer availability, including location availability. This gives a percentage match.

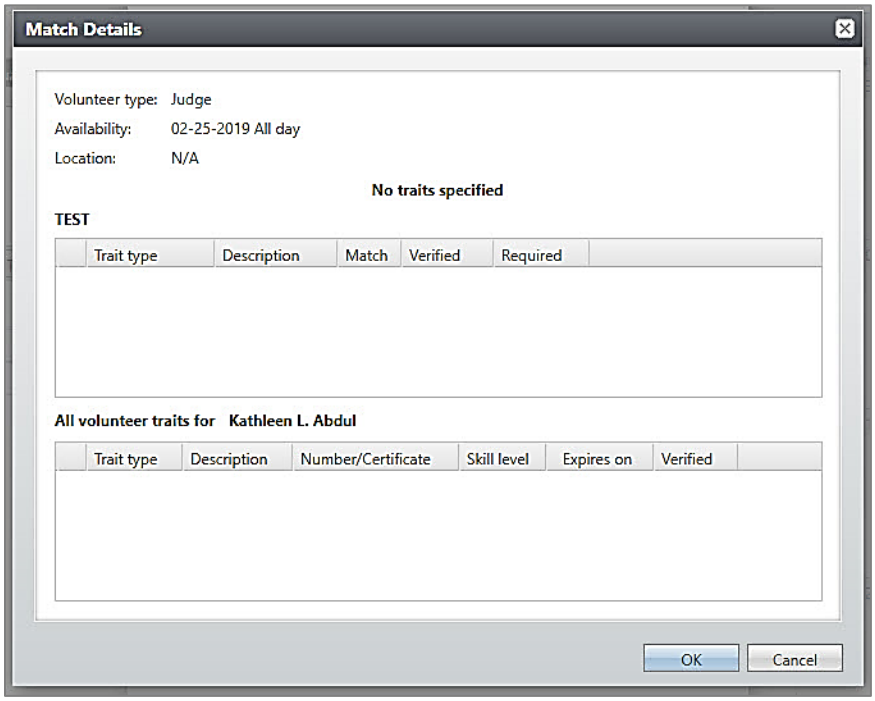
The names of all eligible volunteers for the selected day or days appear in the grid. The grid also displays the percentage at which each volunteer matches the job.

To view volunteer details and verify the match, select a volunteer in the grid and click **Match Details**

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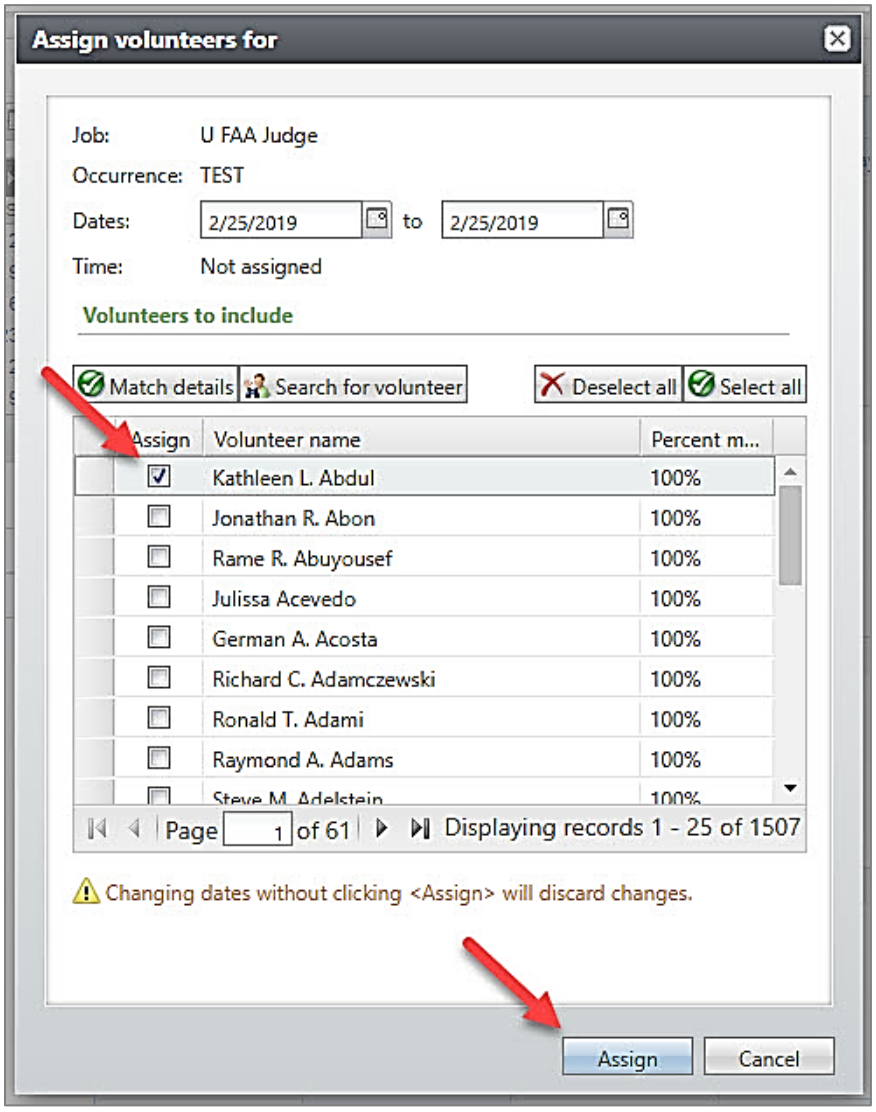
This opens the **Match Details** window.



When you finish viewing match details, click **OK**. Return to the job schedule.

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To assign a volunteer, select the volunteer in the grid and click **Assign**. The program assigns the volunteer to the job and the number of openings for that job is updated.

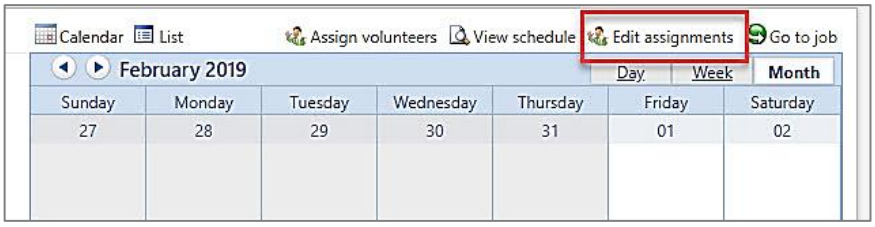
Edit Volunteer Job Assignments

After volunteers are assigned to job occurrences, you can edit those assignments if needed.

Edit the assignments from the Job schedule screen, which you access from a volunteer page, a job page, or the Job Openings page.

Select **Edit assignments**.

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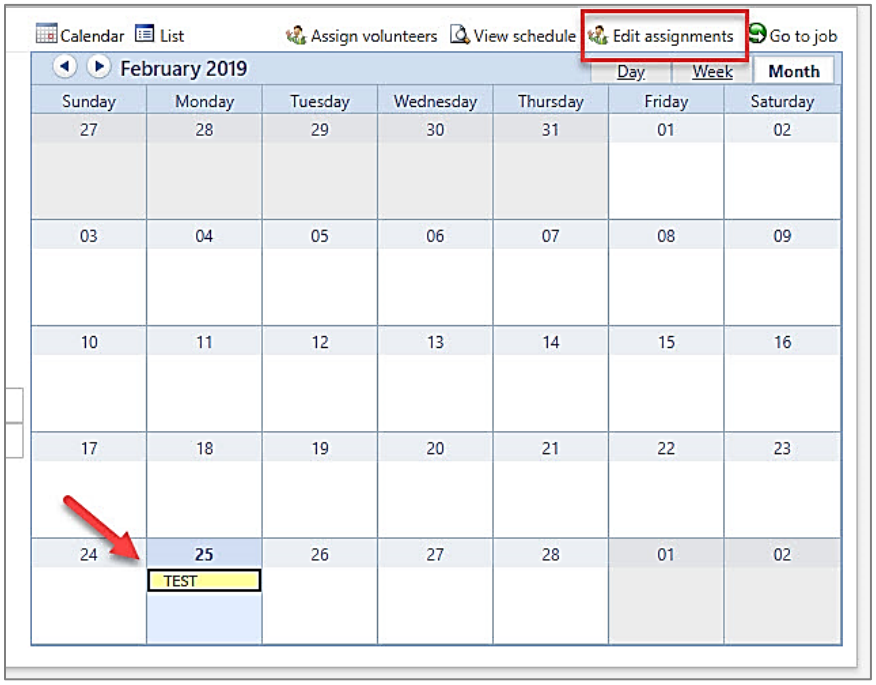
Edit the assignment as needed.

Remove Job Assignments from Volunteers

If there is an error in data entry or the volunteer cannot complete the job after it is assigned, you can easily remove the job assignment from the volunteer.

Remove a job assignment from a Volunteer

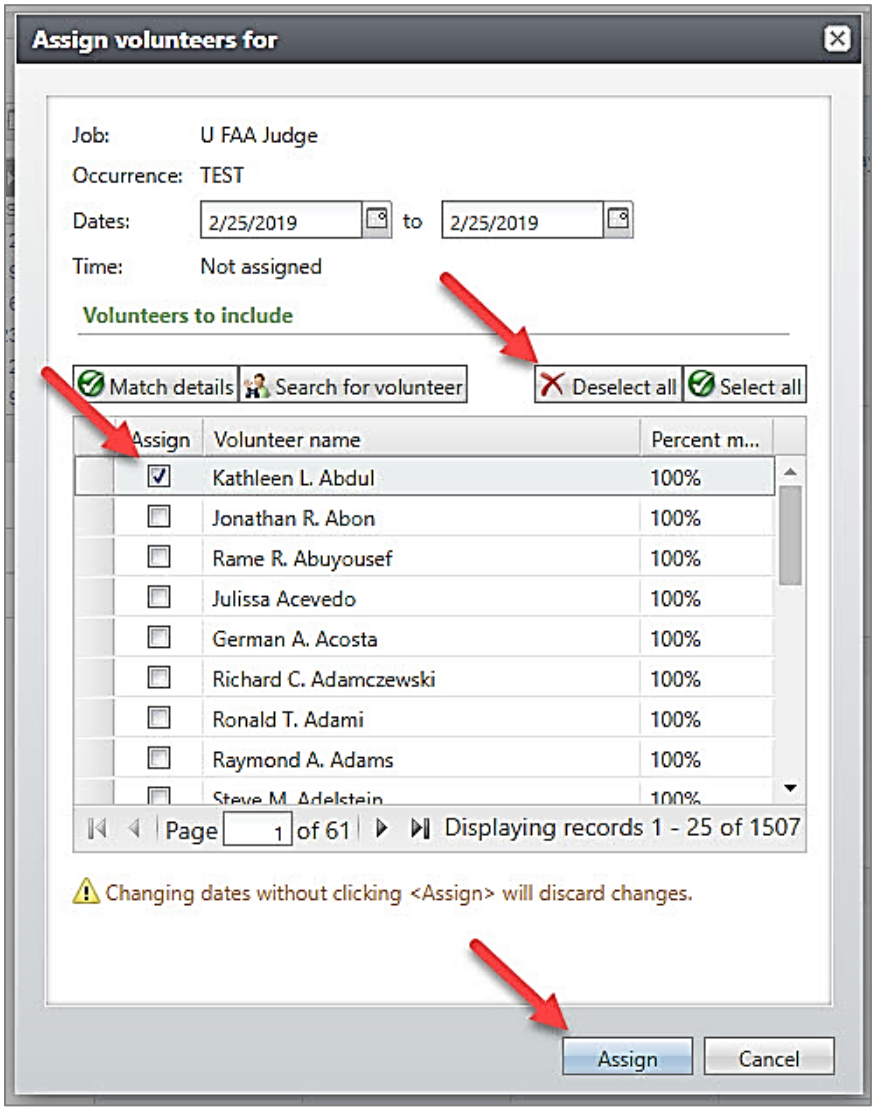
Begin on the job schedule screen. On the calendar day, select the job occurrence and click **Edit assignments**.



The Edit volunteerassignments screen appears. The options and fields when you edit volunteer assignments are the same as when you first assign volunteers.

Either deselect the **Assign** checkbox or select the **Deselect all** option to remove the assignment from the volunteer or volunteers.

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Click **Assign**.

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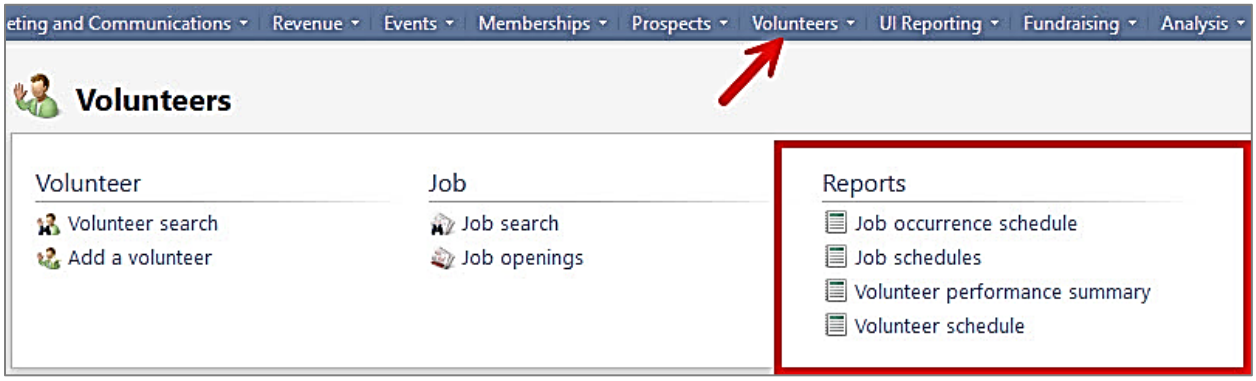
VOLUNTEER REPORTS

DETAILING THE AVAILABLE VOLUNTEER REPORTS

Volunteer reports track information for a specific volunteer or job. These reports help maximize the efficiency of the volunteer program by matching assignment needs with volunteers who have the right skills, availability, and experience. Volunteer reports can generate and print schedules for all jobs, a specific job, or a specific volunteer. Volunteer reports and schedules can assist in maintaining a well-organized volunteer program.

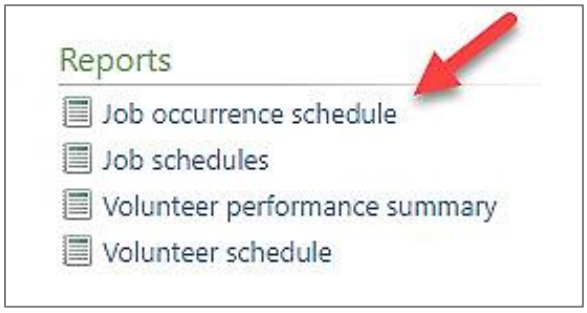
Volunteer Reports

Volunteer reports are found on the Volunteers menu.



Job Occurrence Schedule Report

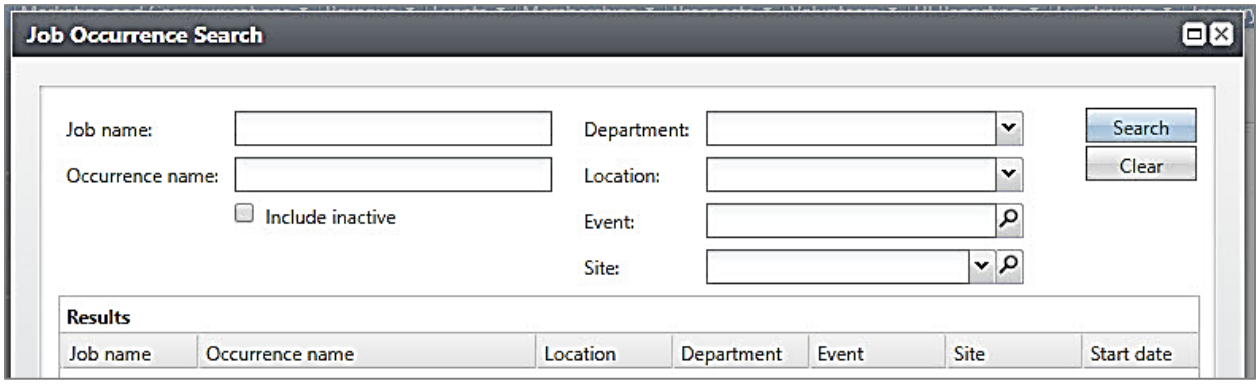
The Job occurrence schedule report displays all dates and assigned volunteers for a selected job. You can indicate a specific date range, such "This week," for a report.



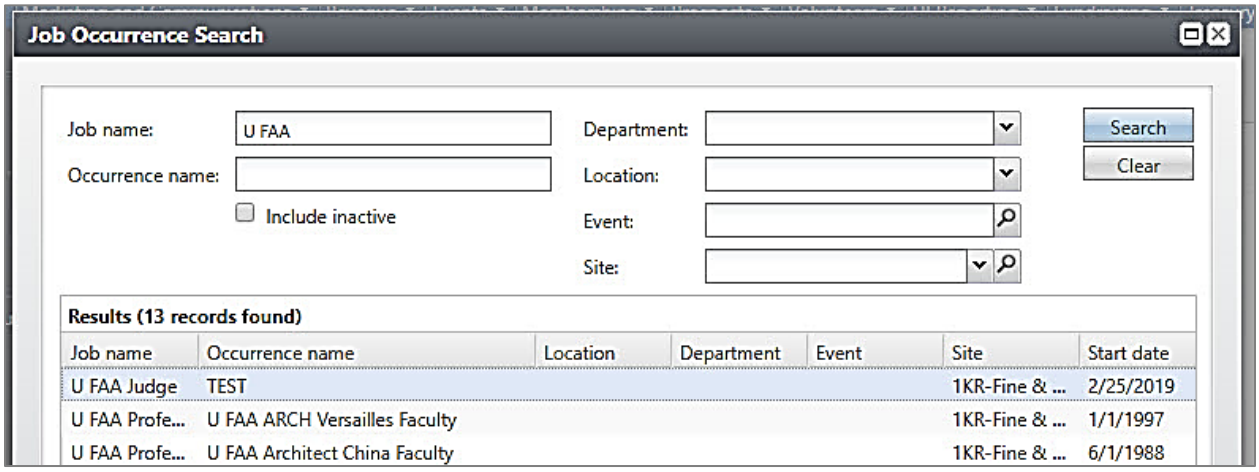
Selecting the **Job occurrence schedule** will open the Job Occurrence search window.

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Select the Job Occurrence using any of the available search criteria fields.



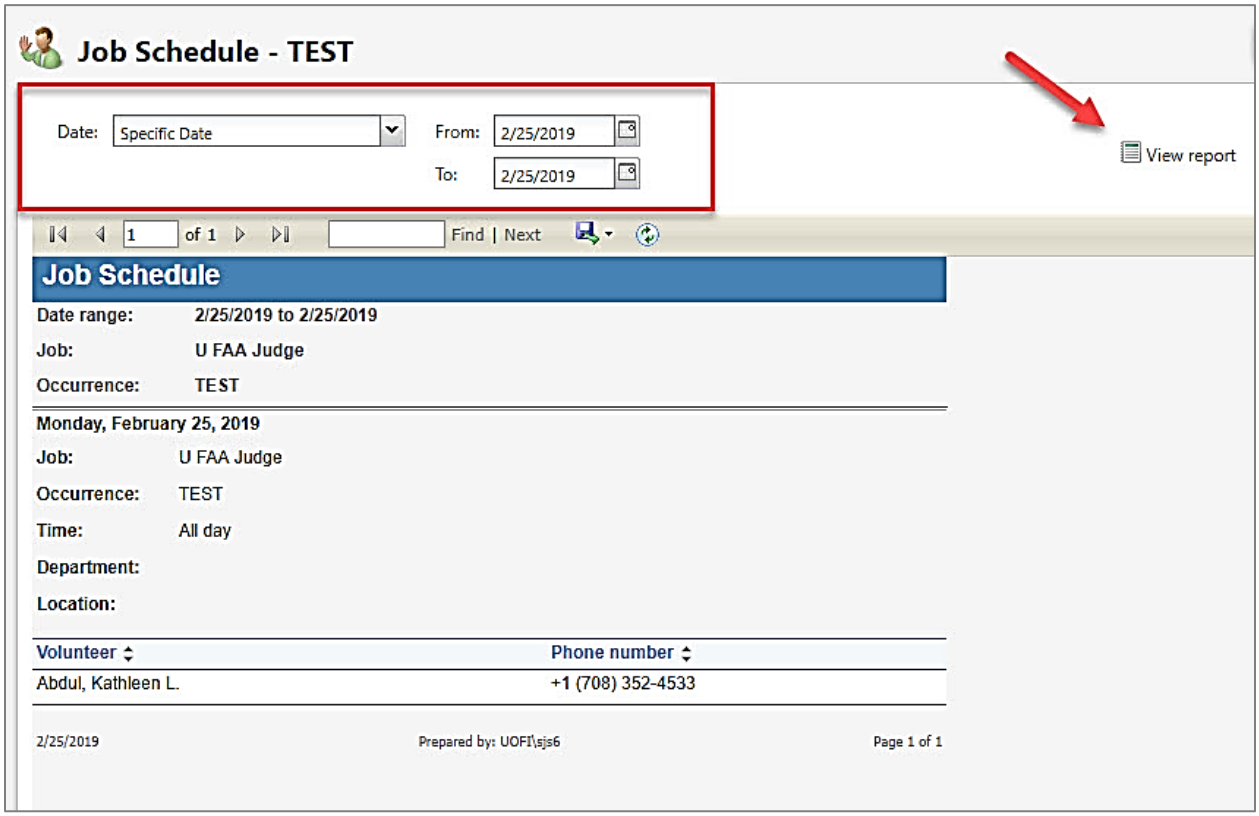
Select the appropriate job.

Once the job has been selected the Job Schedule report will open.

Select the appropriate dates from the available fields.

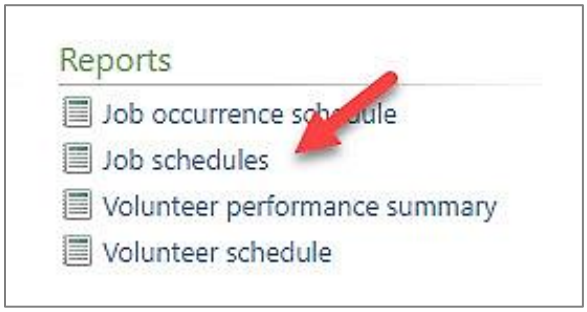
Select **View Report** to run the report.

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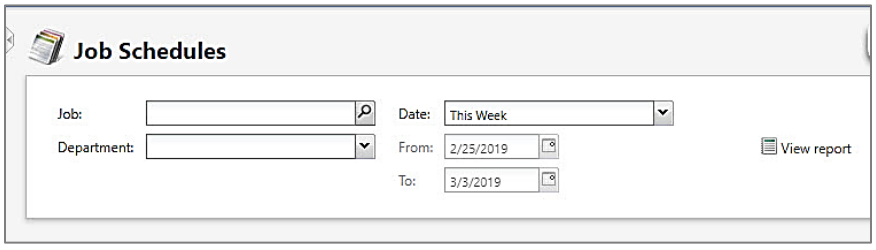


Job Schedules Report

The Job schedules report displays all occurrences of all jobs in the date range and department you select.

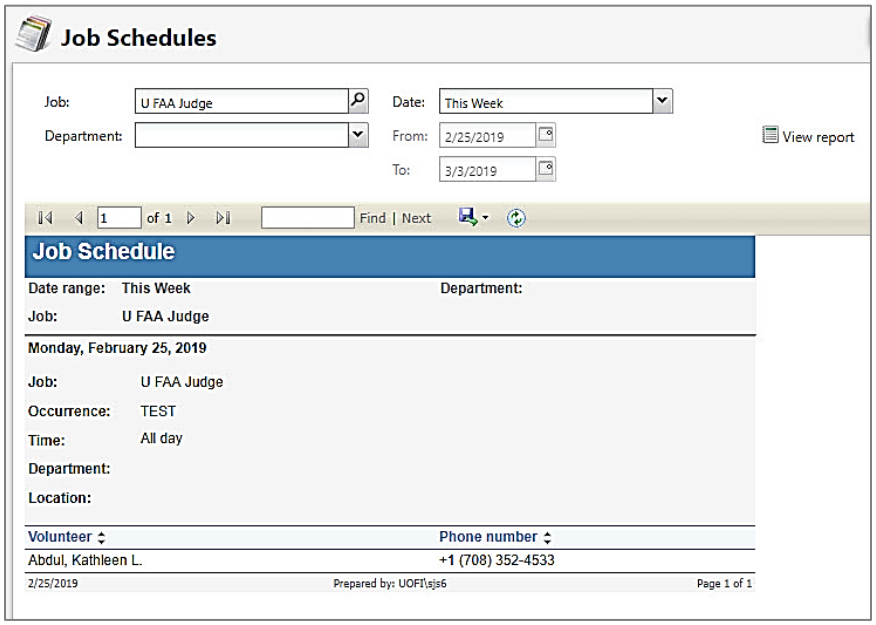


Selecting the **Job schedules** will open the Job Schedules Report.



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Add the appropriate search criteria to the available fields and select **View Report**.



If you do not select a specific job, the report includes all jobs for the date range and department specified.

Volunteer Performance SummaryReport

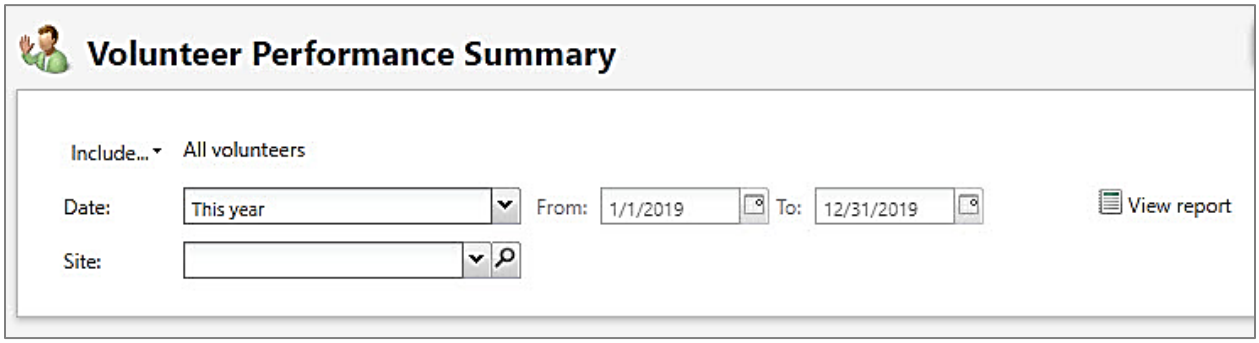
The Volunteer Performance Summary report displays information about a volunteer's activity with your organization for a selected time period and over the volunteer's lifetime with your organization.

The report displays the hours worked by each volunteer for the selected date range and over the lifetime with your organization. For each time period, you can also view the estimated value of the volunteer, based on the jobs the volunteer performed, and the hours worked. The program automatically calculates these values based on the timesheets entered for the volunteer and the estimated values of the jobs.



Selecting the **Volunteer Performance Summary** report.

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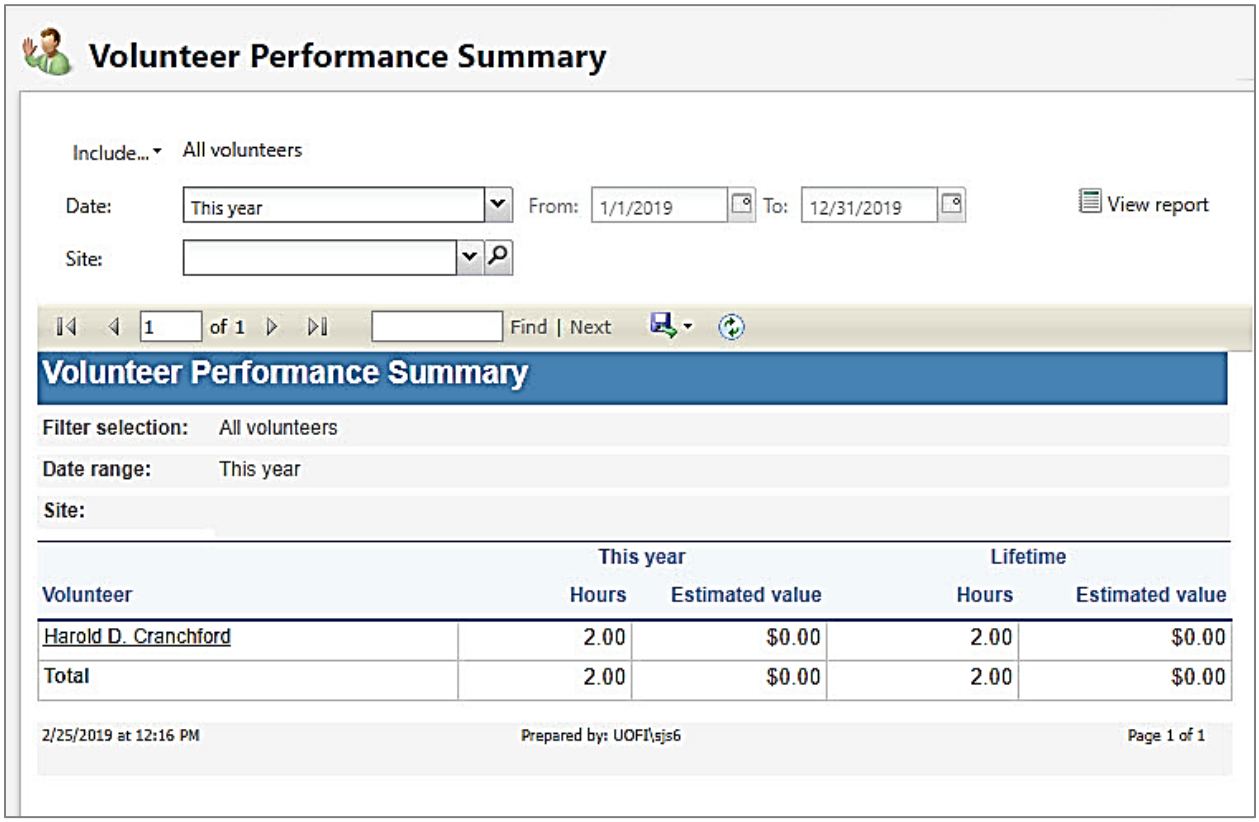
In this search, there is an option to include all volunteers, selected volunteers, or a specific volunteer.



To run the report, select the volunteers and date range to include in the report and click **View report**.

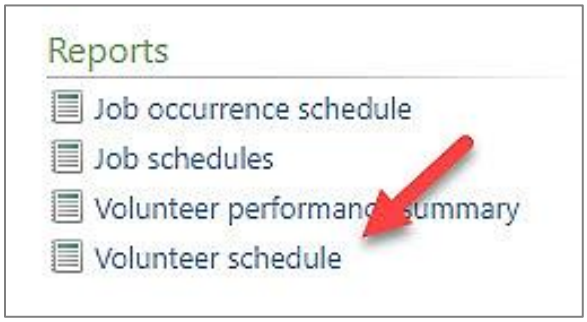
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Volunteer Schedule Report

The Volunteer Schedule report displays a schedule for a specific volunteer.

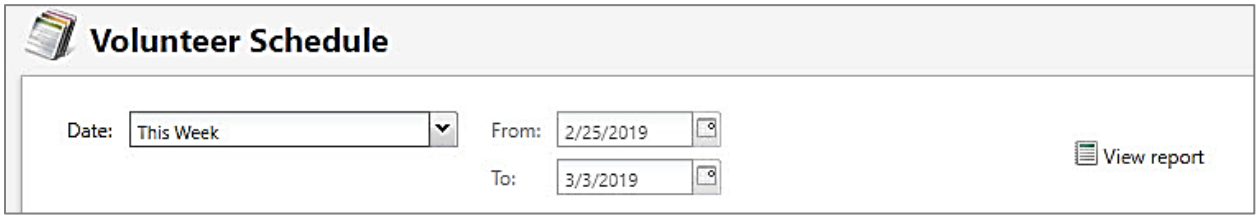


Selecting the Volunteer schedule report will open the **Volunteer Search** window. Use this window to find the constituent for whom you are running the report.

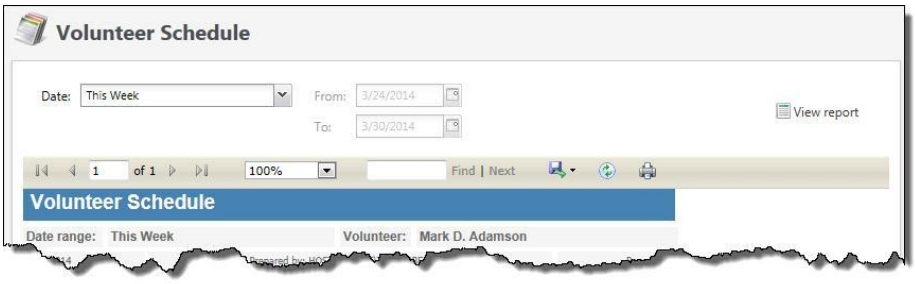
Once the constituent has been selected the Volunteer Schedule report will become available.

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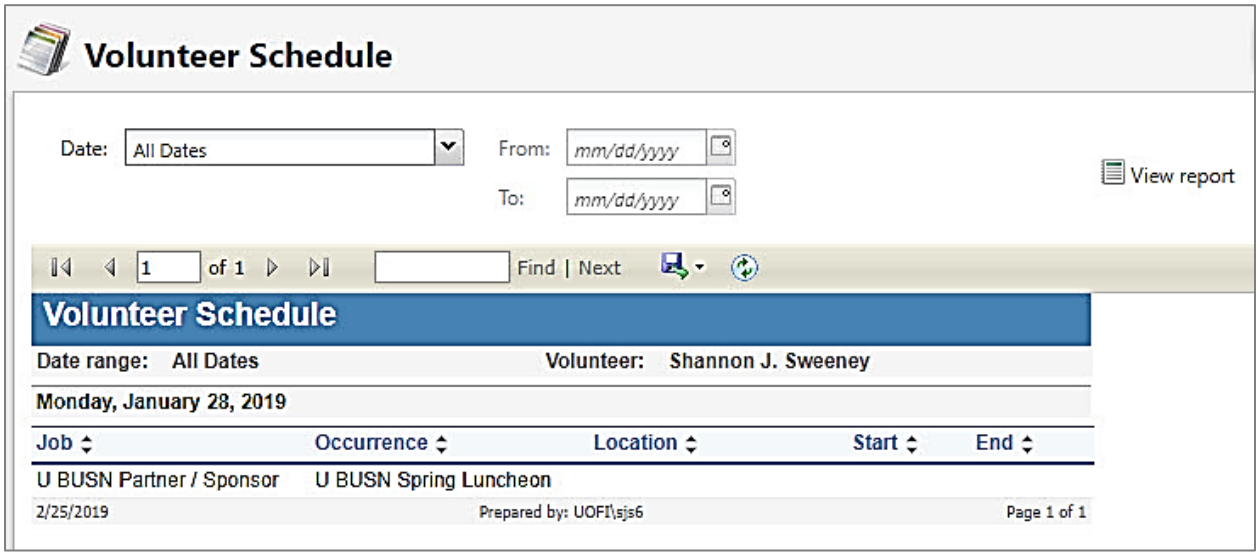
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Select the date range for which to generate a schedule. The schedule includes the date and time of each volunteer assignment and includes the occurrence and location for each job.



To run this report, from *Volunteers*, click **Volunteer schedule** under **Reports**. You can select a date range to filter the results.



UPDATED 3/13/24

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TED VOLUNTEER TERMS

UNDERSTANDING TERMS SPECIFIC TO TED VOLUNTEERS

There are terms specific to the Volunteer area of TED that it is important to know and understand.

General Terms to Know

- A **volunteer** is a person who voluntarily undertakes a task or specialized piece of work for an organization and expects no pay in return.
- A **Job** is a specific type of volunteer work that needs to be completed. There are 17 volunteer types available.
- **Job Occurrences** are the specific dates and times that the volunteer work is completed. This is also the specific name of the volunteer activity.
- Traits are specific skills, interests, special needs, and certification. There can be both individual constituent and job-specific traits

Volunteer Types

There are 17 different volunteer types.

- **Admissions** - Someone assisting with recruiting students to Illinois from a region of the country.
- **Advocate** – Is being updated to Brand Ambassador. Someone willing to speak on behalf of a specific unit or the University. For example, Constituents with a big social media presence willing to share what your specific unit is currently involved in.
- **Award Nominator** – Someone who takes the time to actively participate in the nomination process as it can be lengthy at times.
- **Career** – Is heavily related to students. Someone willing to assist students in preparing them for a career such as participating in mock interviews, allowing a student to shadow him or her at work, or being willing to discuss careers in his or her field with students.
- **Event Staff** – Is primarily internally facing but doesn't have to be. Specifically, if the constituent is willing to volunteer to participate in the Event in a capacity other than speaker, mentor, etc.
- **Hiring/Recruiting –** Someone who is willing to recruit or hire for their employer.
- **Host** - Someone willing to host an event in that region, at their country club or home or willing to underwrite a significant portion of the event bill. Specifically used with Campaign events.
- **Illinois Connection Advocate (UIAA) -** Is unique to the Illinois Connection program.
- **Judge** – Someone willing to judge. For example, CASE competition judges, mock trial judges, or engineering open house judges.
- **Life Members (UIAA)** – Is not currently being used and will eventually be removed from this list.
- **Mentor** - Someone willing to mentor.
- **Miscellaneous / Other** – Someone whose volunteer participation doesn't fit with any other type.

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- **Partner / Sponsor** - Organizations helping students in a way other than a financial donation. Such as companies sponsoring a student organization that is an independent 501(c) student organization.
- **Phone-a-Thon / On-Air Personalities -** Often used for Thank-a-Thons or public radio.
- **Professor of Practice / Executive-in-Residence/Preceptors**– Professionals who come back to speak in a classroom or one class for an extended period of time (not an adjunct for the faculty but is here working with a particular class on a particular project).
- **Speaker / Facilitator** - Panel leads, speakers, or keynote speakers. If a constituent is listed as a registrant of an event and not as a volunteer speaker/ facilitator there is no way to show that he or she has taken the time to prepare and present a speech.

Volunteer Traits

At the time of the creation of this documentation, only specific traits are being used. As this area becomes more developed these traits will assist in matching the abilities of the volunteer to the needs of the job.

- Administrative – Not currently in use.
- Certificate – Not currently in use.
- Course – Currently only IB Career Success is available.
- Interest – Not currently in use.
- License – Not currently in use.
- Medical – Not currently in use.
- Skill – Current available skills:
    - Bartending
    - Fluent in Mandarin
    - Fluent in Russian
    - Fluent in Spanish
    - Hosting
- Special Need – Not currently in use.

REVIEWED 12/6/24

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MARKETING AND COMMUNICATIONS (Blue Navigation Bar)

Documentation to be Determined

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PROSPECT MANAGEMENT (Blue Navigation Bar)

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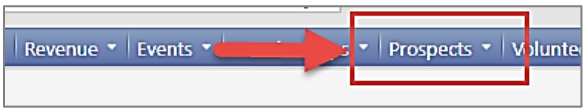
PROSPECT MENU OVERVIEW

ADDITIONAL TOOLS FOR FUN-TABDRAISERS

Prospects Menu

The Prospects Menu contains links to fundraising tools an advancement officer may find useful.

Prospects Menu



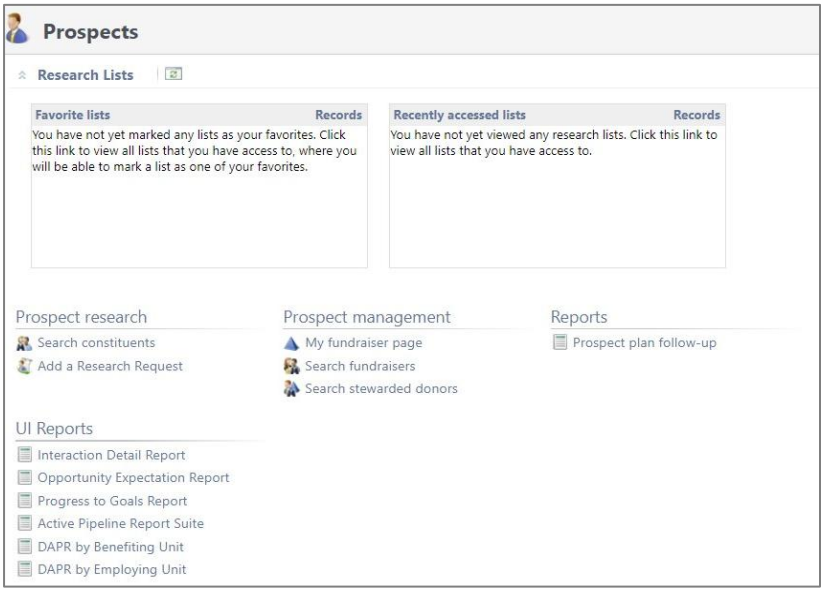
Click the Prospects menu option in the navigation bar to load a page with all available tools. You can also click the dropdown icon to the right of the Prospect menu title to display the most commonly-used tools without loading the entire menu.

Reading the Prospects Menu

The Prospects Menu is generally divided into five main sections:

- Research Lists
- Prospect research
- Prospect management
- Reports
- UI Reports

Depending on a user's role, there may be additional sections, such as Configuration.



Research Lists

The **Research Lists** section links to prospect lists generated by the UIF Research and Portfolio Management (RPM) team. This section is currently being used by RPM only. If you have any questions, please reach out to your unit's RPM liaison.

Prospect Research



The **Prospect Research** section links to constituent search and to file a research request. However, fundraisers are discouraged from using this research request link because it requires an additional search to add donors to the request form. Instead, fundraisers are advised to file research requests directly from a constituent's individual record because that workflow automatically adds the constituent to the research request form.

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Prospect Management

The **Prospect Management** section displays links that are useful in the fundraising process. This includes viewing and editing a fundraiser's own portfolio from the Fundraiser page, using the Fundraiser on the Go option to view TED from a mobile device, or seeing the overall development work being done by their unit and university.



Fundraisers can click the **My fundraiser page** link to go directly to their Fundraiser page and see multiple tabs displaying information relevant to their portfolio, pending step, prospect strategy, and attention tabs to ensure portfolio management is compliant with UI System policies and practices.

Fundraisers can view active stewardship plans by clicking on the **Search stewarded donors** link.

Reports

A variety of reports related to portfolio engagement and management are displayed in the **Reports section**. These reports cannot be accessed via the UI Reporting tab.



UI Reports

A variety of reports related to portfolio engagement and management are displayed in the **UI Reports section**. These reports and more can also be accessed via the UI Reporting tab.



Configuration

The **Configuration** section allows users to customize and utilize various prospect management tools applicable to their role.



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PROSPECT PLANS ON COMMITTEES

HIGH LEVEL OVERVIEW

Much of major gift fundraising work centers on developing a relationship with a household or organization. As such, most of our documentation for plans focus on the mechanics of working with households and organizations. However, there are legitimate use cases for managing a prospect plan on a group of people when they act as a single entity.

Committee Definition

In TED, a committee consists of multiple people or organizations that managed or treated collectively. Some examples of committees are:

- University of Illinois student engagement, such as registered student organizations (RSOs) or student athletics.
    - Examples: U DIA Men's Ice Hockey; C Alpha Phi Sigma
- Non-governing boards and committees, both internal and external to the University
    - Examples: C DENT Strategic Advisory Board; S Memorial Medical Center Board
- Other groups and clubs, such as alumni club leadership or accelerators
    - Examples: U MEDIA Leadership Council; C Friends of the Arts; S SAFFR Community Garden Club
- Recognition awards that are **not** funded through donor funds, such as internal University awards or external awards that are well-known to the general populace
    - Examples: S Loyalty Award; U LAW Distinguished Alumni Award: UIAA Illini Comeback Award; Grammy Award; Academy Award

Plans with Multiple Participants vs. Plans on Committees

Prospect plans can involve interactions with multiple people in service of the plan's objective. When a single plan involves multiple people, you will need to determine whether there is a **primary donor** (with other people involved as decision-makers, advisors, or support) or a **group of people collectively treated as a single entity**. Placing the prospect plan on a committee makes sense for the second case.

Example 1

Elsa is a potential donor for the U SAFFR unit. However, she runs all her financial decisions by her brother, Brad, and she will not make a major gift without his approval. The fundraiser is aware of this dynamic and realizes that Brad will need to be included in the qualification and cultivation of Elsa's gift, even though Brad is not a viable prospect himself. In this scenario, the prospect plan should be placed on Elsa's record, and Brad should be added as a plan participant.

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Example 2

Cliff, Kelvin, and Maggie are a tight-knit group of friends that met at the University of Illinois and hold UIUC in great esteem. They live in the same city and see each other often. The same fundraiser works with all three and discovers they are interested in supporting a new UI initiative. The three friends plan to donate to the program, but their interests are not dependent. Each will donate on their own timeline and independent of what the others do. In this scenario, separate prospect plans should be placed on Cliff, Kelvin, and Maggie's records to manage each relationship independently.

Example 3

Thanks to an enterprising fundraiser, the U FAA School of Architecture Advisory Board agrees to collectively make a gift, with each member donating a set amount. While the donations will be made individually (since the advisory board is not a legal entity), each board member is participating with the understanding they are acting in concert. In this scenario, the committee is treated as a single entity, and the prospect plan should be placed on the committee's record. Creating a single plan to hold all the related information makes it easier for the fundraiser to manage the associated work. In addition, each committee member should be added as a plan participant, which will allow the related committee plan to surface when viewing an individual board member's constituent record.

Requesting Committees

Most RSOs and other group prospects should already exist as committees in TED. However, if you need to engage a group that does not exist as a committee, you can request one by following these instructions.

1. Login to https://support.uif.uillinois.edu
2. Click Advancement Support
3. Fill in your name, email address, and phone number
4. Enter a brief description of what you need in the Short Description field.
5. For the Category drop down, choose 'Data Services'
6. For the Type drop down, choose 'I have a list/need an update'
7. For the Item drop down, choose 'Committee: CREATE'
8. Fill out any additional fields.
9. Click submit at the top

Adding Plans to Committees

When working with a committee prospect, add the prospect plan to the committee record so other TED users can see the plan when they view the committee. You should also add each committee member as a plan participant to the prospect plan; doing so will allow the committee plan to surface when viewing an individual member's constituent record.

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Gift Credit and Associated Revenue

Since committees are not legal entities, they cannot receive gift credit. Instead, each legal entity (e.g., individual) that makes a gift on behalf of the committee will receive gift credit.

Many major gifts involve a single transaction (an outright gift or a pledge agreement), and the revenue is easily associated with the corresponding opportunity. In the case of committees, a group of people will make individual gifts. Each gift transaction can be associated with the same opportunity. Since multiple gifts for a single opportunity is an exception to our typical processes, you will need to request revenue association for the group of transactions by filing a research request in TED.

REVIEWED 2/20/2025

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PROSPECT PLANS OVERVIEW

HOW DO YOU FIND AND READ A PROSPECT PLAN

Plans in TED are used to document and preserve the strategic actions undertaken by advancement officers in a clear and concise manner. Prospect plans detail the planned or completed work necessary for fundraisers to engage, qualify, cultivate, solicit, and steward donors.

Other documentation is available for working with and managing large-scale, repeatable stewardship (typically related to stewardship of funds) by using stewardship plans.

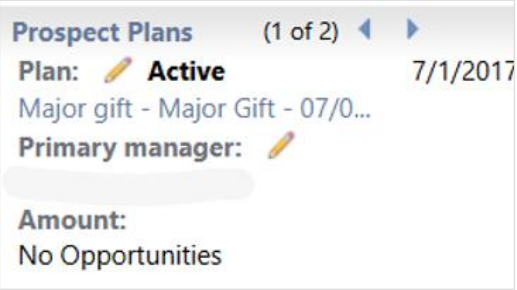
Accessing a Prospect Plan

There are several different ways to access a constituent's prospect plan.

From the Prospect Plans Summary Tile

Both the individual and household records display the **Prospect Plans** summary tile at the top of the record. This tile displays both active and historical plans whether there is an opportunity associated with the plan or not.

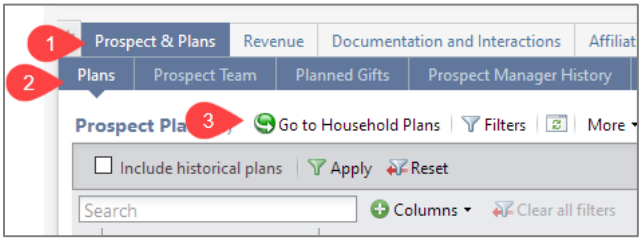
Use the right and left arrows to cycle through the plans. Click the hyperlinked plan name to open the plan record.



From An Individual Constituent's Record

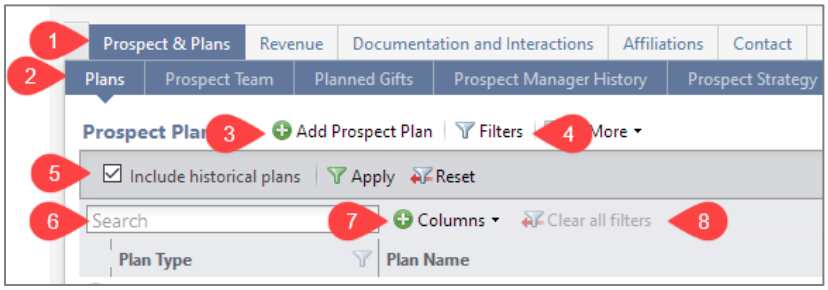
To ensure you are seeing all plans, navigate to the household record.

1. Select the **Prospect & Plans** on the Individual record.
2. Select the **Plans** sub-tab.
3. Click the **Go to Household Plans** button.



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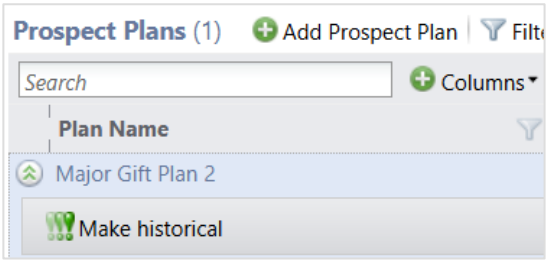
From the Constituent's Household Record



1. Select the **Prospect & Plans** tab on the household record.
2. Click the **Plans** sub-tab to view active prospect plans.
3. Clicking the **Add Prospect Plan** button opens a new window from which a new prospect plan can be created.
4. Select **Filter** to display or not display historical plans.
5. Filter Options are displayed when Filter has been selected.
    - Selecting the **Include historical plans** checkbox will update the plan list with any prospect plans that have been made historical. Historical prospect plans will appear in italics in the list.
    - To apply the Include historical plans options, select **Apply**.
    - To remove any applied Filters, select **Reset**.
6. Add text to the **Search** option to filter the plans list by specific information such as a Plan Name.
7. Use the **Columns** menu to hide or show columns as desired. Select **Apply** to update the screen with the selected columns.
8. Click the **Clear All Filters** button to remove any filters applied.

Expanding the Plan

Clicking the **double chevrons** next to the Constituent name expands an action menu. Active plans show a button to **Make historical**, and historical plans show an action to **Make active**. A plan cannot be made historical if it has pending steps or an open opportunity.



Reading the Plan Record

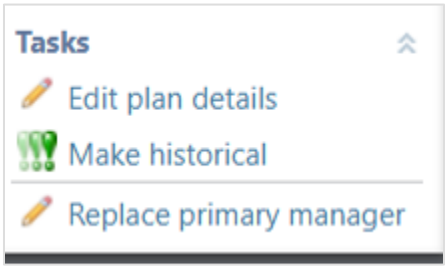
Plan names are displayed as hyperlinks and clicking them opens the plan record. The plan record can be divided into three areas: **Task Options, Plan Details,** and **Activity Details**.

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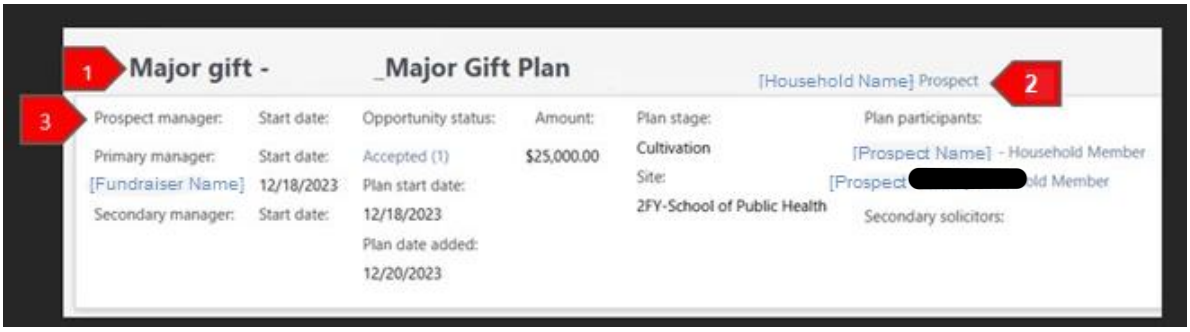
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Task Options

The **Tasks** menu in the left sidebar allows fundraisers to make changes to specific areas of the plan, like updating the associated site or replacing the primary plan manager. Gift officers should work with their unit's Prospect Development Analyst (UIF Research and Portfolio Management) prior to making any changes to the Primary Plan Manager or Secondary Solicitor on an existing plan.

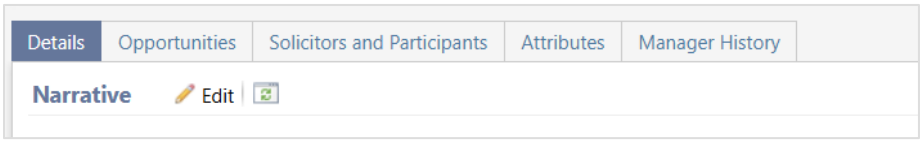


Plan Details



1. The prospect plan name.
2. Click on the hyperlink of the household name to open a drop-down list of the active prospect plans that are on the household.
3. This area displays core information about the prospect plan: the primary plan manager, plan participants, secondary solicitors, and the site associated with the plan.

Activity Details



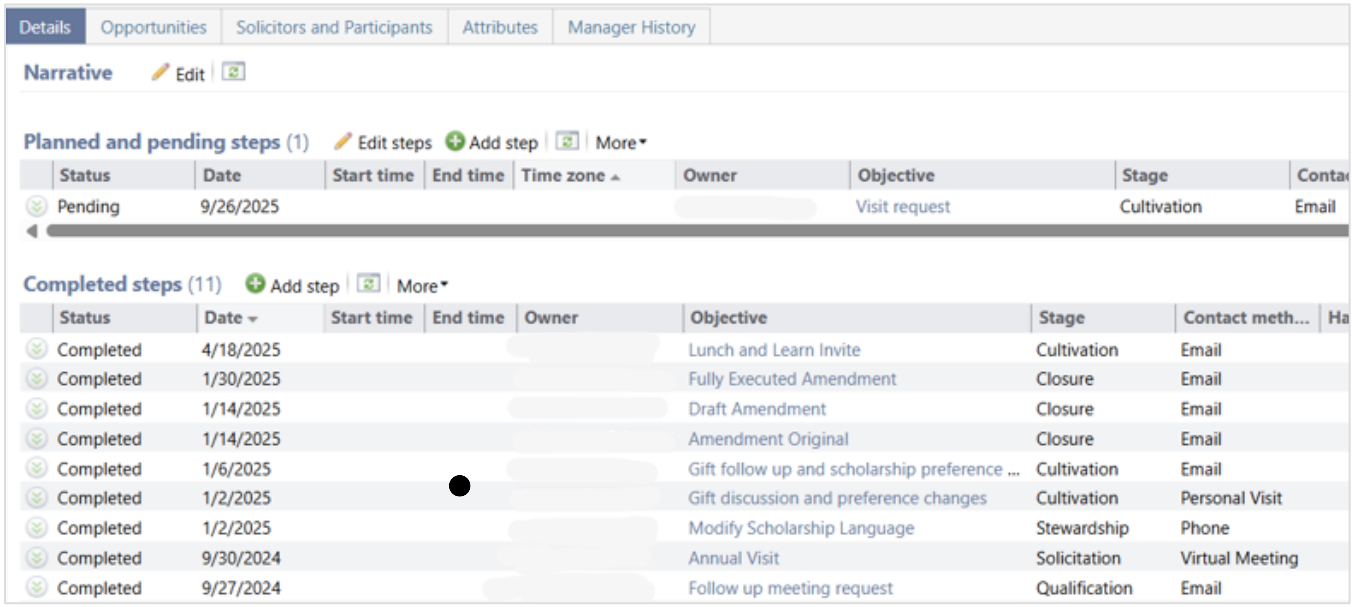
1. The **Details** tab displays information on the fundraiser's strategy for the prospect plan.
2. The **Opportunities** tab displays information on the solicitation associated with the prospect plan.
3. The **Solicitors and Participants** tab displays any current or former secondary solicitors and plan participants.
4. The **Attributes** tab is not currently in use.
5. The **Manager History** tab displays any former primary managers for the prospect plan.

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Details

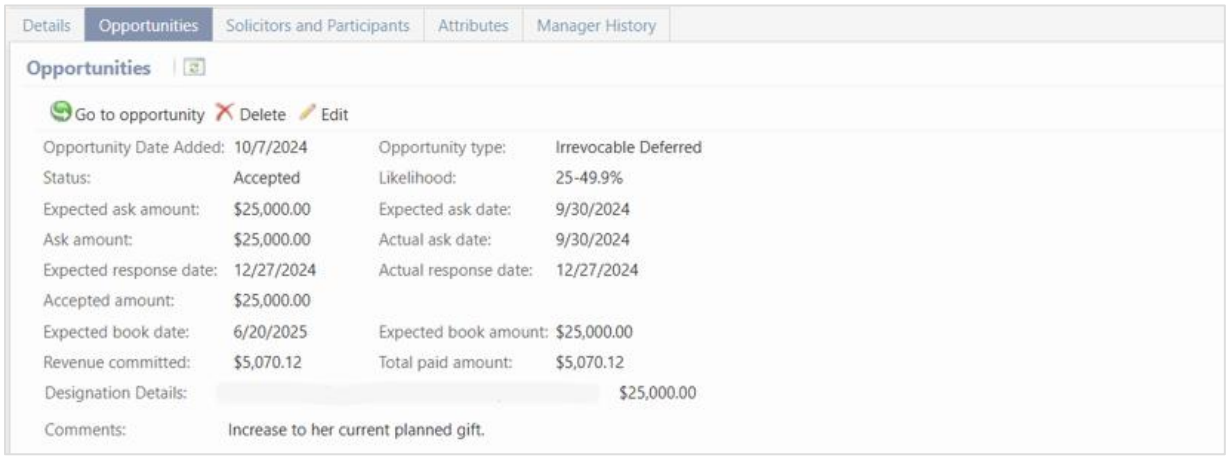
The Details tab displays the plan strategy, and the details of completed and planned activities in the form of plan steps.



1. The **Narrative** contains a description of the prospect plan. This makes it simpler for the team to communicate an overall strategy for the entire plan.
2. The **Planned and pending steps** section displays the strategic actions the fundraising team is taking to cultivate and manage a relationship with the constituent.
3. The **Completed steps** section displays the strategic actions the fundraising team has already performed.

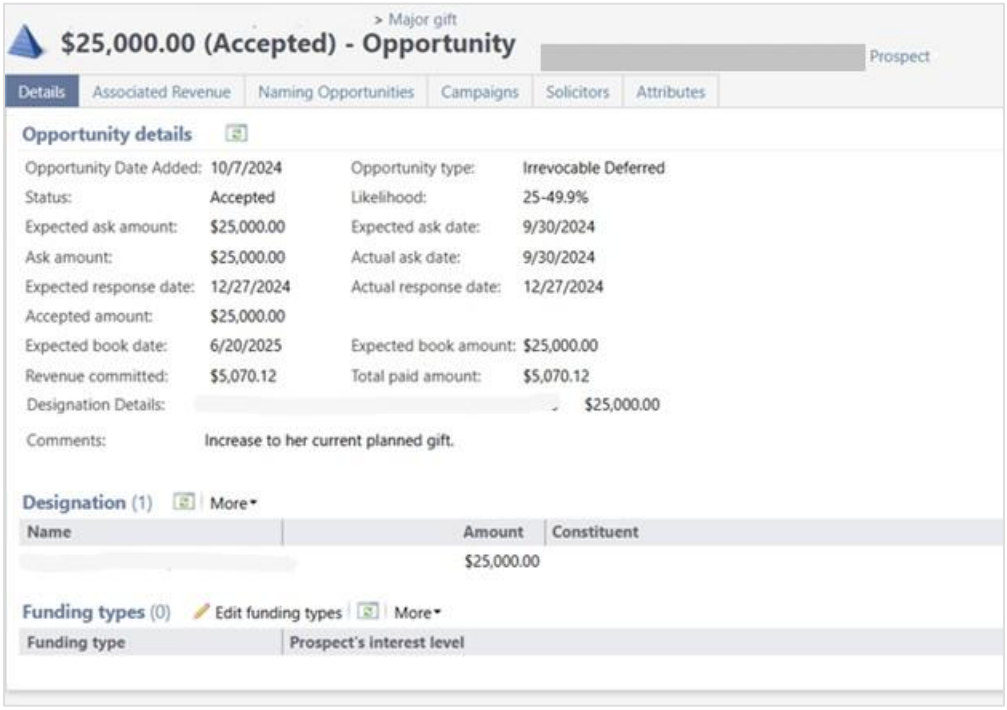
Opportunities

The **Opportunities** tab displays information about the solicitation associated with the prospect plan.

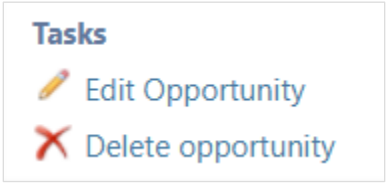


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The Opportunities tab displays information on the solicitation. Clicking the **Go to Opportunity** button opens the opportunity record:

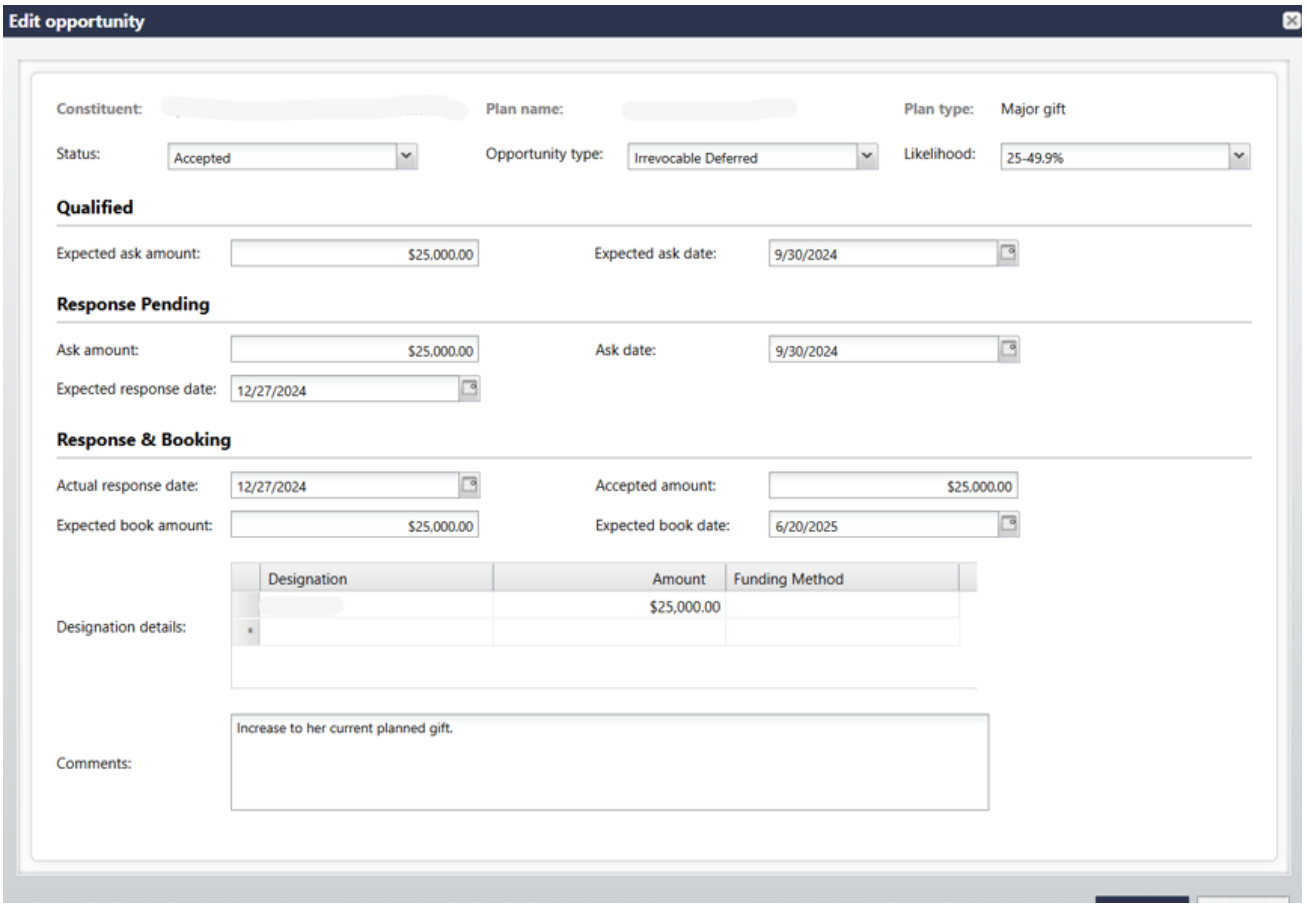


Once in the opportunity, clicking the **Edit Opportunity** button in the left sidebar will open the **Opportunity Smart Form, where the details of the opportunity can be added or edited**:



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Opportunity Smart Form

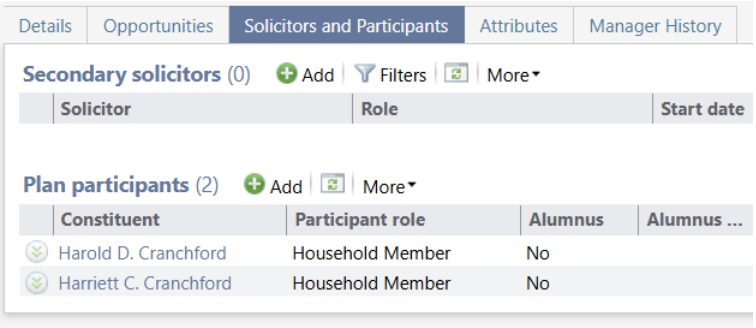


The **Opportunity Smart Form** is an improved process for adding an Opportunity to a Plan. This form now allows the fundraiser to input information about their solicitation on a Plan with guidance on which data should be added (or need not be added) depending on the Opportunity Status. The intention of this form is to improve data integrity for active pipeline reports, reduce fundraiser time spent correcting asks to get revenue associated per policy, and reduce staff time spent auditing/cleaning data.

Solicitors and Participants

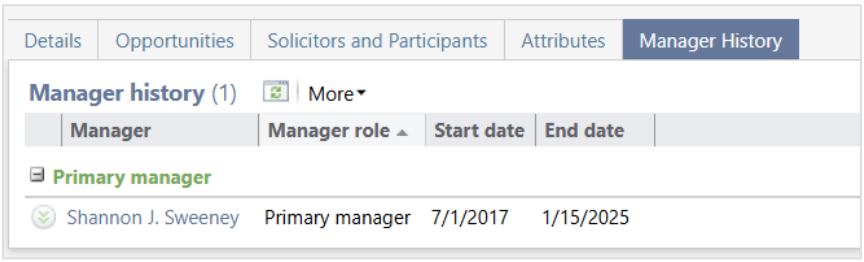
The **Solicitors and Participants** tab displays any current or former secondary solicitors and plan participants.

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1. The **Secondary solicitors** section will display any additional advancement staff associated with the plan. Secondary solicitors can be added when the plan is created or later depending on need.
2. The **Plan participants** section displays any non-advancement constituent the fundraiser has added to the plan, and this may include people internal or external to the University of Illinois. An automated process runs Monday through Friday to add all members of a household to active prospect plans as plan participants with the Household Member role. If household members were mistakenly given a different plan participant role, this process will also correct that. Additional plan participants can be added and given appropriate roles as needed.

Manager History



The **Manager History** tab displays any former primary plan managers for the prospect plan. *Note*: A Primary Manager role is not to be end dated without first replacing the Primary Manager.

UPDATED – 4/23/2025

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PROSPECT MANAGEMENT DEFINITIONS

UNDERSTANDING INDUSTRY LINGO AND TERMS

Understanding the terms associated with Prospect Management can go a long way towards ensuring that prospect plans and opportunities are used effectively.

General Terms

A **Plan** is a record in TED of tasks and interactions aimed towards a defined objective for a specific constituent, such as the fundraising of a specific gift, strategic engagement with a person or organization, or stewardship of a donor. Work for separate objectives should be tracked on separate plans. Plans have a time-limited nature; once the plan's objective is completed or abandoned, the plan should be made historical.
By policy, plans are placed on the **Household Record** regardless of whether the constituent is married or single. By policy, all CFR plans are placed on the Primary Organization record.

Plan Steps are any action that moves the relationship forward or is part of the fundraiser's strategy. Plan Steps details the activities the fundraiser performs during the implementation of their strategy. This information includes planned actions such as meetings or phone calls, completed actions that include contact reports, and any tasks, like documentation, that the fundraiser may need to perform in order to complete the plan. Specific step types or content may be associated with the fundraiser's yearly goals or metrics.

Contact Reports are used to document interactions and communications with constituents. Contact Reports are entered in Plan Steps.

An **Opportunity** holds all the information related to asking for a gift—when was the ask made, how much was asked for, what designation will the gift support, and more.

Prospect Management Roles

Primary Plan Manager is the advancement staff member responsible for directing the plan strategy for a prospect, documenting, and updating the plan strategy in TED, and serving as the key point of contact externally with the prospect and internally with staff regarding implementation of this plan. A Primary Plan Manager is required for every plan.

Prospect Manager is responsible for the coordination of the overall strategy on high-value prospects, and for the coordination of multiple active plans on a single prospect. A prospect manager is required and assigned only when at least one of the following criteria is true:

1. A prospect meets the criteria for the Principal Gifts Program.
2. The prospect has a UIF Board Director constituency.
3. The prospect has a Current UI Trustee or Former U of I Trustee constituency.
4. The prospect has active plans managed by advancement officers in different units.

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Please note that **Plan Managers** and **Prospect Managers** may or may not be the same person depending on the needs of each plan.

Secondary Solicitor is an advancement staff member actively involved in the cultivation, solicitation, or stewardship of a prospect. All Secondary Solicitors must be given one of the following roles:

Academic Administration – University President, Chancellors, Provosts, and Deans.

Alumni Relations Officer – Alumni relations staff members who are heavily involved in developing or executing the strategy for the prospect.

Corporate Fundraiser – Gift officers or Corporate officers who manage long-term strategic relationships with organizations, corporations, or foundations.

Gift Planning Officer – Gift planning staff members who are involved in developing or executing the strategy for a planned gift.

Marketing / Communications Officer – Marketing or communications staff members who are heavily involved in developing or executing the strategy for the prospect.

Frontline Fundraiser – Gift officers who meet the criteria for when secondary solicitor roles should be added, per the UIDP policies/procedures.

Stewardship & Donor Relations Officer – Stewardship and donor relations staff members who are involved in developing or executing the stewardship strategy.

Plan Participants are all other entities involved with the plan. They may be external (such as the constituent donors, their attorneys, and associated businesses), or internal (such as UI faculty members). When a plan is added to a household record, the household members are automatically added as plan participants.

Attorney – A legal attorney or other legal advisor.

Decision Maker – An additional decision maker in the agreement to accept the Ask. This role is not the same as Household Member. The decision maker is in addition to the household member or the Organization member.

Faculty Member – A campus faculty member involved in assisting with the plan.

Financial Planner – The potential donor's financial advisor.

Foundation Family Member – A member of the Family Foundation.

Household Member – The potential donor that will accept or reject the Ask. This role is automatically assigned to any household member in an automated process that runs Monday through Friday. This process will also update any members of the household who have been assigned a different role to the role of Household member. Though this role is automatically assigned, it is still available in the drop-down menu for functional purposes.

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Organizational Member – The potential organization donor that will accept or reject the Ask. This role is required on all prospect plans for organizations. There may be multiple organization members involved in one plan.

Other Influencer – Any other person that is involved in the aid of getting the potential donor to agree to the Ask.

Relative – A relative of the potential donor that is not considered a decision maker.

Prospect Management Plan Stages

Prior to beginning a plan, the constituent must be assessed for:

- Affiliation with the fundraiser's unit
- Any other active plans on the record
- Any other gift officer is currently in contact with the constituent.

Assessment – During the assessment stage, a prospect is reviewed by UIF Research & Portfolio Management for affiliation with specific advancement units or fundraising priorities. After the giving capacity and contact information have been reviewed and reassessed, a prospect is referred to the areas within advancement that best align with prospect's demonstrated or suspected philanthropic interests. An affiliation-scoring model, engagement index scores, interaction history with UI, and completed research are all factors that contribute to a prospect referral. Affiliation determines the pool that the prospect is assigned to but is not necessarily a reflection of the prospect's inclination to give to that area.

Qualification –During the qualification stage, the gift officer validates a prospect's capacity and inclination to make a gift. If successfully qualified, the gift officer moves the prospect to the cultivation stage. If the fundraiser determines the prospect should be disqualified, they add a Qualified, Not a Prospect (QNP) plan step with supporting details in the contact report.

Cultivation – During cultivation, the gift officer develops a prospect's readiness to make a gift by identifying giving priorities, clarifying the impact a prospect wishes to make, and helping to establish a giving range ($) and reasonable timing of the gift. The gift officer deepens the prospect's relationship with the institution through the exploration of meaningful ways to engage with and support the University of Illinois. Although the timeline may be shorter or longer, cultivation typically lasts less than 18 months.

Solicitation –During solicitation, the gift officer presents a proposal and/or asks for a gift from the prospect. Once a prospect verbally accepts a proposal or request, they move to closure.

Closure – During closure, a donor has verbally indicated their commitment to making a gift. This stage includes steps where the gift officer informs or reminds the donor of expected next steps, determines the donor's type of gift vehicle, and finalizes documentation of the gift. UIF will receive and/or document the donation during this stage. Once the gift revenue is tied to the opportunity, closure is complete and the donor will move into stewardship if such activities are necessary; otherwise, the donor may move into requalification for the next major gift.

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Stewardship – During stewardship, a gift has been made by the donor and there is a time-specific plan developed by the gift officer and/or advancement team members to ensure active communication and engagement with the donor regarding their gift or overall interest in the University of Illinois. The donor may move out of stewardship into requalification for the next major gift.

Types of Prospect Plans

All prospect plan types should be made historical once the plan's objective has been completed or abandoned, and no more work needs to be completed.

- **Qualification** – Determining whether a prospect is qualified as a donor. Please note UIC does not use qualification plans; qualification is tracked as a stage.
- **Major Gift** – Cultivating and soliciting donor prospects for gifts greater than or equal to $25,000.
- **Principal Gift** – Cultivating and soliciting donor prospects for gifts greater than or equal to $5Million.
- **Leadership Annual Giving** – Soliciting a donor prospect for gifts between $1,000 and $24,999.
- **Campaign Ask Expectancy** – Determining the specific and total opportunities remaining for a prospect through the duration of the comprehensive campaign.
- **CFR Solicitation** – For soliciting organizational gifts from organizations, corporations, or foundations.
- **CFR Engagement** – For the long-term strategic management of relationships with organizations, corporations, or foundations.
- **Engagement -** Used for engagement of volunteer prospects, and to manage volunteer board & committee activity.

Other documentation is available to describe the plan types available for stewardship plans.

Plan Step Statuses

Planned/Pending – Steps that need to be completed in the future. While TED allows a user to select whether a step is Planned or Pending, in practice we only use Pending, so any Planned steps are automatically converted to Pending steps during a nightly process.

Completed – Once all components of a step have been finished, the step can be marked as **Completed.**

Cancelled – If a step is no longer necessary, the step can be cancelled.

Declined – If a donor or constituent opts out of participation in the step.

Plan Step Outlines

Step templates and plan templates can be applied to plans to quickly add structured, prebuilt steps. The following are available plan templates:

Plan | CFR Solicitation
Plan | LAG Template
Plan | Major Gift Template

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Step templates contain specific steps that can be added to plans. These templates usually contain fewer steps than plan templates. The following are available step templates:

Steps | ANR – Cycle 1 Attempts
Steps | ANR – Cycle 2 Attempts
Steps | Cultivation Meeting Secured
Steps | Email Meeting Request
Steps | Gift Planning
Steps | Introductions
Steps | Phone Meeting Request
Steps | QCD Information Request Response Plan
Steps | Qualification Meeting Secured
Steps | Real-time Review
Steps | Referrals
Steps | Solicitation Meeting Secured
Steps | Strategy Sessions
Steps | Urbana Push to Pending (P2P)

Contact Method Types

Campus Visit - A face-to-face visit that takes place on any of the University campuses. ***Counts in Enterprise Metric: Visits when gift officer is involved in the visit.***

Email - A personal email sent to or received by the constituent or household. Mass communications should not be tracked as Plan Steps or General Interactions.

Event - An event sponsored by any unit that the constituent or the household members attend.

General Information - Relevant and useful general information provided by the constituent or the household members.

High Profile Campus Visit - A visit to a university campus by a constituent that includes a meeting with high-level University personnel such as the Chancellor or President. ***Counts in Enterprise Metric: Visits when gift officer is involved in the visit.***

Internal Meeting - A meeting that takes place with parties internal to the University to advance the strategy for the prospect. Examples include strategy sessions; meeting with academic leadership, faculty members, and advancement staff to determine appropriate funding opportunity; and a preparation meeting with advancement leadership. Each participant in an internal meeting should be added as a step participant or secondary solicitor.

Mail - A postal mail piece that is sent to the constituent or household. This is NOT to be used to track mass communications.

Personal Visit - A personal face-to-face meeting that occurs with the constituent or household members. ***Counts in Enterprise Metric: Visits when gift officer is involved in the visit.***

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Phone - A phone call that occurs with the constituent or household members.

Social Media - A contact with the constituent or household members made through a social media account such as LinkedIn.

Task - An assignment or step that is to be completed to further the strategy. This contact method is often used to assist in tracking workflow items that are internally facing.

Text Message – A contact with the constituent or household members that occurs through a text message on a mobile device.

University Social Media Account Interaction - An instance where a constituent or household member responds to a social media contact from an official University social media account. These entries are to be entered only by approved social media managers.

University Survey Interaction - A response to a survey by a constituent or household member. These entries are to be entered only by approved survey managers.

University Website Interaction - A response or action taken by a constituent or household member through a unit or campus website. These entries are to be entered only by approved engagement managers.

Virtual Gathering – For situations in which a gift officer hosts a virtual meeting with multiple, unrelated prospects for a purpose that isn't necessarily strategic, but needs to be recorded.

Virtual Meeting – Substantive visits with prospects/donors that are conducted via a video format.

Website - An action taken by an advancement staff member to communicate with a constituent or household member through an external website.

Category Types

General Interactions - General Interactions should be used when documenting communication with the constituent that is important to note but not related to a plan or a gift. General Interactions do not move a gift or a relationship forward. This category should never be used on a prospect plan of any kind for any reason. General Interactions are added directly to the constituent's household record and display on the Documentation and Interactions tab under the Interactions sub-tab.

Plan Step - Any action that moves the relationship forward or is part of the fundraiser's strategy should be captured on the plan using the Plan Step category. Plan Steps are added to the constituent's household record via the associated plan. Plan Steps surface on both the Documentation and Interactions tab, under the Interactions sub-tab and on the fundraiser's Fundraiser page.

Subcategory Types

Attempted – Not Reached – Advancement staff is unable to reach the constituent; mostly used with phone, email or mail.

Gift Planning – The work done is specifically associated with Gift Planning.

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No Subcategory – No other subcategory fits.

Plan Strategy - Used on a completed step that clearly documents the role of each fundraiser in managing the donor relationship and the strategy for the desired outcome of the plan. Documenting the plan strategy is one way that fundraisers can demonstrate the rationale for participating as secondary solicitor on a plan.

Qualified | Leadership Annual Giving Prospect – Indicates prospect was qualified to have capacity, inclination, and readiness to give at the leadership annual giving level (<$25,000 over a five -year period). This subcategory will be entered on the interaction where the qualification process was completed.

Qualified | Major Gift Prospect – Indicates prospect was qualified to have capacity, inclination, and readiness to give at the major giving level in the next 24 months ($25,000+ over a five- year period). This subcategory will be entered on the interaction where the qualification process was completed.

Qualified | UIC Annual Giving – Indicates the prospect was qualified to have capacity, inclination, and readiness to give at an annual giving level. This subcategory will be entered on the interaction where the qualification process was completed.

Qualified, Not a Prospect | Not at this Level – The constituent has been qualified but may not be willing to donate at the corresponding opportunity or plan type level.

Qualified, Not a Prospect | Not at this Time – The constituent has been qualified but is not interested in donating at this time.

Qualified, Not a Prospect | Not for this Unit – A constituent who has expressed disinterest in supporting a particular advancement unit.

Qualified, Not a Prospect | Other – For disqualified prospects that do not fit into other QNP categories.

Qualified, Not a Prospect | Unresponsive – A constituent that fundraisers disqualify based on their unwillingness to engage.

Referral | UIC Annual Giving – Prospect identified by the UIC Annual Giving team and referred to a frontline fundraiser. This subcategory will be entered on a Qualification Plan by the advancement staff making the referral.

Referral | UIF Board and Donor Relations – Prospect referrals identified by UIF Board Directors and vetted by UIF Research and Portfolio Management (RPM) and UIF Board and Donor Relations. This subcategory will be used by RPM when creating and tracking referrals initiated by UIF Board and Donor Relations.

Referral | UIF Engagement Center – Prospect identified by the UIF Engagement Center and referred to a frontline fundraiser. This subcategory will be entered on a Qualification plan by UIF Research and Portfolio Management.

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Referral | UIF Gift Planning and Trust Services – Prospect identified by the UIF Gift Planning and Trust Services team as a potential estate gift prospect. This subcategory will be entered on a Qualification plan by UIF Research and Portfolio Management.

Referral | UIF Research and Portfolio Management Referral – Prospect with capacity vetted by UIF Research and Portfolio Management and referred to a frontline fundraiser. This subcategory will be entered on a Qualification Plan by a UIF researcher.

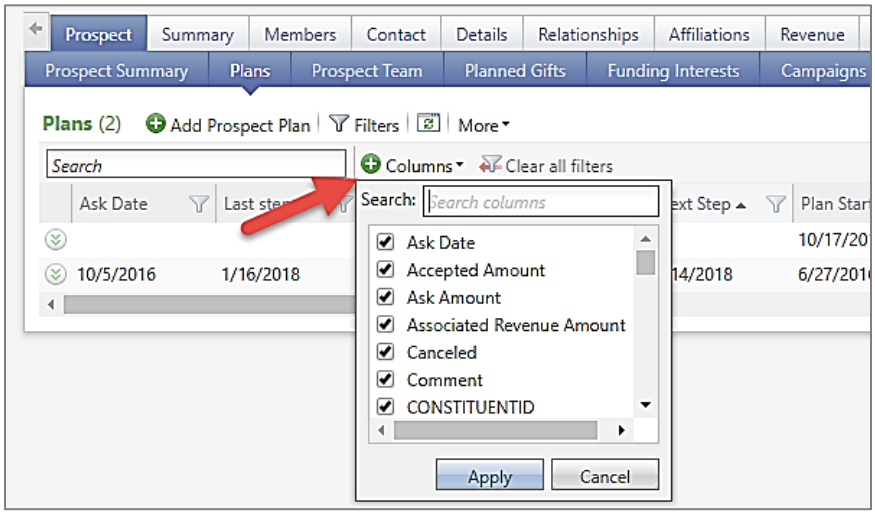
Referral | Frontline Advancement – Prospect identified by a frontline advancement staff person (major gift officer, alumni relations staff, annual giving officer, etc.) and referred to another frontline fundraiser. This subcategory will be entered on a Qualification Plan by the officer receiving or making the referral.

Research – If the work done in the step is specifically associated with Research.

Substantive Step - Used in the qualification, cultivation/solicitation, and stewardship plan stages. Substantive Steps are used to document any two-way externally facing communication that generates movement towards the desired outcome of the plan.

Plans Sub-tab Column Definitions

The Plans Tab contains a data list with information about each plan on that constituent's record. A user can customize this view by using the **Columns** menu to select the fields they wish to see.



Below are the available fields to customize the view:

Column Name	Definition	Display from
Ask Date	Displays the actual date the solicitation was made.	Opportunities tab on Plan
Accepted Amount	Displays the amount the donor has agreed to donate.	Opportunities tab on Plan
Ask Amount	Displays the amount the fundraiser asked for during the solicitation.	Opportunities tab on Plan

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Column Name	Definition	Display from
Associated Revenue Amount	Displays the total of any revenue that has been linked to the opportunity.	Opportunity Record
Canceled	Displays if the fundraiser has opted to cancel, or end, the opportunity.	Opportunities tab on Plan
Comment	Displays any additional information added directly to the opportunity.	Opportunities tab on Plan
CONSTITUENTID	Displays the TED Lookup ID for the household record associated with the plan.	Household Record associated with Plan
CONSTITUENTKEYNAME	Behind the scenes coding, do not use.	Data Warehouse
Date added	Displays the date the plan was created on the household record.	Plan Details
Designations	Displays the name of the fund or funds where the gift is applied.	Opportunities tab on Plan
Expected Ask Amount	Displays the amount the fundraiser expects to ask for from the donor.	Opportunities tab on Plan
Expected Ask Date	Displays the date the fundraiser expects to make the solicitation.	Opportunities tab on Plan
Expected Commitment Amount	Displays the amount the fundraiser believes the donor will give.	Opportunities tab on Plan
Expected Commitment Date	Displays the date the fundraiser expects to book the pledge, receive the first check, or receive a signed agreement for planned gifts.	Opportunities tab on Plan
ImageKey	Built-in functionality that does not align with our practices; do not use.	Out of the Box tool
ISACTIVE	Flag to display if the plan is an active or historical plan.	Out of the Box tool
Last step	Displays the actual date the last step was completed.	Details tab on Plan
Last Step Objective	Displays the complete objective or reason for the step as added by the development officer.	Details tab on Plan
Last Step Owner	Displays the name of the fundraiser that completed the step.	Details tab on Plan

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Column Name	Definition	Display from
Likelihood Type	Displays the percentage assigned by the fundraiser as to how likely they think it the donor will document or give the expected commitment amount by the expected commitment date.	Opportunities tab on Plan
Lookup ID	Displays the Lookup ID associated with the Household record where the plan was created.	Household Record associated with Plan
Multi Unit Interest	Displays a yes or no depending on if the constituent has affiliations with more than one unit. If either constituent is flagged as a multi-unit this will be populated.	Affiliation tab
Multi University Interest	Displays a yes or no depending on if the constituent has affiliations with more than one campus. If either constituent is flagged as a multi-unit this will be populated.	Affiliation tab
Next Step	Displays the expected date of the closest planned or pending step on the plan.	Details tab on Plan
Opportunity Type	Displays the opportunity type assigned to the solicitation by the fundraiser.	Opportunities tab on Plan
Plan Name	Displays the name of the plan as a blue link to enable the user to jump directly to the plan record.	Plan Details
Plan Stage	Displays the stage of the plan based on the stage assigned to the most recent step on the plan.	Plan Details
Plan Start Date	Displays the date the plan was started.	Plan Details
Plan Type	Displays the type of plan assigned by the fundraiser when the plan was created. The plan type and plan name should always match.	Plan Details
Primary Plan Manager	Displays the name of the advancement staff that has been assigned as the primary plan manager.	Plan Details
Prospect	Displays the name of the record associated with the plan.	Plan Details
Prospect Manager	Displays the name of the advancement staff that has been assigned as the prospect manager if one has been assigned to the household.	Plan Details

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Column Name	Definition	Display from
Prospect Priority	Currently not being used.	Data Warehouse
Prospect Status	Displays the prospect's capacity based on gift capacity ratings. See the Prospect Status Calculation document for additional details.	Prospect Summary tab
Qualified	Displays the amount of an Opportunity on the plan if the Opportunity status is Qualified.	Opportunities tab on Plan
Qualified (non-monetary) **DO NOT USE**	Currently not being used.	
Range	Displays the gift range of the Opportunity. This is a calculated field based on the Opportunity amount.	Out of the Box tool
Region:MSA	Displays the US and International Metro regions from the primary member of the household's individual record.	Primary Member of the Household's Individual Record or Organization record If blank there is no associated region code on the record
Rejected	Displays if the constituent has opted to end the Opportunity by outright rejection of the solicitation.	Opportunities tab on Plan
Response Date	Displays the date the constituent responded to the solicitation.	Opportunities tab on Plan
Response Pending	Displays as the Opportunity status until the constituent accepts or rejects the solicitation.	Opportunities tab on Plan
Sites	Displays the site number and name associated with the plan.	Plan Details
STATUSCODE	An alphabetical code used in sorting prospect status; do not use.	Data Warehouse

UPDATED 4/24/2025

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DOCUMENTING SECONDARY OWNERSHIP ON PROSPECT PLANS

GUIDANCE FOR DOCUMENTING SECONDARY OWNERSHIP

Possible criteria for secondary ownership *(at least 1 should be satisfied)*	**Details for documenting as a completed plan step on the prospect plan in TED**
Engage directly with the prospect to advance the plan strategy	• **Owner:** the fundraiser leading the interaction should be listed as owner. Any other fundraisers involved in the communication should be included in the additional solicitor's section. • **Contact Method:** should be an externally facing modality, including: ○ Email; Phone; Text Message; Social Media; Mail; Personal Visit; High Profile Campus Visit; or Virtual Meeting • **Subcategory:** should be a subcategory that qualifies as substantive movement in Portfolio Engagement, including: ○ Qualified | Major Gift Prospect; or Qualified | Leadership Annual Giving Prospect; ○ Substantive Step; ○ Qualified, Not a Prospect | Not at this time; ○ Qualified, Not a Prospect | Not at this level; ○ Qualified, Not a Prospect | Not for this unit; or ○ Qualified, Not a Prospect | Other • **Comment:** should clearly communicate actions, role of fundraiser(s) involved
Are substantially involved in the development of the prospect strategy	• **Owner:** the fundraiser leading the interaction should be listed as owner. Any other fundraisers involved in the communication should be included in the additional solicitor's section. • **Contact Method:** NEW: Plan strategy • **Subcategory:** No subcategory • **Comment:** should clearly document role played by the fundraiser and outline the strategy for managing the donor relationship and desired outcome of the plan (e.g., what is the approach to cultivation, etc.)
Are instrumental in developing information, opportunities, documentation, or access that helped drive the plan strategy	• **Owner:** the fundraiser leading the interaction should be listed as owner. Any other fundraisers involved in the communication should be included in the additional solicitor's section. • **Contact Method:** should include internally facing interaction or task, such as: ○ Internal meeting; General Information; or Task

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	• **Comment:** should clearly document/articulate the information, opportunities, documentation, or access that was developed to help drive the plan strategy.
Participate in the creation of a proposal, solicitation, or successful closure of a gift (external)	***Use this approach for externally/prospect facing actions:*** • **Owner:** the fundraiser leading the interaction should be listed as owner. Any other fundraisers involved in the communication should be included in the additional solicitor's section. • **Contact Method:** should be an externally facing modality, including: o Email; Phone; Text Message; Social Media; Mail; Personal Visit; High Profile Campus Visit; or Virtual Meeting • **Subcategory:** should be a subcategory that qualifies as substantive movement in Portfolio Engagement, including: o Qualified | Major Gift Prospect; or Qualified | Leadership Annual Giving Prospect; o Substantive Step; o Qualified, Not a Prospect | Not at this time; o Qualified, Not a Prospect | Not at this level; o Qualified, Not a Prospect | Not for this unit; or o Qualified, Not a Prospect | Other • **Comment:** should clearly communicate actions, role of fundraiser(s) involved
Participate in the creation of a proposal, solicitation, or successful closure of a gift (internal)	***Use this approach for internally/colleague facing actions:*** • **Owner:** the fundraiser leading the interaction should be listed as owner. Any other fundraisers involved in the communication should be included in the additional solicitor's section. • **Contact Method:** should include internally facing interaction or task, such as: o Internal meeting; General Information; or Task • **Comment:** should clearly document/articulate how the secondary solicitor contributed to the creation of a proposal
Hold in-depth discussions with the major gift officer on gift planning and tax considerations, in the case of gift planning officers	• **Owner:** the gift planner leading the interaction should be listed as owner. Any other fundraisers involved should be included in the additional solicitor's section. • **Contact Method:** should reflect an internally facing interaction: o Internal Meeting • **Subcategory:** should be the subcategory used to track gift planning consults o Gift Planning • **Comment:** should clearly communicate what transpired during/resulted from the meeting

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PROSPECT STATUS

UNDERSTANDING CAPACITY RATINGS

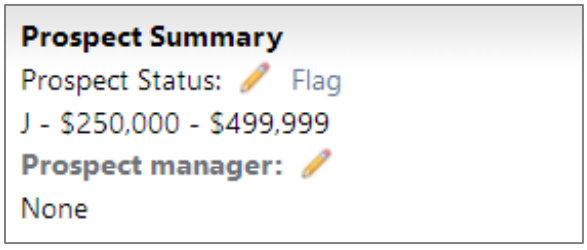
Overview

The Prospect Status on a constituent or household record indicates the household's **total philanthropic giving capacity to all institutions over five years**. The Prospect Status displayed in the "Prospect Summary" tile on a TED record is based on capacity ratings that are assigned using various applicable estimation methods, each with different confidence levels. Capacity ratings with higher confidence levels are considered more accurate. The Prospect Status will always reflect the capacity estimation with the highest confidence that has been calculated for that constituent.

Please note that Prospect Status is a separate measure from likelihood. Having a certain Prospect Status does not guarantee or imply that the donor will be interested in making a gift at that level (or even at all) to the University of Illinois.

Prospect Summary Tile

Prospect Status is displayed in the Prospect Summary tile shown on a constituent or household record.



Prospect Status Calculation

UIF Research and Portfolio Management (RPM) uses six different methods to estimate giving capacity. Our goal is to move prospects to the highest confidence level method available while strategically allocating our resources. The most common methods that fundraisers encounter are Wealth Estimate, Estimated Giving Capacity (EGC), and Ultimate Giving Capacity (UGC). You can think of the different methods like zooming in on an image: more details emerge and give us a better picture of the subject.

The capacity rating that populates the Prospect Status area is determined by an automated process that examines and prioritizes all the active gift capacity ratings for both members of a household. This automated process gives priority to the capacity rating method with highest confidence level. If there are multiple active capacity ratings using the highest priority capacity rating method, then the one with the most recent start date will become the Prospect Status for the household record (and the household members' constituent records).

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Capacity Rating Methods (in order by confidence/priority level)

Wealth by Proxy	When public wealth information is unavailable, Wealth by Proxy attempts to estimate a prospect's five-year giving capacity by using ZIP codes and other data. This data may be used in isolation, or it may be used to examine other individuals for whom we do know more conclusive information and from there, assume and apply similar characteristics to the unknown group. This is the lowest confidence method (fewest details about wealth are known).
Bulk Screening	Bulk Screening is used to process large amounts of TED records through non-primary wealth-information vendors, and results in estimation of a prospect's five-year giving capacity. A minimum level of confidence is assumed before the data is loaded into TED, but individual transactions are not verified through primary sources or examined in detail. This method has medium confidence.
Windfall Gift Capacity	Based on screening from vendor source and verified by RPM.
Wealth Estimate	A Wealth Estimate obtains preliminary estimates for five-year giving capacity calculated by RPM's primary wealth-information provider (WealthPoint). This process uses a set formula based on confirmed real estate assets and a multiplier for life stage. This method has high confidence, since it uses verified data from a single source.
International Prospect	We generally do not have access to public wealth data for international prospects, so we may estimate an international prospect's five-year giving capacity using only qualifiable data such as job title or perceived (but not verified) wealth. Like Wealth by Proxy, this perception of wealth and its resulting capacity rating may be derived from comparison to other individuals for whom more information is known. This method has relatively low confidence (few details are known, and those data may not be quantifiable).
Estimated Giving Capacity (EGC)	Estimated Giving Capacity uses industry standards and best practices and is RPM's best estimate of the prospect's total capacity to make philanthropic gifts over a five-year period. EGCs are calculated by the RPM team after verifying public assets, which may include real estate, stock holdings, philanthropic giving, salary, and other data points, through primary sources. This method has very high confidence, as it relies on verified data from primary sources.
Ultimate Gift Capacity (UGC)	EGCs can be thought of as the "research" rating, and UGCs can be thought of as the "fundraiser" rating of a prospect's capacity to make philanthropic gifts over a five-year period. Fundraisers may have access to information that RPM does not, such as non-public information divulged during the donor engagement process, and intuition based on their professional judgement and experience in the field. If a fundraiser suspects (or in some cases, definitively knows) that the prospect's giving capacity is different than their EGC, an Ultimate Gift Capacity should be entered to update the Prospect Status accordingly. This method has the highest confidence level, since it uses non-public data available from fundraisers who are in direct contact with prospects.

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Notes for Fundraisers

The high-level overview is as follows:

- Wealth Estimate is used for unqualified prospects, and you can ask for one by filing a research request for **R2: Wealth Estimate**.
- Capacity Verification (EGC) is used for qualified prospects, and you can ask for one by filing a research request for **R4: Capacity Verification**.
- Ultimate Giving Capacity (UGC) allows fundraisers to use their knowledge and judgment to ask for a rating that overrides RPM's EGC.
- RPM keeps track of the rest.

UPDATED 6/13/24

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QUALIFIED, NOT A PROSPECT

UNDERSTANDING QNP CODES

Overview

Qualified, Not a Prospect (QNP) is a code used to flag constituents that are not donor prospects at the present time. QNP codes are applied when a prospect is unresponsive, not ready, or lacks inclination or capacity to donate at a particular gift level or unit.

Adding the QNP code to applicable constituent records helps both fundraisers and the UIF Research and Portfolio Management (RPM) team better identify prospects who are not likely to give a major gift, while also preventing those prospects from being unengaged for long periods. Households tagged with QNP codes are typically excluded from reporting (e.g., prospect management, campaign pyramids, pipelines), leading to more efficient prospecting operations.

There are five classifications of QNP, and it is possible for a constituent to have multiple QNP classifications on their record.

- **Qualified, Not a Prospect | Not at this level**
- **Qualified, Not a Prospect | Not at this time**
- **Qualified, Not a Prospect | Not for this Unit**
- **Qualified, Not a Prospect | Other**
- **Qualified, Not a Prospect | Unresponsive**

Accurate QNP status helps prevent duplication of efforts, particularly when multiple fundraisers are attempting to requalify a particular household. It is important to document all QNP cases for a constituent so that appropriate actions can be taken.

Access

Users who can update prospect plans in TED can add QNP codes to plan steps using the Interaction Subcategory field. QNP classifications should be entered by fundraisers or Advancement Leadership since they are the best equipped individuals to determine when a prospect is disqualified.

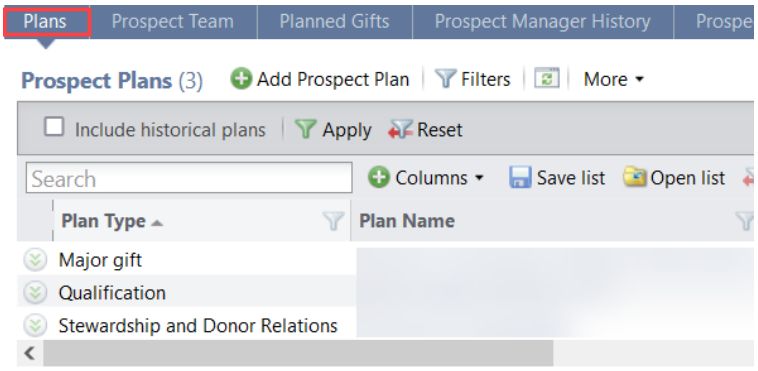
Adding Qualified, Not a Prospect

To add QNP code, open a plan step and choose an appropriate value for the Interaction Subcategory field.

1. Locate the prospect for which you want to add a Qualified, Not a Prospect code.

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2. Once the plan has been selected, edit the appropriate step:
    - Set the step status to Completed.
    - Enter a value for the Actual date field.
    - Choose the appropriate QNP classification from the Interaction Subcategory drop down.
    - In the body of the plan step, enter specific details stating why the specific QNP classification was chosen. **It is also recommended to add a note into the plan narrative stating why constituents are being marked as QNP**. This helps the UIF Research and Portfolio Management (RPM) team determine when to re-refer the prospect in the future. RPM representatives review all entered interactions, and comments related to QNP codes are incredibly helpful.
3. Save the Plan step.
4. **Once a QNP code is added to a plan, the plan should be made historical**. If appropriate, such as a "QNP, Not at this Time," a gift officer may notify their Prospect Development Analyst to return the prospect to the referral pool with a pending outreach step of 1-2 years so that the prospect will resurface at the correct time. Gift officers are also encouraged to notify their colleagues if a prospect is inclined to give to a unit other than their own.

There is an active business project ticket to update the QNP procedures as of February 2025. The language of Qualified, Not a Prospect is likely to change in TED to "Disqualified" in the future and the types of Disqualifications are estimated to change as follows:

Disqualified | Unresponsive
Disqualified | Lacks Readiness
Disqualified | Multiple Reasons
Disqualified | Lacks Inclination
Disqualified | Lacks Capacity
Disqualified | Permanent

This document will be updated once those changes have been made.

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THE PROSPECT MANAGEMENT TEAM

WHO WORKS ON PROSPECT PLANS?

Prospect plans document our strategy with each donor prospect through the philanthropic cycle of qualification, cultivation, solicitation, and stewardship. Prospect plans are essential in our efforts to embrace communication, collaboration, and transparency. The Prospect Management team is composed of individual or organization participating in the prospect plan.

Understanding the available roles for both advancement staff and plan participants is important to ensure that information recorded on the plan is accurate.

Prospect Management Roles

Primary Plan Manager is the advancement staff member responsible for directing the plan strategy for a prospect, documenting, and updating the plan strategy in TED, and serving as the key point of contact externally with the prospect and internally with staff regarding implementation of this plan. A Primary Plan Manager is required for each prospect plan in TED.

When the primary plan manager assigns another officer as secondary solicitor, the primary plan manager becomes responsible for convening at least one strategy session per year with all plan participants. S/he will also take the lead on assigning specific tasks necessary to carry out the plan strategy.

The primary plan manager serves in this capacity as long as s/he remains in the current role. If there is a role change, their future participation (continuing as primary, if their involvement is crucial to closing a gift, or remaining as an active participant but in a secondary role) will be determined by their current and former managers.

Prospect Manager is responsible for the coordination of the overall strategy on high-value prospects, and for the coordination of multiple active plans on a single prospect. A prospect manager is required and assigned only when at least one the following criteria is true:

1. The prospect has a Principal Gifts constituency (Principal Gifts Prospect, PG Prospect Credit Relation).
2. The prospect has a University Trustee constituency (Current U of I Trustee, Former U of I Trustee).
3. The prospect has a UIF Board Director constituency.
4. The prospect has plans managed by more than one advancement officer from different units.

Plan Managers and **Prospect Managers** may or may not be the same person, depending on the needs of each plan and each prospect.

Secondary Solicitor is an advancement staff member actively involved in the cultivation, solicitation, or stewardship of a prospect. If a fundraiser is a Secondary Solicitor on a plan, that plan will be counted when calculating the fundraiser's metrics.

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A gift officer can be assigned as secondary solicitor on a major gift plan when their participation is documented as contributing in one of the following ways:

- Engage directly with the prospect to advance the plan strategy, and/or
- Are substantially involved in the development of the prospect strategy, and/or
- Are instrumental in developing information, opportunities, documentation, or access that helped drive the plan strategy, and/or
- Participate in the creation of a proposal, solicitation, or successful closure of a gift, and/or
- Hold in-depth discussions with the major gift officer on gift planning and tax considerations, in the case of gift planning officers.

Before a secondary solicitor assignment is added, the primary plan manager and anticipated secondary solicitor should have a conversation about the secondary solicitor's involvement and how it will materially advance the plan strategy.

A gift officer can also be added as a secondary solicitor when they previously served as primary plan manager, but due to a role change are being replaced as primary by another officer. To be added as secondary solicitor, the gift officer must maintain active involvement with the plan and/or opportunity. Both gift officers' managers must approve the secondary solicitor in this scenario.

All Secondary Solicitors must be given a role on the plan from one of the following:

Academic Administration – University President, Chancellors, Provosts, and Deans.

Alumni Relations Officer – Alumni relations staff members who are heavily involved in developing or executing the strategy for the prospect.

Corporate Fundraiser – Gift officers or Corporate and Foundation Relations officers who manage long-term strategic relationships with organizations, corporations or foundations.

Gift Planning Officer – Gift planning staff members who are involved in developing or executing the strategy for a planned gift.

Marketing / Communications Officer – Marketing or communications staff members who are heavily involved in developing or executing the strategy for the prospect.

Frontline Fundraiser – Gift officers who are assisting the Plan Manager by engaging directly with the prospect; are substantially involved in the development of the plan strategy; are instrumental in developing information, documentation, or access to drive the plan strategy; or participate in the creation of a proposal, solicitation, or successful closure of a gift.

Stewardship & Donor Relations Officer – Stewardship and donor relations staff members who are involved in developing or executing the stewardship strategy.

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Plan Participants are anyone other non-advancement staff involved with the plan. Plan participants include people both internal and external to the University of Illinois. When soliciting a gift from an individual, the prospect plan is added to their household record, but the household members are also added to the plan as plan participants with a role of Household Member. Plan participants may also include legal counsel involved in the gift agreement, advisers, and related organizations. All plan participants must have a role when entered on the plan. Any of the following roles can be selected for the plan participant.

Attorney – A legal attorney or other legal advisor.

Decision Maker – An additional decision maker in the agreement to accept the ask. This role is not the same as Household Member. The decision maker is in addition to the household member or the Organization member.

Faculty Member – A campus faculty member involved in assisting with the plan.

Financial Planner – The potential donor's financial advisor.

Foundation Family Member – A member of the family foundation.

Household Member – The potential donor that will accept or reject the ask. This role is automatically assigned to any household member in an automated process that runs Monday through Friday. This process will also update any members of the household who have been assigned a different role to the role of Household Member. Though this role is automatically assigned, it is still available in the drop-down menu for functional purposes.

Organizational Member – The potential organization donor who will accept or reject the ask. This role is required on all prospect plans for organizations. There may be multiple organization members involved in one plan.

Other Influencer – Any other person who is involved in the aid of getting the potential donor to agree to the ask.

Relative – A relative of the potential donor who is not considered a decision maker.

Requesting a Prospect Manager be Assigned to a Household Record

When it is necessary to request a prospect manager because multiple active plans have been added to a household record, the request can be made via a Research Request.

When making the request:

1. Use a Research Request with a Research Type of Other.
2. Include the following information in the Notes field:
    a. Name of the household record where the prospect manager will be added.
    b. Constituent ID of the household record.
    c. The name of the desired Prospect Manager.

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UIF Research and Portfolio Management will examine the request and follow procedures to secure and document the prospect manager assignment.

Editing Solicitors and Participants

Secondary Solicitors and Plan Participants can be added to a plan or end-dated in the Solicitors and Participants tab of the plan record.

Adding and Editing Secondary Solicitors

To Add a Secondary Solicitor



1. Begin on the **Solicitors and Participants** tab on the prospect plan record.
2. Click the **Add** button in the **Secondary Solicitors** section.



1. Use the **Solicitor** field to search for the appropriate advancement staff member**.** Searching can be done by typing directly into the field or by using the magnifying glass to open a new search window.
2. Select the appropriate **Role**.
3. Add the **Start date** for the new team member.

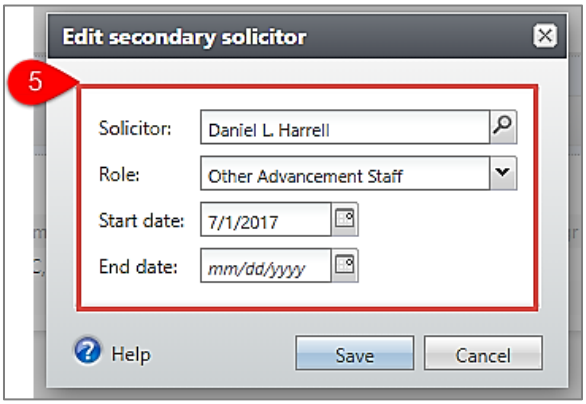
To Edit a Secondary Solicitor



1. Begin on the **Solicitors and Participants** tab on the plan.
2. Navigate to the **Secondary Solicitors** section of the tab.
3. Click the **double chevrons** to the left of the solicitor's name to expand the action menu.
4. Click the **Edit** button.

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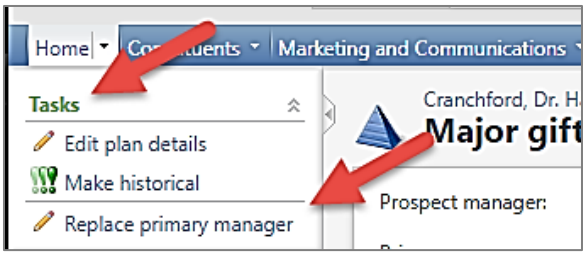
5. Edit any necessary details:
    a. The name of the **Solicitor** should only be edited if an incorrect solicitor was selected in the first place.
    b. The team member's **role** can change as necessary.
    c. The **Start date** indicates when the advancement staff member began working on the prospect plan.
    d. Add an **End date** if the team member is longer on the prospect team.



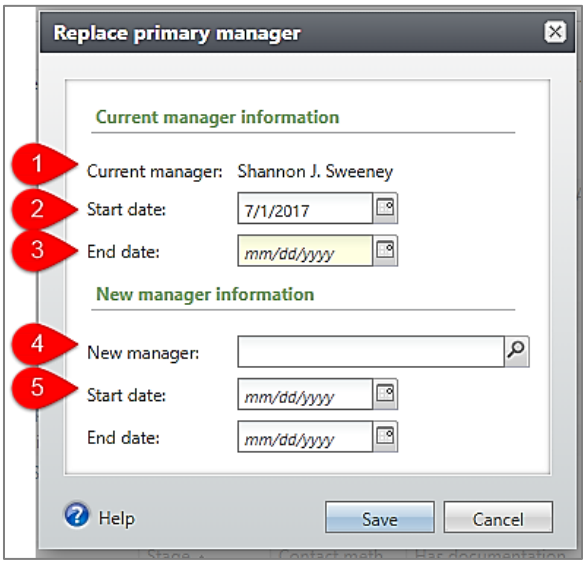
Editing the Primary Manager

Begin on the prospect plan.

1. Editing is done from the **Tasks** menu in the left sidebar.
2. Click the **Replace primary manager** action.



1. The **Current manager** identifies the name of the manager who is leaving the prospect plan.
2. The **Start date** field indicates the current manager's start date.
3. The **End date** field is updated with the end date for the manager leaving the prospect plan. This is a required field.
4. Search for and select the **New manager**. Searching can be done by typing directly into the field or by using the magnifying glass to open a new search window.
5. When the end date is added to the Current manager information, the **Start date** field will auto-populate with the next day.



Do not add an end date to the new primary manager. If all managers are leaving the plan, the prospect plan should be made historical.

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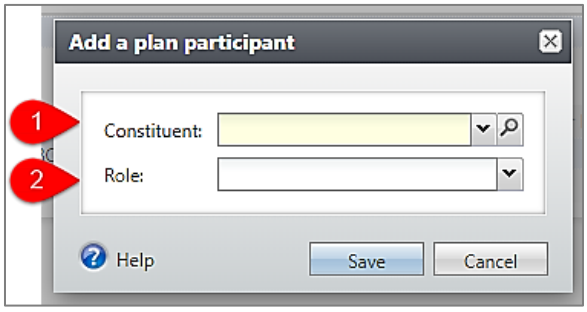
Adding and Editing Plan Participants

Add Additional Plan Participants

1. Begin on the **Solicitors and Participants** tab on the prospect plan.
2. Navigate to the **Plan Participants** field.
3. Click the **Add** button.

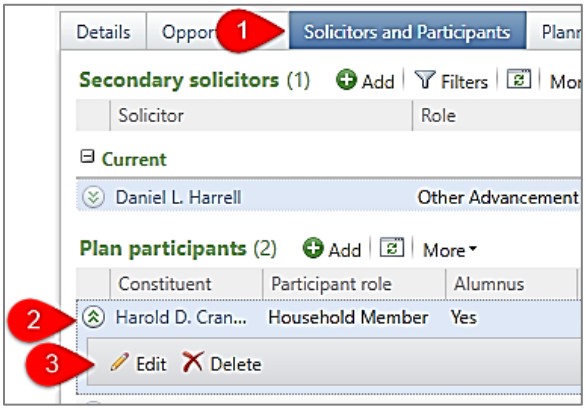


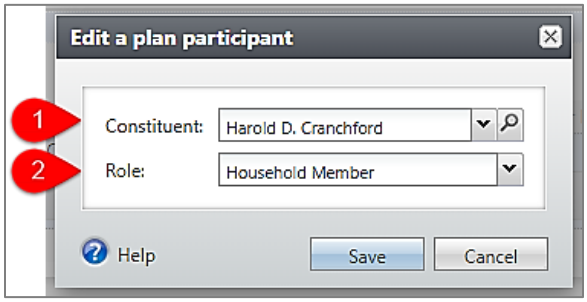
1. Use the **Constituent** field to search for the appropriate constituent or select the constituent from the drop-down menu.
2. Add the **Constituent's** role.



Edit a Plan Participant

1. Begin on the **Solicitors and Participants** tab on the prospect plan record.
2. Click the **double chevron** to the left of the plan participant's name to expand the action menu.
3. Click the **Edit** button.





1. The **Constituent** name should only be edited if an incorrect participant was selected in the first place.
2. Update the **participant's role** as needed. The automated process that adds members of the household to the plan will also automatically update any member of the household already assigned to the plan with the Household member role.

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PROSPECT PLAN TYPES IN TED

A GUIDELINE FOR USING PROSPECT PLANS

The proper use of prospect plans in TED is fundamental to our advancement efforts. Prospect plans document our strategy with each donor prospect through the philanthropic cycle of qualification, cultivation, solicitation, and stewardship. Prospect plans are essential in our efforts to embrace communication, collaboration, and transparency. There are eight different types of prospect plans:

- **Qualification**
- **Major Gift**
- **Principal Gift**
- **Leadership Annual Gift**
- **Engagement**
- **Corporate & Foundation Relations (CFR) Solicitation**
- **Corporate & Foundation Relations (CFR) Engagement**
- **Campaign Ask Expectancy**

Fundraisers should select the appropriate plan type for the nature and phase of their gift discussion with the prospect.

This document focuses on prospect plans, which are the fundamental structure that gift officers use to document their work. Other documentation is available for stewardship plans, which are used by advancement staff who manage large-scale, repeatable stewardship activities (typically related to stewardship of funds).

Qualification Plans

Qualification Plans are used when determining if prospects have the capacity and interest to make a gift. Qualification plans should document the process (or attempt) to confirm a prospect's major gift capacity and affinity to the institution. Please note that UIC does not use qualification plans; qualification is tracked as a step at UIC.

Once an advancement officer has successfully qualified the prospect and documented that work as plan steps, the plan type can be changed to Major Gift and the work continued. If the prospect is not a major gift prospect, the advancement officer will add a plan step to record the disqualification. This plan step should include an appropriate subcategory of "Qualified Not a Prospect" (QNP) and specific comments about the disqualification. Once the QNP step has been added, the plan should be made historical.

The UIF Research and Portfolio Management Team (RPM) creates qualification plans when making referrals. For questions regarding the referral process, please contact your UIF RPM liaison.

Major Gift Plans

Major Gift plans are documented strategies to cultivate and solicit major gifts ($25,000 - $4.99M) from qualified prospects within the guidelines established by the advancement program policies.

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Major Gift plans are expected to document all meaningful interactions that work toward the plan objective. Many of these interactions will involve the donor, but important internal work, such as internal meetings, should also be documented. Once a plan opportunity is created, all required fields should be filled in and kept current.

When a plan's objective has been reached, and no further work is needed to cultivate, solicit, or steward the donor for that particular gift, the plan should be made historical. (Additional and ongoing stewardship may be expected if the donor establishes or donates to a fund, but such work is best handled through the recurring activities managed through stewardship plans.)

Principal Gift Plans

Principal Gift plans are documented strategies to cultivate and solicit principal gifts ($5M+ in Urbana, $1M+ in Chicago) from qualified prospects within the guidelines established by the advancement program policies. **This plan type is based on anticipated gift size, not the donor's capacity.** A donor with the capacity to make a principal gift, and who is a member of the Principal Gifts Prospect or a related constituency, may only be interested in making a Major Gift. In such cases, the plan type should be set to Major Gift.

Principal Gift plans are expected to document all meaningful and substantive interactions that work toward the plan objective. Many of these interactions will involve the donor, but important internal work, such as internal meetings, should also be documented. Once a plan opportunity is created, all required fields should be filled in and kept current.

When a plan's objective has been reached, and no further work is needed to cultivate, solicit, or steward the donor for that particular gift, the plan should be made historical. (Additional and ongoing stewardship may be expected if the donor establishes or donates to a fund, but such work is best handled through the recurring activities managed through stewardship plans.)

Leadership Annual Gift Plans

Leadership Annual Gift plans are documented strategies to cultivate and solicit leadership annual gifts ($1,000 - $24,999) from qualified prospects within the guidelines established by the advancement program policies. There may be a few steps on this plan, but an opportunity and plan steps should be documented. The Leadership Annual Giving plan should be marked historical once the gift or commitment is received. A new plan for each year is anticipated.

Engagement Plans

Engagement Plans are used to track activities and strategies involving volunteers, and board and committee activity. There are no opportunities on these plans.

Corporate and Foundation Relations (CFR) Solicitation Plans

CFR Solicitation Plans are documented strategies used by development officers working with corporations, foundations, or other organizations with the intention of soliciting a gift of at least $1,000.

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CFR Solicitation plans are expected to document all meaningful and substantive interactions that work toward the plan objective. Many of these interactions will involve the donor, but important internal work, such as internal meetings, should also be documented. Once a plan opportunity is created, all required fields should be filled in and kept current. **CFR plans should be entered on the primary record of a corporate hierarchy**. If the fundraiser is working with a subsidiary or branch office, that record should be added to the plan as a plan participant.

Corporate and Foundation Relations (CFR) Engagement Plans

CFR Engagement Plans are documented strategies used by development officers working with corporations, foundations, or organizations, when there is not an expected solicitation within the next two years. These plans do not have opportunities; rather these plans detail strategic work needed to initiate or increase engagement with a foundation, organization, or corporation. If the relationship has moved forward such that a gift solicitation is likely in the next 24 months, the fundraiser should change the plan type to CFR Solicitation.

Campaign Ask Expectancy (CAE) Plans

Campaign Ask Expectancy plans were used during the With Illinois campaign for internal tracking purposes only. The opportunities shown on these plans display the remainder of the total amount expected from the prospect during the campaign minus the campaign's gifts received and/or current open opportunities on the prospect's record.

Actual proposals and associated strategic steps **should not** be entered into these plans.

Work with your designated UIF Research and Portfolio Management representative if you have questions about CAE plans.

UPDATED 2/18/2025

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DEFAULT DESIGNATIONS

FUND NUMBERS TO USE WHEN YOU ARE NOT YET SURE WHERE THE GIFT WILL GO

When an **opportunity** is created in a prospect plan, it is recommended that the fundraiser enter the proper designation number (AKA fund number) that the gift will benefit. Sometimes a fund has not been established at the time of the ask, and therefore a designation number does not exist. In these situations, the opportunity should reflect a "To Be Determined by Donor" designation. Below is a list, sorted alphabetically within each university, to help guide you in choosing the proper "To Be Determined by Donor" designation on the opportunity.

List of "To Be Determined by Donor" Designations

University	Designation ID	Designation Public name
UIC	12000002	UIC Chicago Designation to be Determined by the Donor
UIC	123333JV	UIC Academic Computing and Communication Center Designation to be Determined by the Donor
UIC	123333GF	UIC Applied Health Sciences Designation to be Determined by the Donor
UIC	123333FR	UIC Architecture, Design & the Arts Designation to be Determined by the Donor
UIC	123333GG	UIC Armed Forces Designation to be Determined by the Donor
UIC	123333FL	UIC Business Administration Designation to be Determined by the Donor
UIC	123333JG	UIC Campus General Administration Designation to be Determined by the Donor
UIC	123333GN	UIC Continuing Studies Designation to be Determined by the Donor
UIC	123333FN	UIC Dentistry Designation to be Determined by the Donor
UIC	123333FP	UIC Education Designation to be Determined by the Donor
UIC	123FQ284	UIC Engineering Building Designation to be Determined by the Donor
UIC	123333FQ	UIC Engineering Designation to be Determined by the Donor
UIC	123333FS	UIC Graduate College Designation to be Determined by the Donor
UIC	123333JD	UIC Healthcare System - MSHC Designation to be Determined by the Donor
UIC	123333FK	UIC Health and Physical Education Designation to be Determined by the Donor
UIC	123333GH	UIC Healthcare Systems - MC Designation to be Determined by the Donor
UIC	123333GT	UIC Honors College Designation to be Determined by the Donor
UIC	123333JT	UIC Intercollegiate Athletics Designation to be Determined by the Donor
UIC	123333FJ	UIC John Marshall Law School Designation to be Determined by the Donor
UIC	123333FT	UIC Liberal Arts and Sciences Designation to be Determined by the Donor
UIC	123333GQ	UIC Library Designation to be Determined by the Donor
UIC	123333FZ	UIC Medicine at Chicago Basic Medical Sciences Designation to be Determined by the Donor
UIC	123333GA	UIC Medicine at Chicago Clinical Sciences Designation to be Determined by the Donor
UIC	123333GC	UIC Medicine at Peoria Designation to be Determined by the Donor
UIC	123333GE	UIC Medicine at Rockford Designation to be Determined by the Donor
UIC	123333FV	UIC Medicine Office of the Dean Designation to be Determined by the Donor
UIC	123333FW	UIC Nursing Designation to be Determined by the Donor
UIC	123333JA	UIC Office of the Chancellor Designation to be Determined by the Donor

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UIC	123333FX	UIC Pharmacy Designation to be Determined by the Donor
UIC	123333JB	UIC Provost and VC Academic Affairs Designation to be Determined by the Donor
UIC	123333JU	UIC Public and Government Affairs Designation to be Determined by the Donor
UIC	123333FY	UIC Public Health Designation to be Determined by the Donor
UIC	123333GL	UIC Social Work Designation to be Determined by the Donor
UIC	123333JK	UIC Student Affairs Ancillary Services Designation to be Determined by the Donor
UIC	123333GP	UIC Urban Planning and Public Affairs Designation to be Determined by the Donor
UIC	123333JS	UIC Vice Chancellor for Development Designation to be Determined by the Donor
UIC	123333JW	UIC Vice Chancellor for Health Affairs Designation to be Determined by the Donor
UIC	123333JF	UIC Vice Chancellor for Research Designation to be Determined by the Donor
UIC	123333JJ	UIC Vice Chancellor for Student Affairs Designation to be Determined by the Donor
UIF	193AM813	UIF Designation to be Determined by the Donor
UIS	14000004	UIS Springfield Campus Designation to be Determined by the Donor
UIS	143333PE	UIS Business and Management Designation to be Determined by the Donor
UIS	143333PL	UIS Center for State Policy Designation to be Determined by the Donor
UIS	143333SA	UIS Chancellor Designation to be Determined by the Donor
UIS	143333PG	UIS Education and Human Services Designation to be Determined by the Donor
UIS	143333PH	UIS Liberal Arts and Sciences Designation to be Determined by the Donor
UIS	143333PK	UIS Library Designation to be Determined by the Donor
UIS	143333SD	UIS Other Administrative Units Designation to be Determined by the Donor
UIS	143333SB	UIS Provost and VC Academic Affairs Designation to be Determined by the Donor
UIS	143333PF	UIS Public Affairs and Administration Designation to be Determined by the Donor
UIS	143333SE	UIS Student Affairs Designation to be Determined by the Donor
UIUC	11000001	Urbana Designation to be Determined by the Donor
UIUC	113333KL	ACES Designation to be Determined by the Donor
UIUC	113NA550	Allerton Designation to be Determined by the Donor
UIUC	113333KY	Applied Health Sciences Designation to be Determined by the Donor
UIUC	113333KM	Business Designation to be Determined by the Donor
UIUC	113333LT	Carle Illinois Designation to be Determined by the Donor
UIUC	113333NA	Chancellor Designation to be Determined by the Donor
UIUC	113333KN	Education Designation to be Determined by the Donor
UIUC	113333KP	Engineering Designation to be Determined by the Donor
UIUC	113333KR	Fine and Applied Arts Designation to be Determined by the Donor
UIUC	113333KW	General Studies Designation to be Determined by the Donor
UIUC	113333KS	Graduate College Designation to be Determined by the Donor
UIUC	113333LP	Information Sciences Designation to be Determined by the Donor
UIUC	113333LQ	International Programs and Studies Designation to be Determined by the Donor
UIUC	113KR607	KAM Designation to be Determined by the Donor
UIUC	113333LG	Labor and Employment Relations Designation to be Determined by the Donor
UIUC	113333KU	Law Designation to be Determined by the Donor
UIUC	113333KV	Liberal Arts and Sciences Designation to be Determined by the Donor
UIUC	113333LR	Library Designation to be Determined by the Donor
UIUC	113333KT	Media Designation to be Determined by the Donor

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UIUC	113333LB	Medicine at Urbana Designation to be Determined by the Donor
UIUC	113NE370	OVCIR Admin Designation to the Determined by the Donor
UIUC	113333LM	Provost and Academic Programs Designation to be Determined by the Donor
UIUC	113333NB	Provost and VC for Academic Affairs Designation to be Determined by the Donor
UIUC	113333LF	Public Safety Designation to be Determined by the Donor
UIUC	113333LL	Social Work Designation to be Determined by the Donor
UIUC	113333NJ	Student Affairs Designation to be Determined by the Donor
UIUC	113NB223	Uni High Designation to be Determined by the Donor
UIUC	113333LC	Veterinary Medicine Designation to be Determined by the Donor
UIUC	113333NE	Vice Chancellor for Research Designation to be Determined by the Donor
UIUC	113333NU	Athletics Designation as Determined by the Donor

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RESEARCH REFERRALS

UNDERSTANDING THE UIF RESEARCH REFERRALS PROCESS

The UIF Research and Portfolio Management (RPM) Department assigns plans to unit-specific Referrals records based on affiliation, past giving, initiatives, or fundraiser turnover. Referrals records are set up with an Advancement Staff constituency so the Fundraiser: Portfolio tabs match those on an actual fundraiser's record, and the Referrals record name appears as the Primary Manager.

Plans "managed" by RPM Referrals records are:

- Prospects identified, vetted, and referred by UIF RPM Prospect Development Analysts (PDAs),
- Transfers from fundraisers' portfolios (typically placed temporarily when they leave a unit and a new fundraiser has yet to be hired as a replacement),
- Prospects identified by initiatives, such as marketing programs, UIF Engagement Center activities, or UIF Board and Donor Relations initiatives,
- Prospects identified by advancement staff members.

Fundraisers can go to their unit's Referrals record when they need new prospects to qualify. If a referral does not have pending or completed steps entered by another fundraiser, they can contact the prospect to begin the qualification process. If a referral *does* have pending or completed steps, the fundraiser should contact the step owner before engaging with the prospect.

Using Referral Records

The naming format for Urbana (UIUC) Referrals records is Referrals: U [unit] (e.g., Referrals: U FAA). Springfield (UIS) also has Referrals records by unit (e.g., Referral: S PAE); however, Chicago (UIC) has one record containing all of their referral plans (Referrals: UIC). UIF, Discovery Partners Institute (DPI), and UIF Gift Planning and Trust Services (GPTS) also have their own Referrals records.

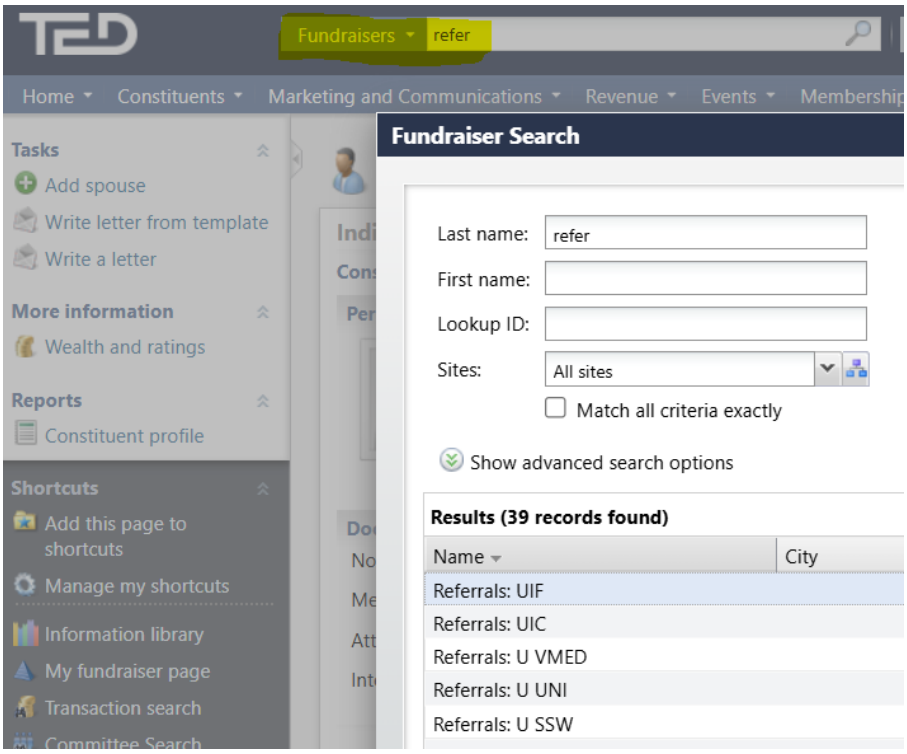
To add a referral for UIS and UIUC, the RPM PDA assigned to a unit creates a Qualification Plan on a household and assigns the unit's Referrals record as the Primary Plan Manager. For UIC, the PDA creates the appropriate gift plan and assigns the Referrals: UIC record as the Primary Plan Manager.

Viewing Referrals in TED

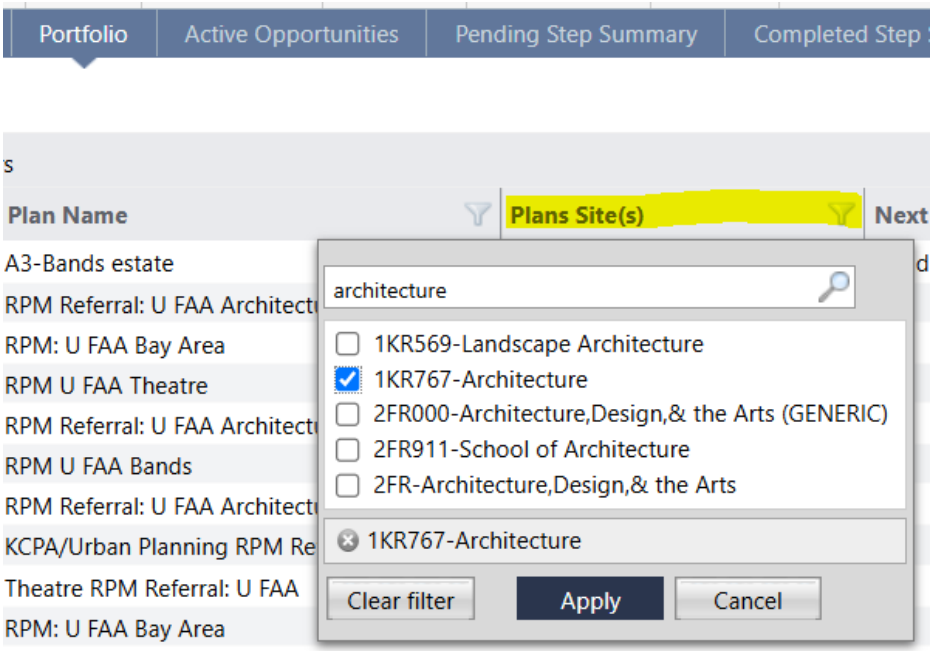
1. The easiest way to find a Referrals record is to do a Fundraiser search on "refer" and select the unit you're looking for. If you know the name or abbreviation used for your unit's record, you can also type an asterisk in the search field with the name or abbreviation (e.g., *FAA or *Media). Using the Fundraiser search, as opposed to a Constituent search, will automatically bring up the Fundraiser tab. You can then click on the Portfolio tab to see the plans on the record.

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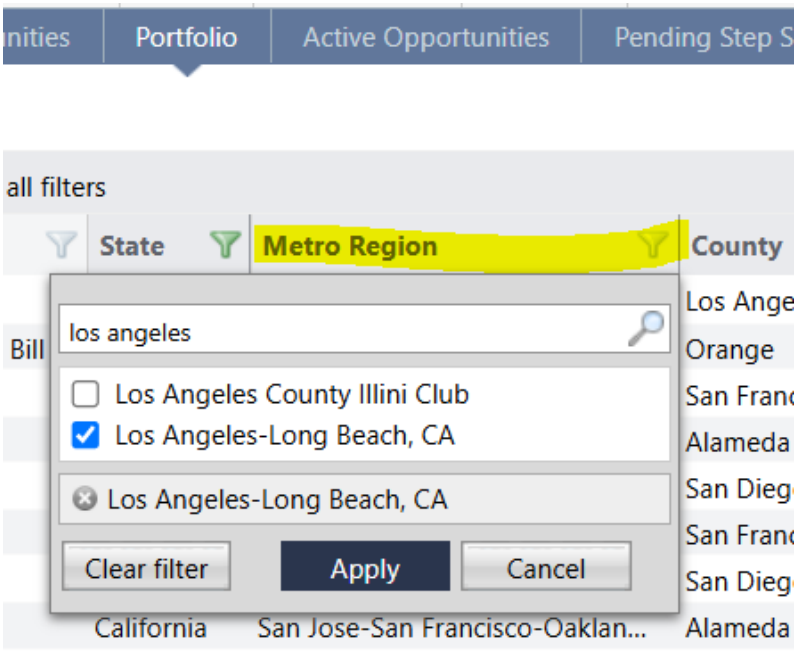


2. If you're looking for plans with a department-level Plan Site or within a certain geographic area, filter on the appropriate column heading to narrow the results.



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Viewing Referrals via the Referrals by Geographic Region Report

The Referrals by Geographic Region report is an alternate way to view referrals, and it offers different output fields that you may field useful.

1. Navigate to the report by selecting **UI Reporting** in the navigation bar and clicking the **Referrals by Geographic Region** report in the Development Performance section.
2. Select your criteria by Advancement Unit or Department. Selecting Geographic information is optional, but in order to select counties or zip codes, you must first select a state.
3. See the Referrals by Geographic Region documentation for more detailed information.

Working with Referrals

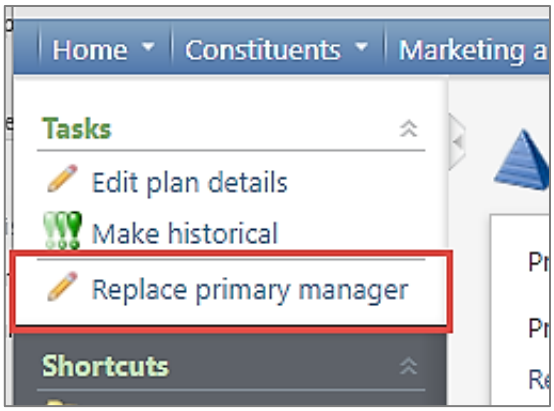
Because referrals are created for specific sites, only fundraisers associated with the site on the plan should add pending or completed steps. If you represent a different unit, you should create your own plan to record activity.

Once a fundraiser identifies a referral assigned to their unit pool that they want to qualify, the fundraiser should add steps to document their completed or pending contact attempts. Fundraisers should follow all relevant prospect management policies regarding engagement of prospects who are (a) already under management, (b) have completed or pending steps on other referral plans, or (c) whose primary affiliation is not with their unit and thus requires permission from the primary-affiliated unit's senior advancement officer.

When a fundraiser secures a qualification meeting with a referred prospect, the fundraiser should use the **Replace primary manager** action in the **Tasks** sidebar menu to change the primary plan manager to themself.

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RESEARCH REQUESTS

REQUESTING RESEARCH ON CONSTITUENTS

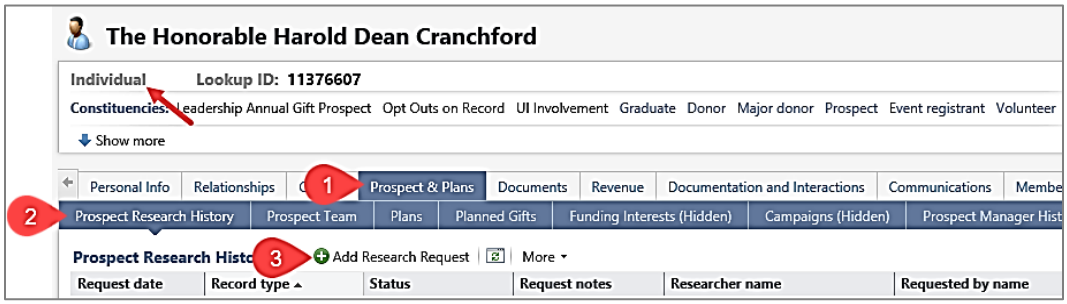
The Research Request function of TED is designed to allow fundraisers to request additional prospect research from the UIF Research and Portfolio Management (RPM) team. Research requests can also be filed to request revenue association and other specialized tasks that RPM performs.

Accessing the Research Request Form

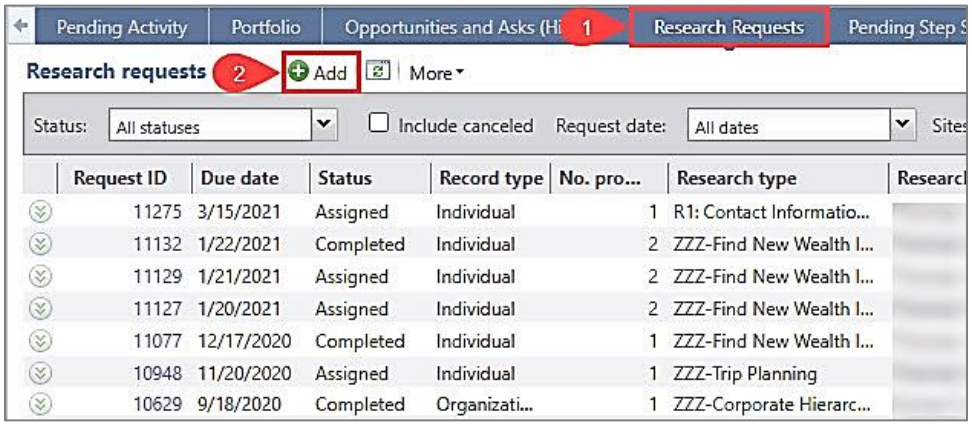
The form used to submit a Research Request can be accessed in three ways: From the constituent record, the Fundraiser page and from the Prospect menu in the navigation bar. Submitting a Research Request from the constituent record is recommended since it will pre-fill information that would otherwise need to be entered manually.

From the Constituent record

Begin on an individual constituent record or organization record.



1. Select the **Prospect & Plans** tab.
2. Select the **Prospect Research History** sub-tab.
3. Click the **Add Research Request** button.



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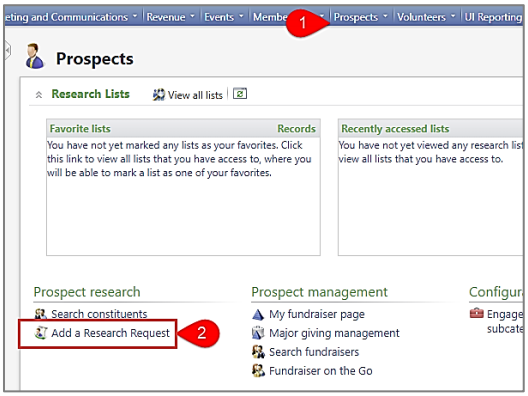
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From the My Fundraiser Page

1. From the My Fundraiser page, click the **Research Request** button.
2. Click the **Add** button.

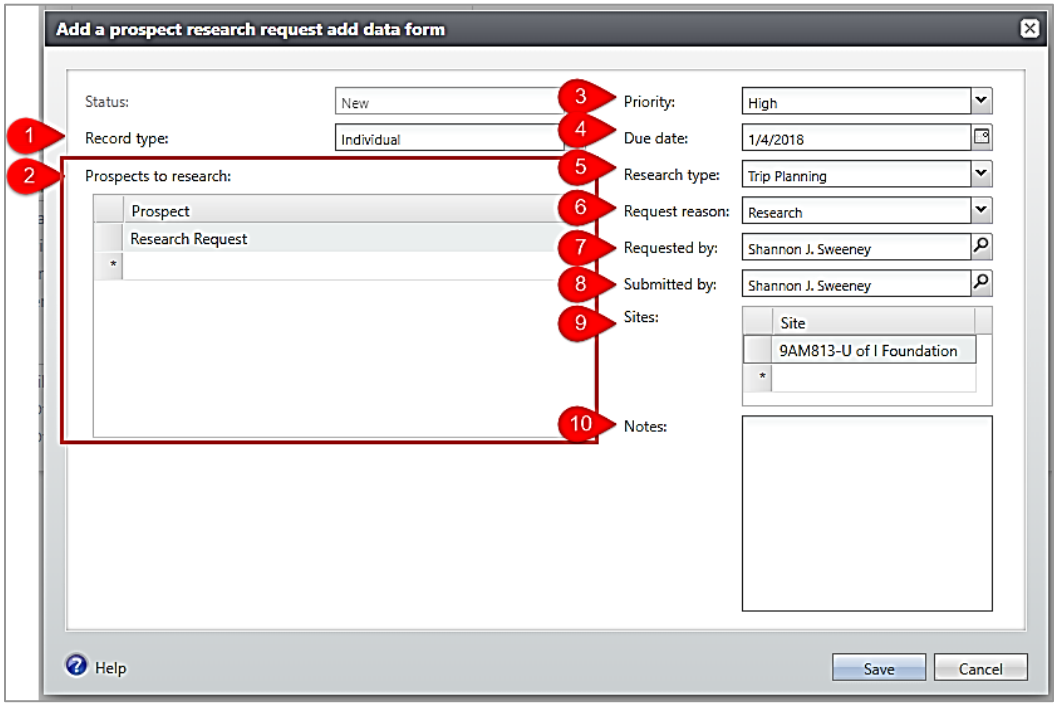
From the Prospect Menu

1. Select the **Prospect** menu to display all available tools.
2. Click the **Add a Research Request** button.



Completing the Research Request Form

Start the Research Request by using any of the methods previously detailed to open the **Add a prospect research request add data form** window.



1. Select the appropriate **Record type**: **Individual** for a person (or multiple people), and **Organization** for an organization or multiple organizations.

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2. In the **Prospects to research** field select the appropriate **Prospect(s).** You must select at least one prospect and can add up to five prospects as required.
    a. For requests involving groups of people, including ones that may be unknown (such as when requesting a Targeted Prospecting List), choose the **Research Request** constituent record **#10992367** and add the details of what type of constituent should be included in the list request in the **Notes** section. This should include number of prospects needed, ZIP codes or geographical location, and any additional details deemed necessary to generate an appropriate list of prospects.
3. Select **Priority** based on personal preference.
4. Select the **Due date** that you need the information by. The due date auto-populates with a date two weeks in the future. UIF Research and Portfolio Management has a standard two-week response time.
5. Select the **Request Type** based on the type of research needed:
    a. **Revenue Association** – Allows fundraisers to receive credit for their work by associating gift revenue to a plan opportunity.
    b. **R1: Contact Information Research** – Validates existing contact information and looks for new phone numbers, email addresses, mailing addresses, or LinkedIn profiles.
    c. **R2: Wealth Estimate** – Obtains preliminary estimates for giving capacity calculated by third party vendors. This is a quick way for fundraisers to get a sense of what possible giving capacity may be appropriate for a prospect. *Note*: For in-depth capacity research on a prospect who has been qualified and is now being cultivated, please request R4: Capacity Verification.
    d. **R3: Employment and Community Involvement Research** – Updates current employment data and relationships that are used to store involvement in non-UI activities, such as volunteering and board service for community organizations. May also include the addition of media links and other relevant and recent information pertaining to the request.
    e. **R4: Capacity Verification** – Validates public assets and calculates Estimated Giving Capacity (EGC) for a prospect. *Note*: If a quick sense of giving capacity is needed due to being in earlier stages of prospect management, please request a R2: Wealth Estimate.
    f. **R5: Extensive Research** – Validates all existing prospect data (contact information, employment and community involvement, wealth and capacity ratings) and looks for historical and supplemental information, including employment and education history, relevant familial relationships, honors awarded, membership in professional societies of note, and board service.
    g. **R6**: **Due Diligence Research** – Involves extreme vetting of prospects reserved for naming opportunities and other high-value purposes requested by the UIF Executive Operations Team. Extreme vetting includes but is not limited to proactive assessment for reputational risk. Research findings and assessments are compiled to create a due diligence briefing report.

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h. **Targeted Prospecting List** – Curated collections of the best referrals that have been identified for a specific objective, such as planning a trip or filling available space in a portfolio, prioritizing quality over quantity. *Note*: To learn about the aggregate characteristics of a group of prospects, please request a Unit Prospect Pool Analysis.
i. **Bulk Plan Loading –** Used to create a set of plans with a similar objective and is used for loading stewardship plans.
j. **Organization Records Cleanup** – Can be requested to merge duplicate organization records or clean up associated hierarchies.
k. **Corporate/Foundation Profile** – Allows CFR staff to request reports for organizations under plan management.
l. **Unit Prospect Pool Analysis** – Provides a high-level overview of a unit's prospect pool with summary statistics and breakdowns by prospect rating, metro region concentration, lifetime giving, and other features. *Note*: If a curated list of referrals is needed, please request a Targeted Prospecting List.
m. **Other** – Reserved for requests that are not described by the other choices above.

6. Select the **Request Reason** based on the reason of research needed:
    a. **Identify/Qualify Unmanaged Prospects** – Used for requests related to the Assessment and Qualification stages of the fundraising process.
    b. **Cultivate/Solicit Managed Prospects** – Used for requests related to the Cultivation and Solicitation states of the fundraising process.
    c. **Steward/Managed Prospects** – Used for requests related to the Stewardship stage of the fundraising process.
    d. **Plan Closure** – Used for requests related to the Closure stage of the fundraising process.
    e. **Record Cleanup** – Used for Organization Records Cleanup requests.
    f. **Other** – Used for requests that are not described by the other choices above.
7. Select the fundraiser who will receive the information from the **Requested by** field.
8. Select who made the request from **Submitted by** field. Generally, this is the same as the Requested by but may be a different person.
9. Select **Site** where the fundraiser is employed. You can use the drop-down menu or click the magnifying glass for a search. The site selection determines the assignment of the research request and helps to expedite routing to the correct team member.
10. Add any other pertinent information to the **Notes** section

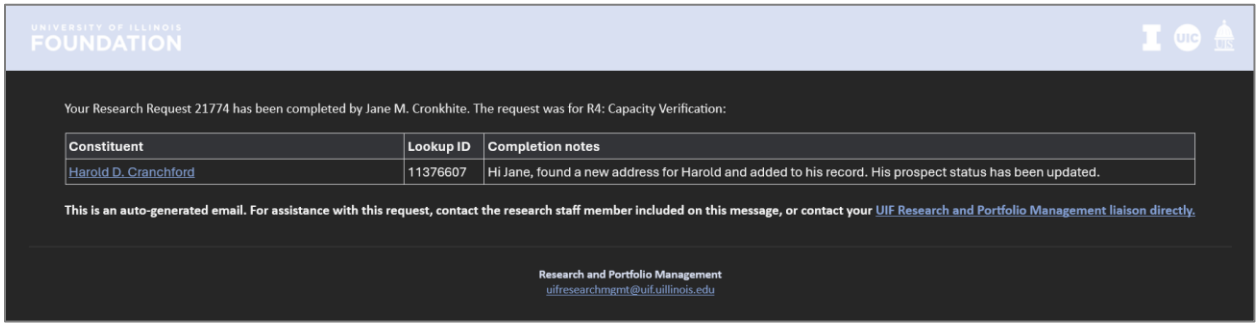
Gift officers can confirm that a research request has been submitted by reviewing the request two ways. On the constituent's record, there is a yellow notification bar under the constituent's name that says, "Prospect research request is open." A gift officer can also navigate to the Research Request sub-tab on their Fundraiser tab to see all Research Requests that have been submitted, including those that have been Completed or are still In Progress.

Once the Research and Portfolio Management staff member has completed the request, you will receive an email detailing what research was completed. The email will include:

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- The research request ID number
- The constituent(s) name and Lookup IDs
- A brief summary of the research completed


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Your Research Request 21774 has been completed by Jane M. Cronkhite. The request was for R4: Capacity Verification:

Constituent	Lookup ID	Completion notes
Harold D. Cranchford	11376607	Hi Jane, found a new address for Harold and added to his record. His prospect status has been updated.

This is an auto-generated email. For assistance with this request, contact the research staff member included on this message, or contact your UIF Research and Portfolio Management liaison directly.

Research and Portfolio Management
uifresearchmgmt@uif.uillinois.edu

You can view the status of your current and past Research Requests via the **Fundraiser > Research Request** tab.

You can also see all research requests for a particular prospect by navigating to their individual constituent record in TED and choosing **Prospects & Plans > Prospect Research History**.

UPDATED 4/11/25

CREATE OR EDIT PROSPECT PLANS

IDENTIFYING AND DOCUMENTING THE PLAN STRATEGY

Prospect plans were developed specifically for fundraising teams to use to communicate, strategize, and record their work. Prospect plans document and preserve the strategic actions undertaken by advancement officers in a clear and concise manner. Prospect plans detail the planned or completed work necessary for fundraisers to engage, qualify, cultivate, solicit, and steward donors.

Other documentation is available for working and managing large-scale, repeatable stewardship (typically related to stewardship of funds) via stewardship plans.

Individuals vs. Organizations

Prospect Plans on Individuals

Prospect plans for individuals (people) are added their **household record**. The household members are added as plan participants; this happens automatically through a nightly process that runs in TED. Other plan participants should be added as appropriate. For example, if a gift is expected to come through an individual's business or family foundation, that organization should be added as a plan participant.

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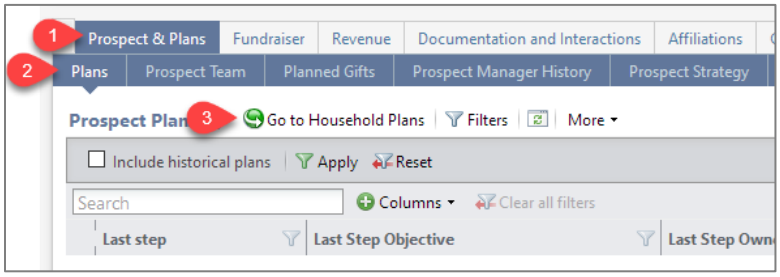
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Prospect Plans on Organizations

Corporate or Foundation plans are added to the primary organization of a corporate hierarchy. Other plan participants should be added as appropriate. For example, if a CFR officer is working closely with a subsidiary organization, the subsidiary organization should be added as a plan participant with a role of Organization Member.

Creating a Prospect Plan

Prospect plans must be added to constituents' **household records.** If you are viewing an individual record, follow the steps below to navigate to the household record.

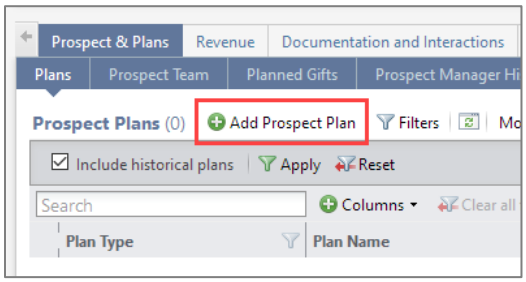


4. Select the **Prospects & Plans** tab on the Individual record.
5. Select the **Plans** sub-tab.
6. Click the **Go to Household Plans** button.

If you are on the household record, begin by selecting the **Prospect & Plans** tab.

Then select the **Plans** sub-tab to view active plans.

Once on the Plans sub-tab, click the **Add Prospect Plan** button to open the *Add prospect plan for…* window to create the plan.



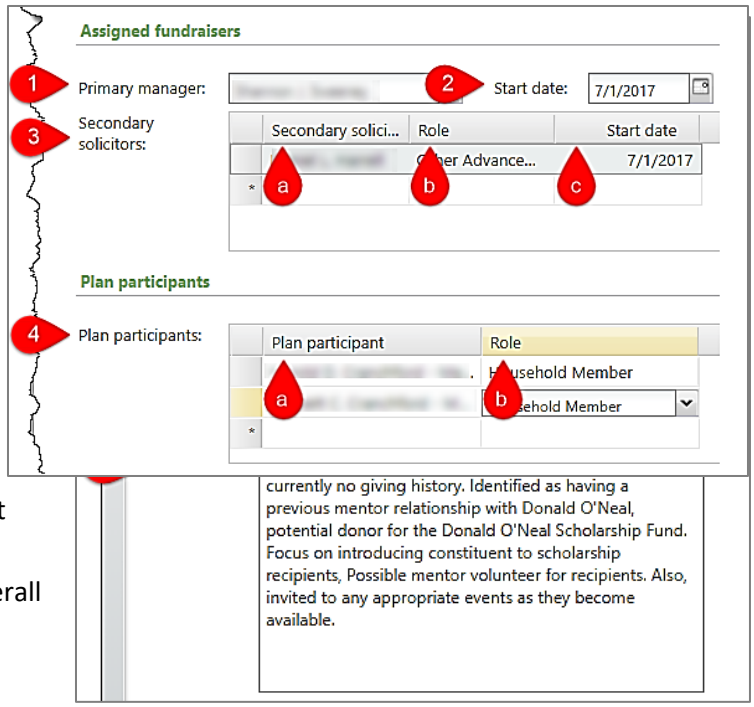
Entering Prospect Plan Details

Start entering the new prospect plan details in the Details tab.

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1. Enter a **Plan Name** that is meaningful to you.
2. Select an appropriate **Plan Type**.
3. The **Start Date** is the day the plan began. This value also populates the dates for any template steps added via the **Steps**.
4. The **Site** or **Sites** which will receive the donation. This information may be unknown, in which case, select the site most closely associated.
5. The **Narrative** documents the overall strategy for the prospect plan.



1. Add the **Primary (Plan) Manager** for the prospect plan. Select the advancement officer by either typing their last name into the field or by clicking the magnifying glass to open a search window.
2. Add the **Start Date** for the day the Primary Manager started the plan.
3. Any **Secondary Solicitors**—advancement staff who are assisting with the plan—should be added to ensure they receive credit for work completed.
    a. Secondary Solicitors can be found by searching for their names under the **Secondary Solicitor** column.
    b. Each Secondary Solicitor must be assigned an appropriate **Role**.
    c. Each Secondary Solicitor must be assigned a **Start Date**.
4. **Plan Participants** are anyone associated with the plan who are not Advancement Staff. This includes external constituents (the prospect, businesses, lawyers, advisors) and UI staff who are not advancement employees (e.g., faculty members).
    a. Members of the household are automatically added to the plan in a process that runs overnight Monday through Friday. Additional plan participants can be added to the **Plan Participant** field by searching for their name using the magnifying glass, or by typing their last name into the available field.
    b. Each Plan Participant must be assigned a **Role**. The automated process that adds household members as Plan Participants will give them a role of Household Member. All other Plan Participants should have a role *other* than Household Member.

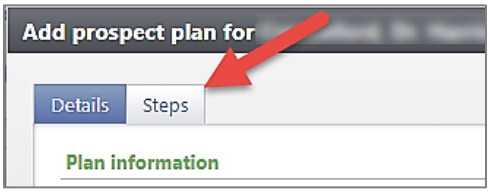
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Once the prospect plan details have been entered, you can click the Steps tab to add plan steps using available templates. You can also save the plan as-is and add steps later.

Adding Steps

Select the **Steps** tab to apply a plan or step template. Templates let you efficiently create steps in bulk rather than manually creating them individually.



Saving with No Steps

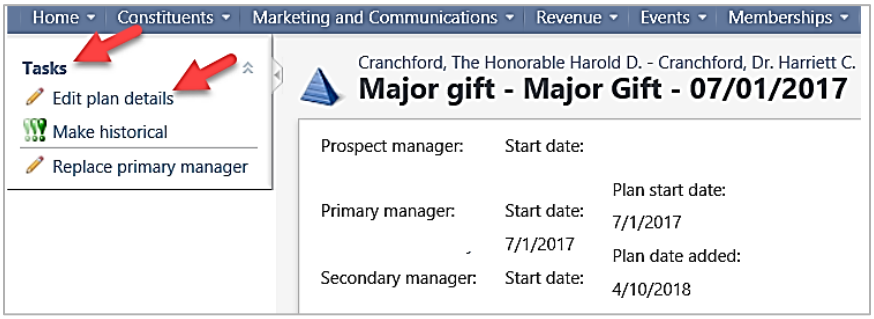
Select **Save** from the lower left-hand corner to create the plan without adding steps at this time.

Edit the Plan

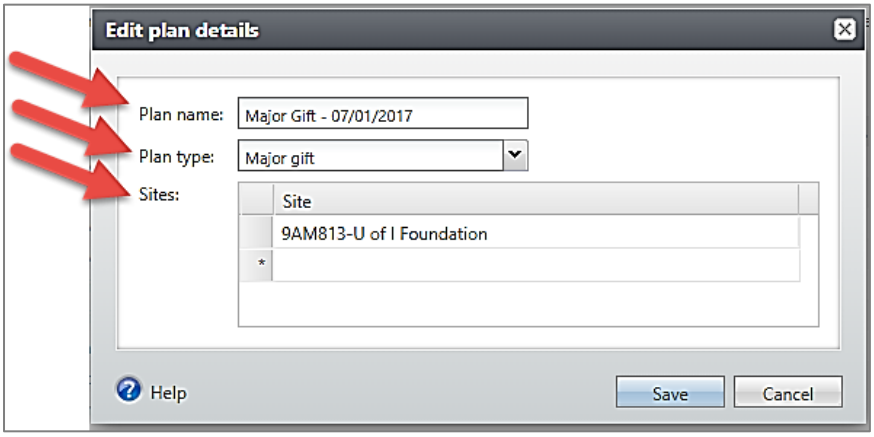
Plans can be edited to change the plan details, update team members, edit and complete steps, and make the plan historical.

Editing Plan Details

Once inside a plan, editing prospect plan details is done from the **Tasks** menu in the left sidebar.



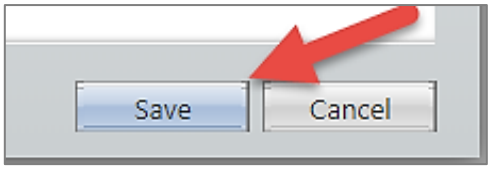
Select **Edit plan details** to edit the Plan name, Plan Type, or Sites associated with the plan.



- **Plan types** should reflect the nature of the work being completed. That can mean editing the plan type from Qualification to Major Gift, for example, once a successful qualification has been completed.
- **Sites** should be edited to add or correct site information as gift officers learn more specific information about the intended recipient of a gift.

Editing the Narrative

The plan narrative can be updated from the **Details** tab of the prospect plan record.



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While viewing the prospect plan, select the **Details** tab and click the **Edit** button.

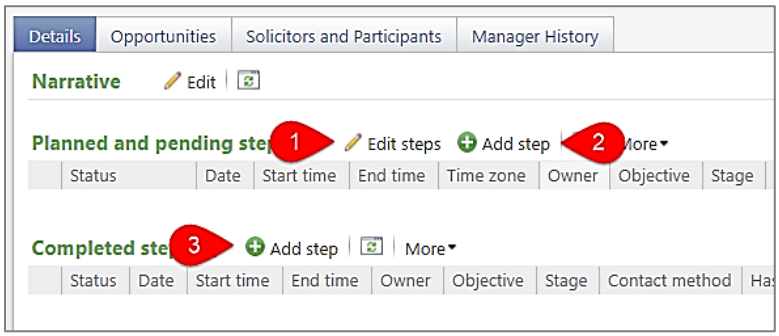


Do not use the plan narrative to store information that belongs on a step, such as the summary of a recent meeting.

Editing Plan Steps

All prospect plan steps are displayed on the **Details** tab of the prospect plan record. Pending steps also display on the advancement officer's Fundraiser page under the **Pending Activity** tab as a reminder of activity that needs to be completed.

Plan steps will not display in the **Completed Steps** section until a value has been entered for the Actual Date field on the step. Completed steps display in the **Completed Step Summary** tab of the advancement officer's Fundraiser page.



1. The **Edit steps** option is used to add, edit, or delete steps in bulk.
    a. Plan and step templates can be used using this menu.
    b. Steps can be edited in bulk using this menu.
    c. Steps can be deleted in bulk using this menu.
2. Use the **Add step** button in the **Planned and pending steps** section to manually add a single step.
3. Use the **Add step option in the Completed steps section** to manually add a single step that has been completed.

Edit the Plan Opportunity

Opportunities are added and edited from the Opportunities tab on the prospect plan record. It is important to note that while the tab says Opportunities, **only a single opportunity can be added to a prospect plan.**

One Prospect Plan = One Opportunity

To add an opportunity, click the **Add** button.

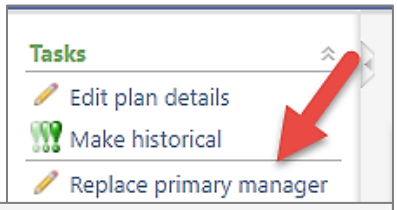
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Edit Team Members and Plan Participants

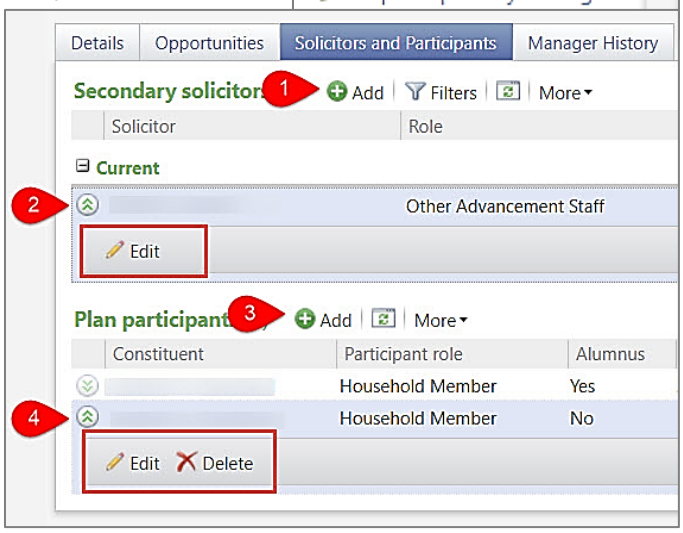
Primary Plan Manager

The Primary Plan Manager can be replaced using the **Replace primary manager** action under the Tasks menu in the left sidebar. Plan managers can be replaced but not end-dated.

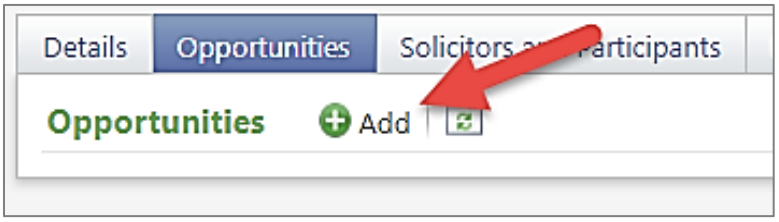


Secondary Solicitors and Plan Participants

1. Use the **Add** button in the **Secondary Solicitors** section to add additional advancement staff.
2. To make any changes to a secondary solicitor, click the double chevrons and click **Edit**.
3. Use the **Add** button in the **Plan Participants** section to add additional plan participants.
4. Click the double chevrons to the left of a plan participant's name to edit or delete their role.
    - To make any changes to the participants, click **Edit**. The automated process that adds household members to the plan as plan participants will also update any household members already assigned to the plan with the participant role of Household Member, no matter what the prior role was.
    - If the plan participant should be removed from the plan completely, click **Delete**.



UPDATED 12/12/24



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USING A PLAN TEMPLATE OR STEP TEMPLATE

LET TED DO SOME OF THE WORK

Plan and step templates were designed to allow advancement officers to quickly and easily add steps to their plans. The available templates contain a basic outline of strategic steps that corresponds to the plan type being created or the specific action that is being planned. Steps can be added and edited easily when first opening a plan or after it has been created. **Templates save you time by eliminating the need to manually enter all fields when creating steps.**

Template Types

There are two types of available outlines that can be used to add steps to plans: plan templates and step templates.

Plan Templates contain the basic strategic framework for the given type of plan. They contain multiple steps for different types of actions that are typically undertaken for that plan type. In practice, steps can be deleted or customized as necessary.

Step Templates are focused on a specific type of activity instead of a type of plan. Step templates might contain a single step to streamline data entry or may have multiple steps (such as a "contact attempt" cycle with multiple outreach attempts).

Using Templates

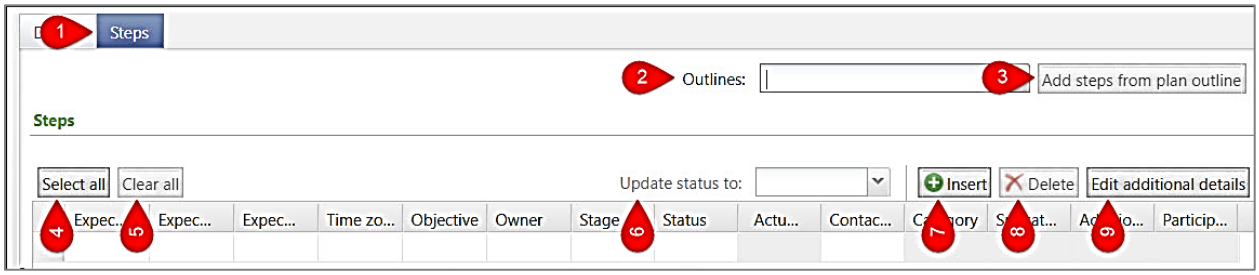
Plan templates and step templates can be added to the plan in two different ways: from the Steps tab of the Add a Plan window as the plan is created, or from the Details tab on the plan after it was created.

From the Add a Plan Window

When creating a new plan, first complete all necessary fields in **Details** tab of the **Add prospect plan for** window. **This is important because certain fields on this tab must be completed for the templates to load properly.** When finished, move to the **Steps** tab.

From the Steps Tab

Add and update the step details as needed.

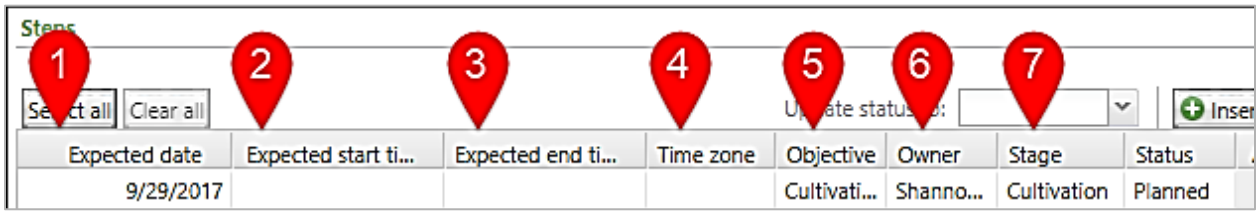


1. Begin on the **Steps** tab of the *Add prospect plan for…* window.
2. Select the appropriate outline from the **Outlines** drop-down menu.

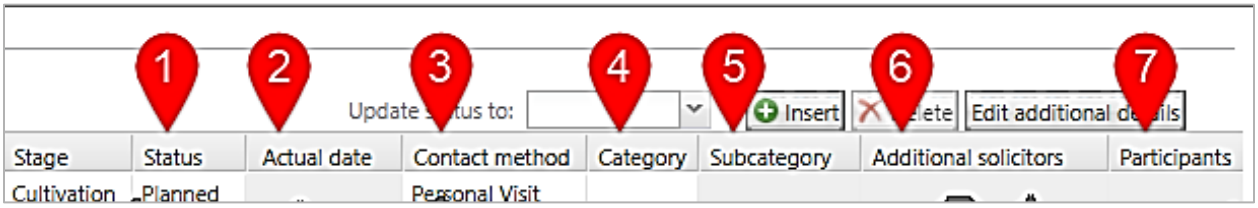
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3. To add the selected template steps to the grid below, click the **Add steps from plan outline** button.
4. The **Select all** option will select all the steps that were entered for editing or deletion.
5. **Clear all** becomes available after Select All has been selected. This option does not clear steps; it only removes the Select All option.
6. Used with either Select all, or after selecting a specific step, **Update status to** allows you to change the status of the step(s) to Planned, Pending, Completed, Cancelled, or Declined.
7. Select **Insert** to add an additional blank step to the grid below.
8. Used with either Select all, or after selecting a specific step, **Delete** will delete the step(s). Steps can also be deleted by selecting the grey box to the left of the step and pressing the delete key.
9. After selecting a specific step, use the **Edit additional details** option to open the step in a larger window allowing you to edit all details of the step more easily.



1. **Expected Date** – Anticipated date the step will take place.
2. **Expected start time** – Anticipated time of day the step will begin. This is not a required field.
3. **Expected end time** – Anticipated time of day the step will end. This is not a required field.
4. **Time zone** – Time zone associated with when the step will happen. This is not a required field, but if expected start and end times are used, add the time zone.
5. **Objective** – A brief but relevant statement indicating what should happen during the step.
6. **Owner** – Identifies the advancement staff that has been assigned to complete the step.
7. **Stage** – Associated with what stage of the process the plan is in when the step takes place.



1. **Status** – Indicates when in the strategic plan the step will take place. Specific status types update different tabs in the fundraiser's Fundraiser page including the Pending Activity and Planned Step Summary tabs.
2. **Actual Date** - Actual date the step was performed. This is never a future date. This field becomes required when the step is marked as Completed.
3. **Contact Method** – This field is associated with how the constituent will be or has been contacted.
4. **Category** – Available categories are General Interactions and Plan Step. **Plan Step** should always be selected when associated with a plan. This is a required field.

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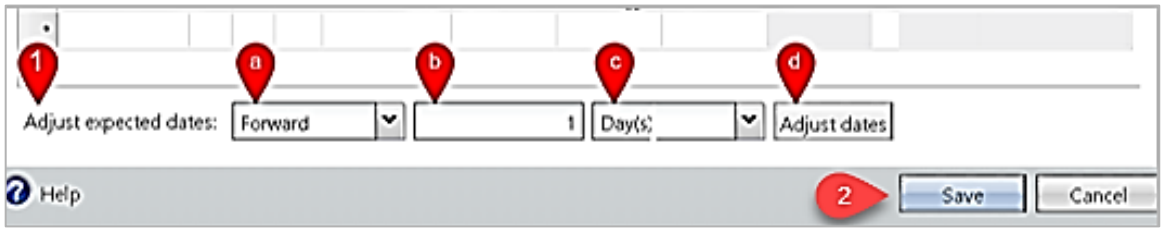
5. **Subcategory** - The subcategory is not available until the category has been selected, and then it becomes a required field. The subcategory provides further detail on the step. Available values are:
    a. **Attempted – Not Reached** – Advancement staff is unable to reach the constituent; mostly used with phone, email, or mailings.
    b. **Gift Planning** –The work done is specifically associated with Gift Planning.
    c. **No Subcategory** – No other subcategory fits.
    d. **Plan Strategy** – Used on a completed step that clearly documents the role of each fundraiser in managing the donor relationship and the strategy for the desired outcome of the plan. Documenting the plan strategy is one way that fundraisers can demonstrate the rationale for participating as secondary solicitor on a plan.
    e. **Qualified | Leadership Annual Giving Prospect** – Indicates prospect was qualified to have capacity, inclination, and readiness to give at the leadership annual giving level (<$25,000 over a five -year period). This subcategory will be entered on the interaction where the qualification process was completed.
    f. **Qualified | Major Gift Prospect** – Indicates prospect was qualified to have capacity, inclination, and readiness to give at the major giving level in the next 24 months ($25,000+ over a five- year period). This subcategory will be entered on the interaction where the qualification process was completed.
    g. **Qualified, UIC Annual Giving** – Indicates the prospect was qualified to have capacity, inclination, and readiness to give at an annual giving level. This subcategory will be entered on the interaction where the qualification process was completed.
    h. **Qualified, Not a Prospect | Not at this level** – The prospect has been qualified but may not be willing to donate at the corresponding opportunity or plan type level.
    i. **Qualified, Not a Prospect | Not at this time** – The prospect has been qualified but is not interested in donating at this time.
    j. **Qualified, Not a Prospect | Not for this Unit** – The prospect has expressed disinterest in supporting a particular advancement unit.
    k. **Qualified, Not a Prospect | Other** – For disqualified prospects that do not fit into other QNP categories.
    l. **Qualified, Not a Prospect | Unresponsive** – A prospect that fundraisers disqualify based on their unwillingness to engage.
    m. **Referral | UIC Annual Giving** – Prospect identified by the UIC Annual Giving team and referred to a frontline fundraiser. This subcategory will be entered on a Qualification Plan by the advancement staff making the referral.
    n. **Referral | UIF Board and Donor Relations** – Prospect referrals identified by UIF Board Directors and vetted by UIF Research and Portfolio Management (RPM) and UIF Board and Donor Relations. This subcategory will be used by RPM when creating and tracking referrals initiated by UIF Board and Donor Relations.
    o. **Referral | UIF Engagement Center** – Prospect identified by the UIF Engagement Center and referred to a frontline fundraiser. This subcategory will be entered on a Qualification plan by UIF Research and Portfolio Management.

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p. **Referral | UIF Gift Planning and Trust Services** – Prospect identified by the UIF Gift Planning and Trust Services team as a potential estate gift prospect. This subcategory will be entered on a Qualification plan by UIF Research and Portfolio Management.
q. **Referral | UIF Research and Portfolio Management** – Prospect with capacity vetted by UIF Research and Portfolio Management and referred to a frontline fundraiser. This subcategory will be entered on a Qualification Plan by a UIF researcher.
r. **Referral | Frontline Advancement** – Prospect identified by a frontline advancement staff person (major gift officer, alumni relations staff, annual giving officer, etc.) and referred to another frontline fundraiser. This subcategory will be entered on a Qualification Plan by the officer receiving or making the referral.
s. **Research** - If the work done in the step is specifically associated with Research.
t. **Substantive Step** – Used in the qualification, cultivation/solicitation, and stewardship plan stages. Substantive Steps are used to document any two-way externally facing communication that generates movement towards the desired outcome of the plan.

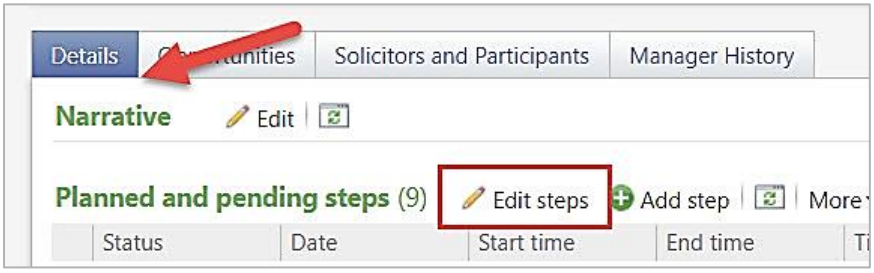
6. **Additional solicitors** – Not in use.
7. **Participants** - Not in use.



1. **Adjust Expected dates** – This option works in conjunction with the Select all option.
   a. **Dates** can be shifted forward or backward as needed
   b. This field indicates how much **time** the date should be shifted
   c. This fields indicates if the adjustment is **days, weeks,** or **months**
   d. Select **Adjust dates** to apply the dates as needed.
2. To complete creating the plan and adding the steps from the plan template, select **Save.**

From the Details Tab of the Plan

Templates can also be found on the Details tab of the plan. This allows templates to be added to plans that already exist.



Click the **Edits Steps** button on the Details tab of the prospect plan to open a new window. This is the same window displayed when creating a new plan. Follow the previous instructions to apply plan or step templates to the prospect plan.

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ADD OR EDIT PLAN STEPS

DETAILING ACTIVITIES AS PART OF THE PLAN STRATEGY

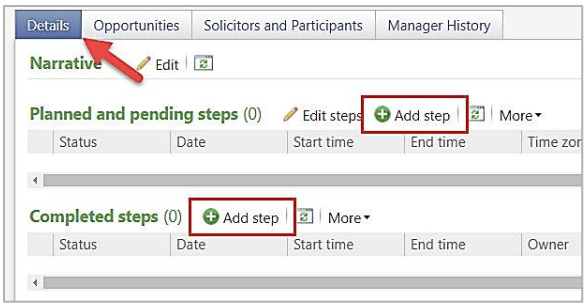
Plan steps document and preserve the strategic actions taken by an Advancement officer, such as:

- Process of qualifying a constituent
- Cultivating a relationship with a constituent
- Soliciting a gift from a constituent
- Stewarding a constituent's donation

Steps are added and edited as needed during the process. Steps can be added either in bulk or as a single instance.

Add a Single Plan Step to a Plan

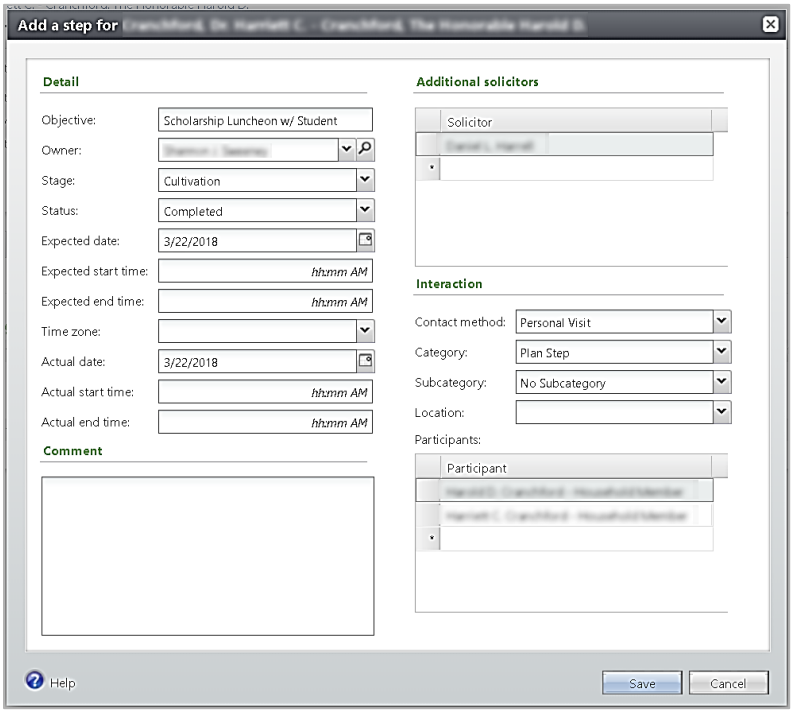
Adding a new plan step begins on the **Details** tab of the plan.



Steps can be added from either the **Planned and pending steps** section or the **Completed steps** section of the Details tab by selecting the **Add step** option. This opens the *Add a step for…* window.

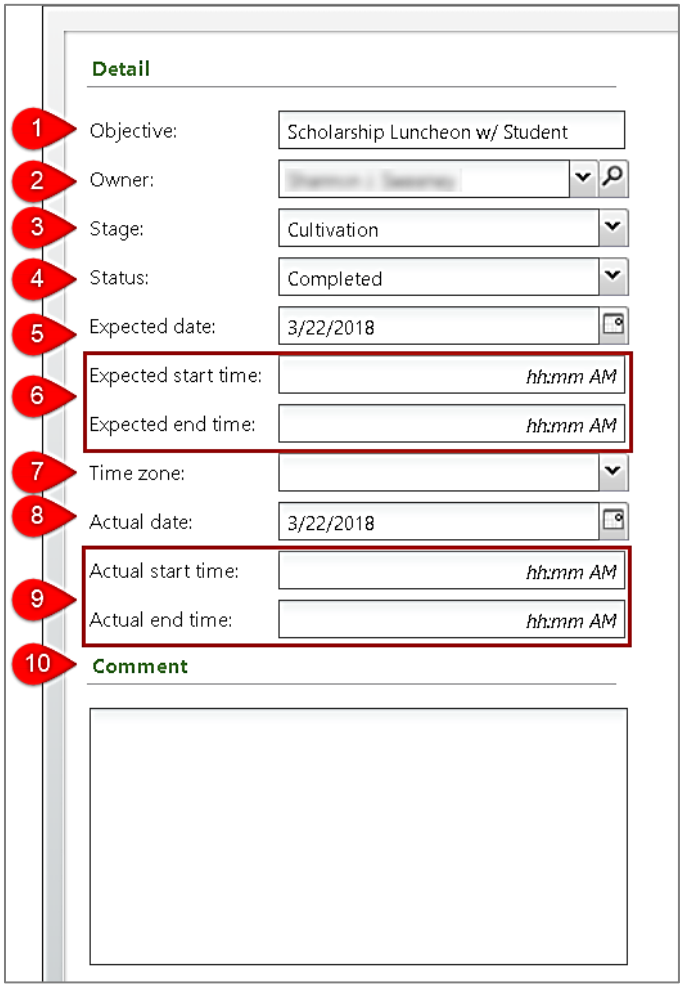
Adding a Plan Step

Complete the window as appropriate.



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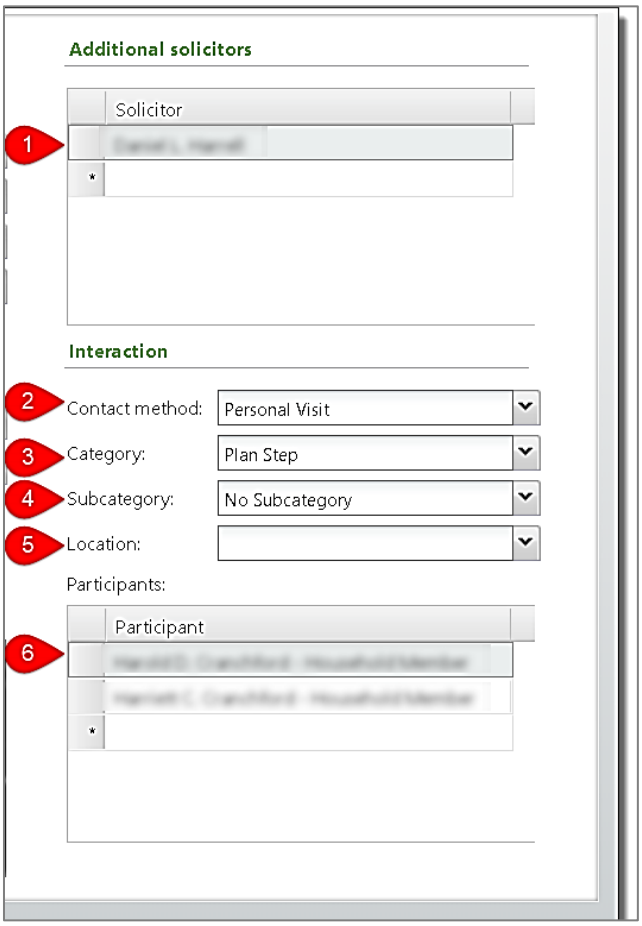
1. The **Objective** should be a brief but relevant descriptor of the step purpose.
2. The **Owner** field auto-populates with the name of the primary plan manager. The available dropdown will display the names of any Secondary Solicitors assigned to the plan. Clicking the magnifying glass lets you access the Fundraiser Search tool. Anyone indicated as Advancement Staff in TED can be added as the Step Owner.
3. The **Stage** drop-down reflects the stage of the process in which the step is taking place.

   Note: **Prospect Management Plan Stages can be referenced in the *Prospect Management Definitions* iLearn document or its section in the TED User Guide.**
4. The **Status** field indicates when the plan step will happen, or if it has already happened.
5. Adding the **Expected date** to a step populates the To Do list on the Pending Activity tab of the gift officer's Fundraiser page.
6. For planning purposes, it can be useful to indicate the time of day a step is supposed to happen. Add the **Expected start time** and **Expected end time** as needed. (These are not required fields.)
7. If Expected start time and Expected end time are used, the **Time zone** should be added. (This is not a required field.)
8. When the step has been completed, add the **Actual Date** of completion. This should not be future dated; this should only be entered once the step has been completed. This field becomes required when the step status is changed to Completed.
9. **The Actual start time and Actual end time** can be helpful in determining the length of time of the contact with the constituent. If these fields are used, add a time zone. (These are not required fields.)
10. **Notes added to the Comment field become the Contact Report** for the gift officer and the constituent. Notes in this area should be brief but descriptive; *summarize* email communications rather than copying and pasting email messages.

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1. Add anyone indicated as Advancement Staff in TED that participated in that specific step as **Additional solicitors**; multiple individuals can be added. If you hover over an entry row, a magnifying glass appears. Clicking the magnifying glass lets you access the Fundraiser Search tool to select the solicitor
2. Select the appropriate **Contact Method** from the drop-down menu based on how communication with the constituent took place. *Note*: **Prospect Management Contact Method Types can be referenced in the *Prospect Management Definitions* iLearn document or its section in the TED User Guide.**
3. There are two options available under the **Category** drop-down menu:
    a. **General Interaction – Should *never* be used on a plan step**.
    b. **Plan Step** – Should *always* be used on a plan step.



4. The **Subcategory** field becomes required once the Category drop-down has been selected. ***Note*: Prospect Management Subcategory Types can be referenced in the *Prospect Management Definitions* iLearn document or its section in the TED User Guide.**

5. The only available option for **Location** is Other. This is not a required field and is not currently being used.

6. Add any household members, organizations, or *non*-Advancement Staff constituents that participated in the step to the **Participants** field. Only constituents with a record in TED can be added. You can see the plan steps a constituent participated in by viewing their individual constituent record and navigating to the Documentation and Interactions > Interactions sub-tab.

Editing Plan Steps

Edit a plan step by using either the edit steps grid or by editing an individual step. Editing the steps grid is helpful when bulk updates are necessary, such as updating the due dates for multiple steps. Updating an individual step is helpful for more detailed work, such as entering a contact report.

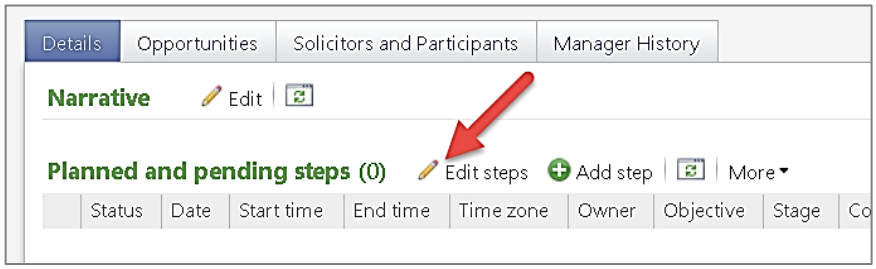
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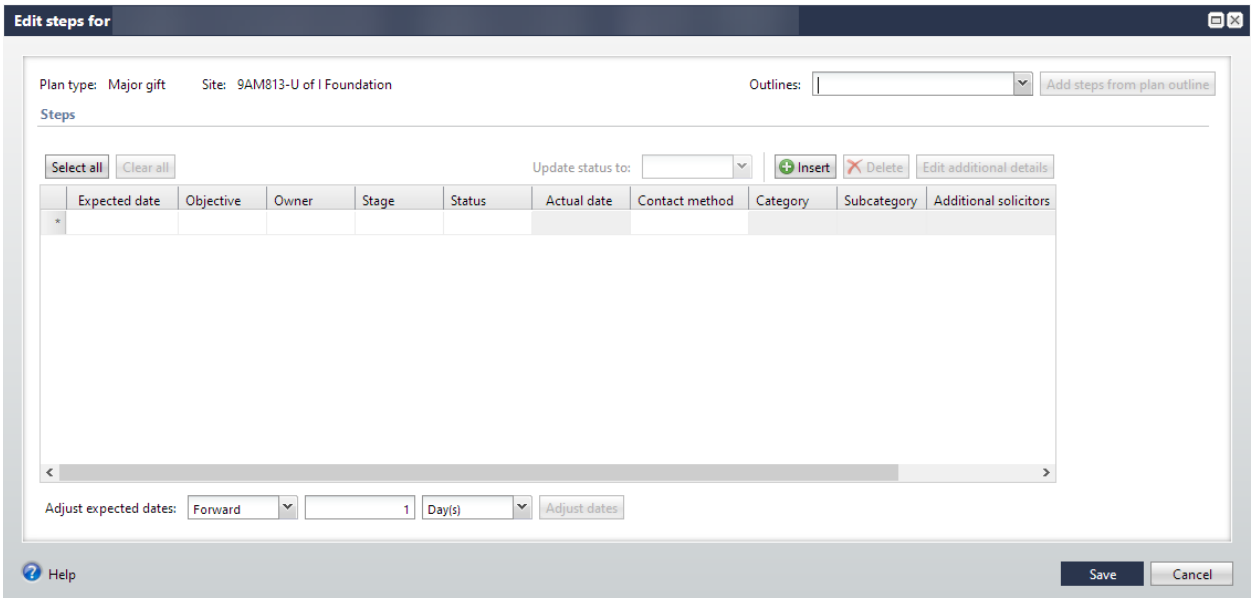
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Edit Steps Grid

Begin on the **Details** tab of the Plan.

Select **Edit Steps** in the Planned and pending steps section.





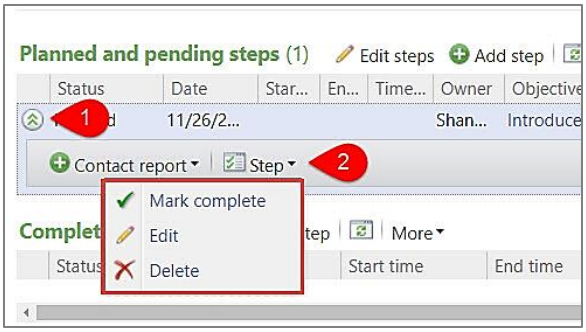
Complete the appropriate fields for the type of update/edits you are making. For detailed information on populating the steps grid with a template review the ***Using a Plan Template or Step Template*** **documentation found in either iLearn Advancement or the TED User Guide.** Please note that some fields (such as start time, end time, time zone) are not available in the edit steps grid, so please edit steps individually (by highlighting the step in the grid you want to edit and selecting **edit additional details**) if you need to enter that information.

Edit Individual Steps

Completed, Planned, and Pending steps can all be edited individually.

Begin on the Details tab of the plan.

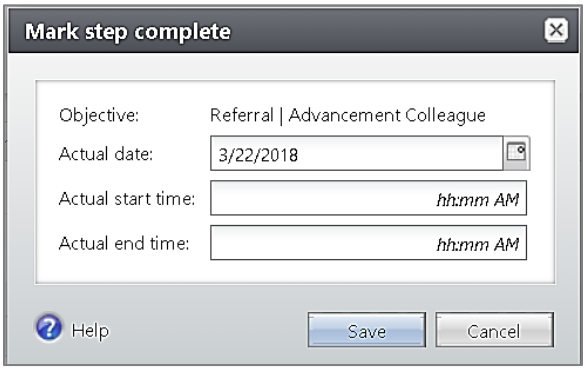
1. Select the **double arrows** to the left of the plan step that will be edited to expand the field.



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2. Select the **Step** drop down for the three available options:
    a. When selecting **Mark complete** from this field, a new window opens confirming the Actual date the step was completed. This is useful when documenting the completion of a task as no other notes can be added to the step using this option. Use of this option should be limited.



    b. Selecting the **Edit** option will expand the step window. This window is the same as the window used when adding a new step. Add and update all appropriate information as needed.
    c. Steps can be **deleted** if they will not be used and contain no comments. The following warning appears when deleting a step.



Deleting a step will remove the step from all participants' constituent records.

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CREATE, EDIT, & FIND CONTACT REPORTS

DOCUMENTING COMMUNICATION WITH THE CONSTITUENT IN THE PLAN

A **Contact Report** is communication related to qualifying, cultivating, soliciting, or stewarding a constituent. This work should be entered as **plan steps**, which may be counted in performance metrics.

Contact reports are visible on a development officer's Fundraiser page and on the constituent's Documentation and Interactions tab.

Contact Report Best Practices

A Contact Report is a detailed description of what happened during a meeting or communication exchange with a constituent. There are a few best practices to remember when adding a contact report to TED

1. Make sure the contact report contains the **who, what, why, where,** and **how** in each report.
2. A contact report should be filed to document the relationship moving forward.
3. Contact reports should be filed within **one week** of the meeting or communication exchange.
4. Only a single contact report should be filed for a meeting. If the meeting consisted of multiple constituents, add each of them to the single contact report.
5. Keep the information in the contact report **brief, relevant, and factual**.
6. Limit information regarding health, opinions, or minors.
7. Never include a minor's birthdate or birthday information.
8. Contact reports can be seen by anyone with access to the TED system and should be written with tact and respect.

Sometimes a contact report is difficult to write due to an uncomfortable interaction or circumstance. It is still important to include this information in the system. If you have any questions or concerns on how to document a sensitive exchange or issue, please speak with your supervisor.

What Is Not a Contact Report?

While most communication a development officer has with a constituent is part of a plan and should be considered a contact report, there can be exceptions. Here are some examples:

- Mass communications, such as birthday or holiday cards.
- Social interactions do not move the relationship forward.
- Significant interactions with the constituent unrelated to a gift or plan on the record. If the information is important to note, it can be added as a General Interaction.

Entering a Contact Report on a Plan Step

Contact reports are always added to plan steps. There are a few different ways of adding a contact report to a plan depending on whether the communication was planned or unplanned.

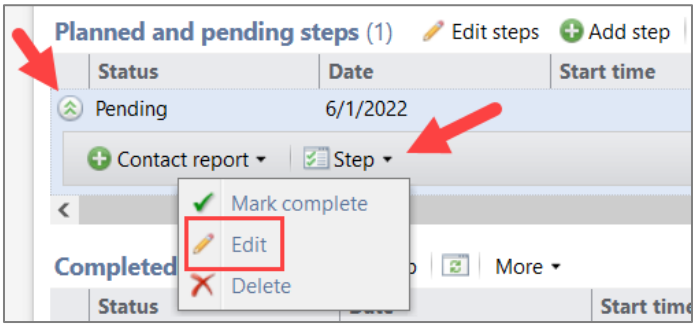
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Filing a Contact Report

There are three ways to file a contact report:

1. Edit a Pending plan step.
2. Use the **File a contact report** buttons.
3. Add a Completed step – use this option if there is no Pending Step for the communication.



Edit a Pending Step

If a Pending Step exists that pertains to the contact report you're entering, edit that step and changed the Status to Completed:

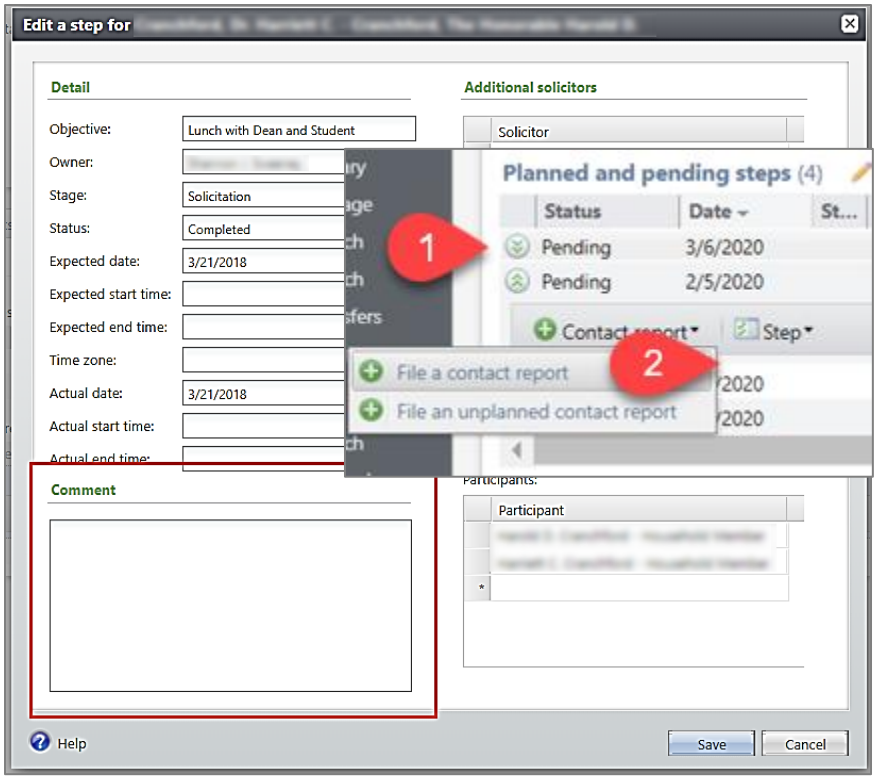
1. Click the green **double arrow** to expand the appropriate plan step.
2. Click the **Step** button.
3. Select **Edit** from the available field.

Edit the step as needed. The contact report is detailed in the **Comment** field of the step. Once the details of the communication have been added to the Comment field, change the Status to Completed, and select Save to file the contact report.

File a Contact Report

The **File a contact report** option is useful if you want to record an interaction with the prospect and update some information about the next step listed under Planned and pending steps.

1. Click the green **double arrow** to expand the appropriate Pending plan step.
2. Choose the **File a contact report** option. Clicking the

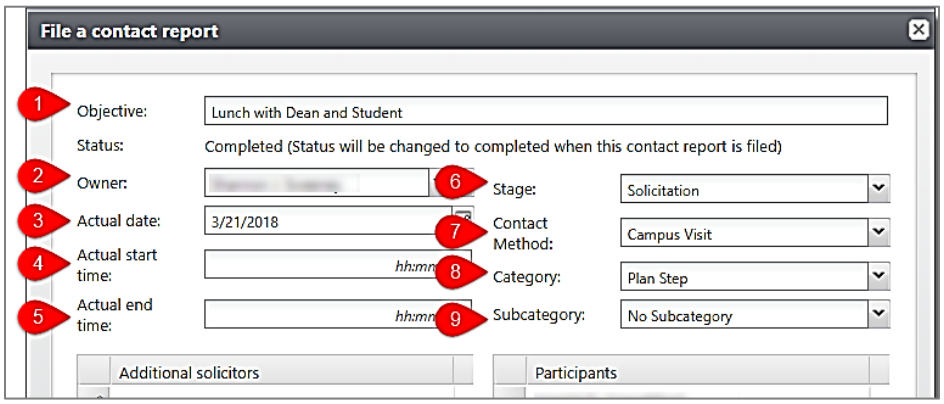


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File an unplanned contact report will bring up a form similar to the one for adding a Completed Step (see below).

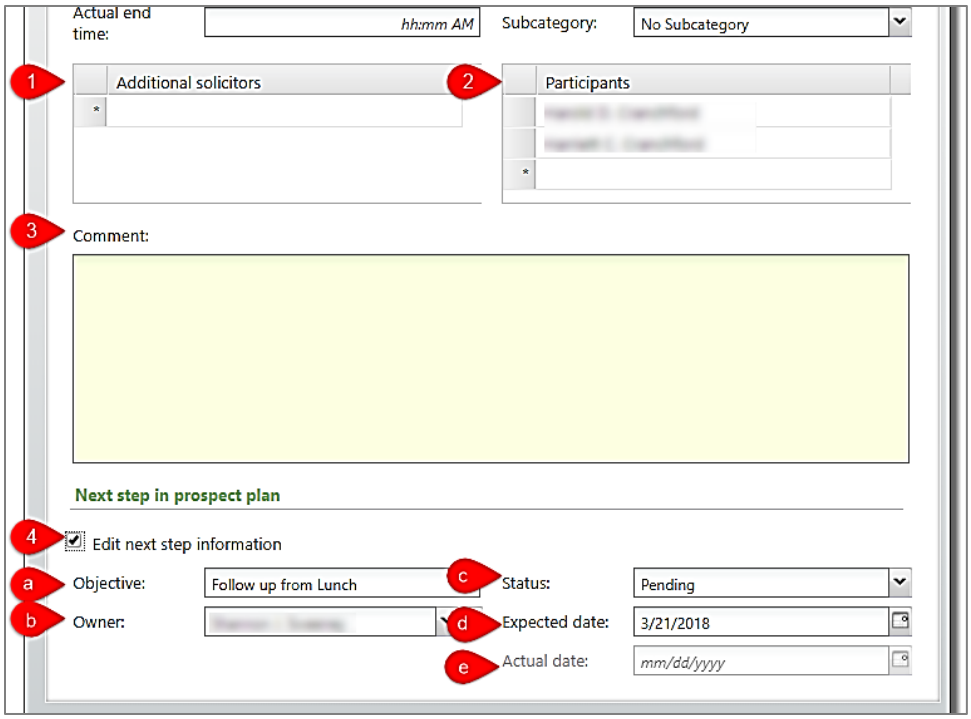
Complete the **File a contact report** window.



1. Edit the **Objective** if necessary.
2. The **Owner** field auto-populates with the name of the Primary Manager of the plan. Typically, only the Primary Manager or Secondary Solicitor should enter steps on a plan. While this is not a required field, without an owner the contact report does not display correctly and will not be reflected in performance-related reports.
3. Enter the **Actual date** the interaction occurred.
4. Optionally enter the **Actual start time**. This is not a required field.
5. Optionally enter the **Actual end time**. This is not a required field.
6. Update the **Stage** if necessary.
7. Update the **Contact Method** if necessary.
8. The **Category** should be set to Plan Step.
9. Select or change the **Subcategory** value as needed.

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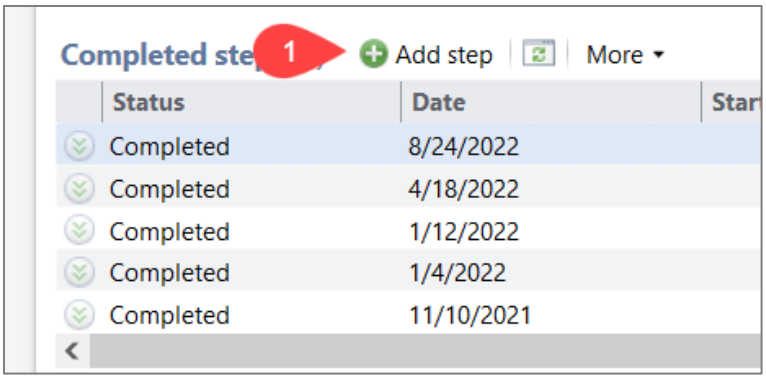


1. Add **Additional Solicitors** involved in the communication.
2. Add the constituent(s) as a **Participant**.
3. Complete the **Comment** field with all relevant details of the communication with the constituent. Use the contact report best practices noted earlier.
4. Tick the **Edit next step information** box if a next step exists and needs to be edited based on information from the contact report.
    a. Edit the **Objective** if necessary. This is a required field
    b. Edit the **Owner** field if necessary. While this is not a required field without an owner the contact report does not display correctly and will not be reflected in performance-related reports.
    c. Edit the **Status** if necessary. Options are Planned, Pending, and Completed. This is a required field.
    d. Edit the **Expected date** if necessary. This is a required field.
    e. If the Status is Completed the **Actual date** becomes a required field. Complete this field if necessary.

Add a Completed Step

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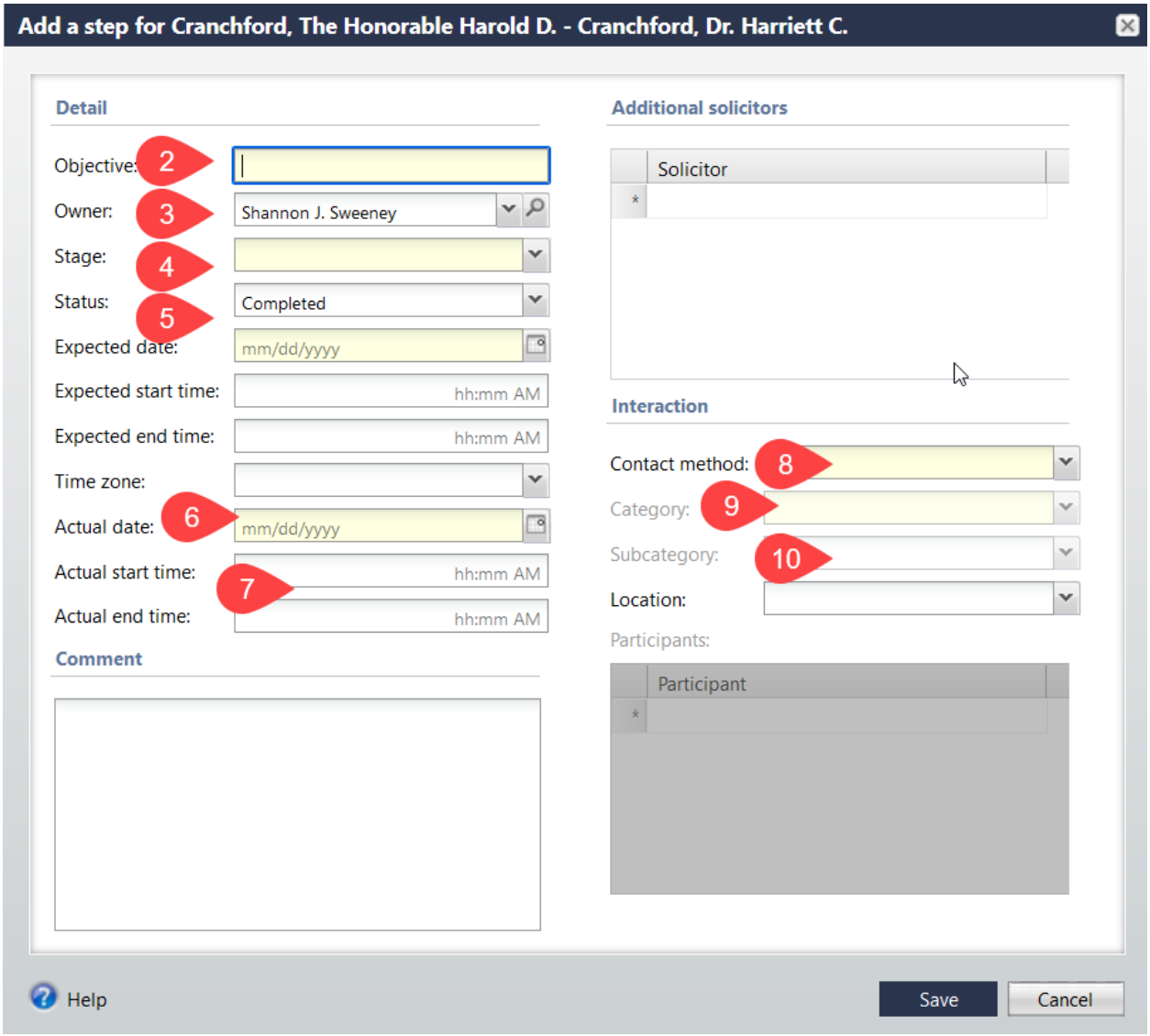


1. Click the **Add step** button in the Completed Steps section.
2. Add the **Objective**.
3. The **Owner** field auto-populates with the name of the Primary Manager on the plan. If you are a Secondary Solicitor, select your name from the dropdown menu. Typically, only the Primary Manager or Secondary Solicitor should enter steps on a plan. While this is not a required field, without an owner the contact report does not display correctly and will not be reflected in performance-related reports.
4. Select the appropriate **Stage** from the dropdown menu.

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5. The Status defaults to Completed.



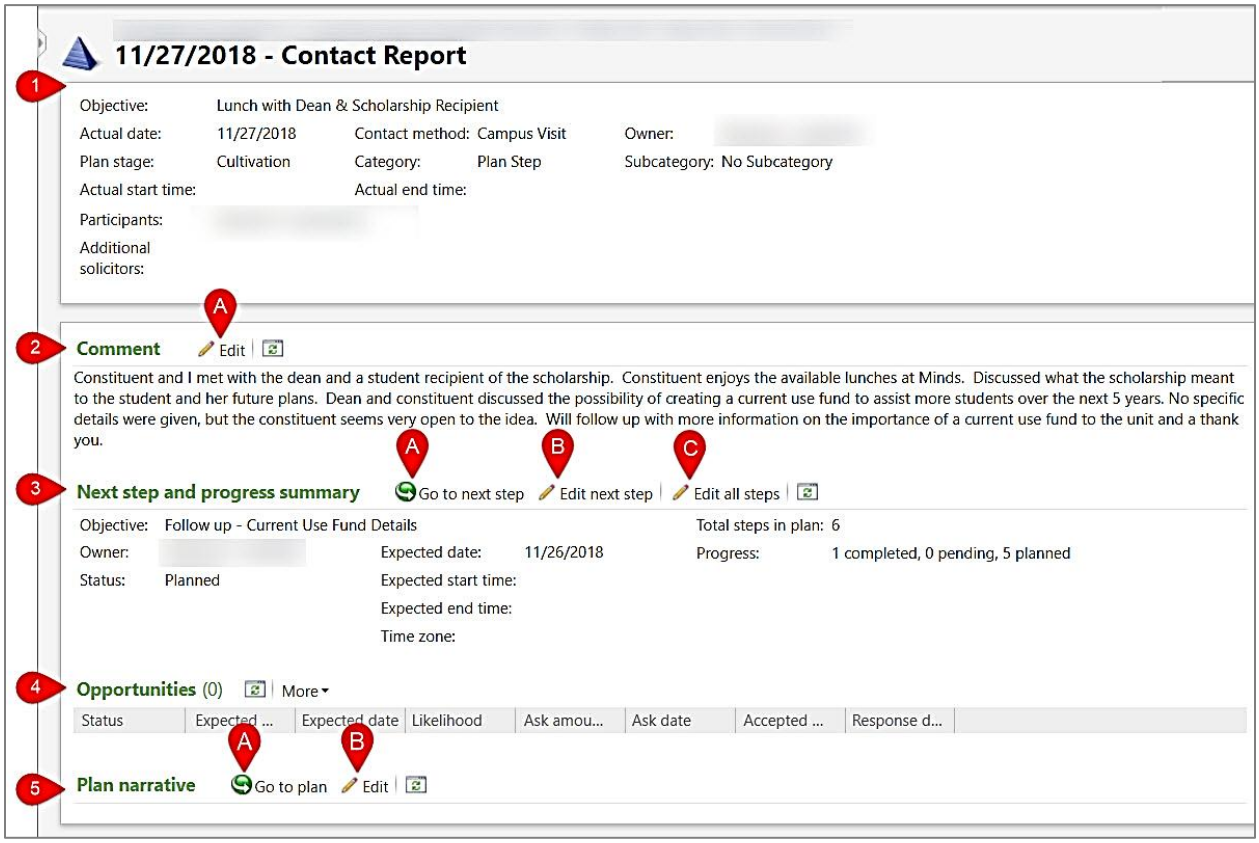
6. To auto-populate the **Expected date**, enter the date of the interaction in the **Actual date** field first.
7. Optionally enter the **Expected** and **Actual start time** and **end time**. These are not required fields.
8. Select the **Contact Method** from the dropdown menu.
9. Select the Plan Step **Category** from the dropdown menu.
10. Select the **Subcategory** from the dropdown menu. Refer to the Substantive Steps Job Aid for more information on which Subcategory to use.

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Reading the Contact Report Record

When viewing a prospect plan, you can view the content of a contact report by clicking the double chevron to the left of the plan step and select **Go to contact report**. This will display the contact report view, which shows details about the current contact report, a preview of the subsequent contact report, and some information about the plan opportunity.



1. The summary area of the contact report record contains details of the step the contact report is associated with.
2. The **Comment** section is the contact report.
    a. Select **Edit** to make changes to the details of the communication or the Comment.
3. The **Next step and progress summary** section contains details about the steps that are already associated with the plan.
    a. Select **Go to next step** to review the next step on the plan. This is specifically the step, not a Contact Report record.
    b. If your communication changes your strategy or required follow up, use the **Edit next step** option to edit the next step as appropriate.
    c. To make bulk edits to the planned steps of your strategy, select the **Edit all steps** option to open the plan step template window.
4. The **Opportunities** section will contain information for any opportunities associated with the plan. If there is no opportunity on the plan, nothing will display in this field.

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5. The **Plan narrative** section will display the plan narrative. If the contact report changes the direction of the plan, this can be a helpful tool to update the plan narrative with the new information.
    a. Selecting the **Go to plan** option takes you back to the Details tab of the Plan.
    b. If the communication detailed in the contact report changes the overall strategy for the plan, select **Edit** to update the narrative to communicate that update.

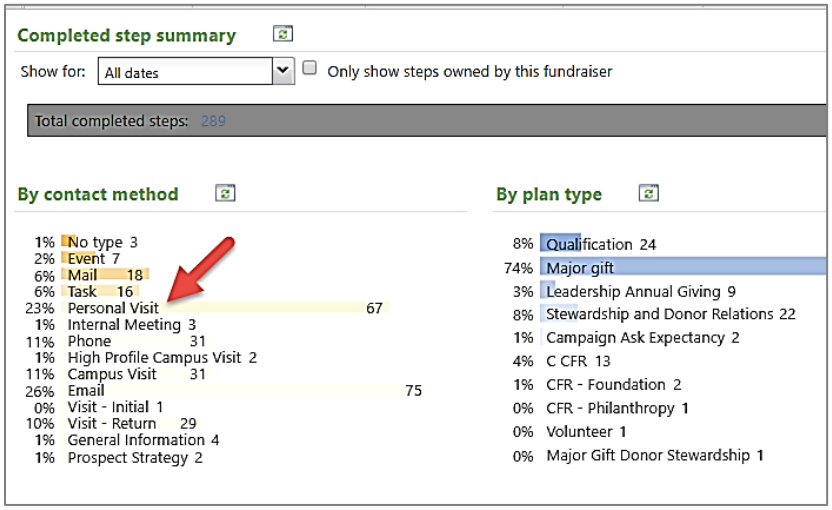
When viewing a prospect plan, you can also click the hyperlink displayed as the plan step's objective. Doing so will display the plan step view, which only shows information for the current contact report.

Finding a Contact Report

There are several areas that display contact report information.

Fundraiser Page

To see information on a specific fundraiser's contact reports (and not reports for a specific constituent), use the Fundraiser tab. The Completed Step Summary displays information on the contact method associated with the fundraiser's completed steps.



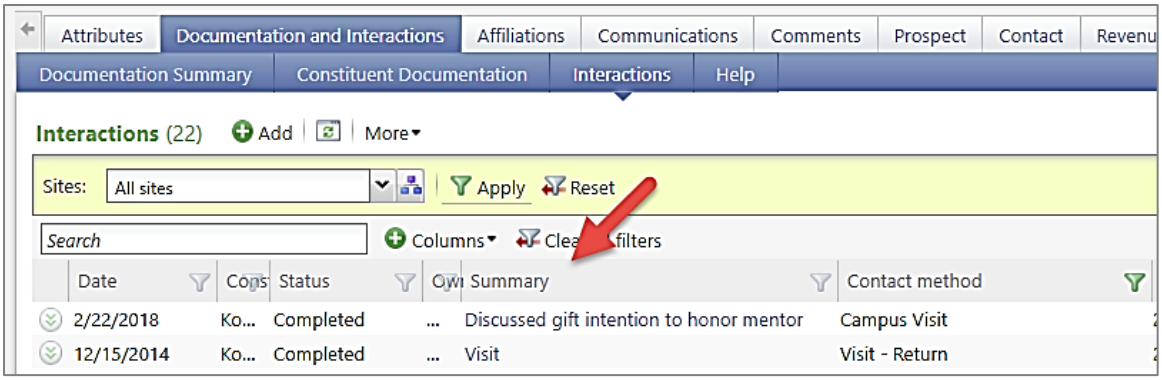
Choosing a contact method or plan type shows the underlying data. Use the hyperlink displayed in the Objective column to open the plan step and review the contact report details in the Comment field.

Constituent Record

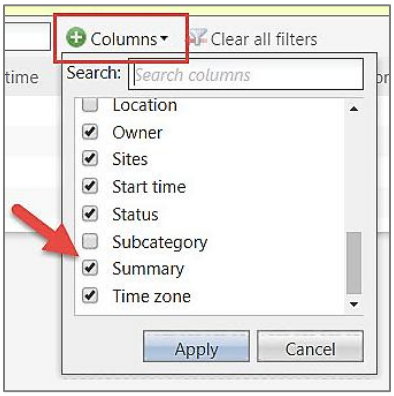
For information on a specific constituent's contact reports and interactions, view the Interactions sub-tab on the Documentation and Interactions sub-tab of the constituent's household record.

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Click the hyperlink in the Summary column in any of the displayed rows to open the contact report. (If the Summary column does not display, click the Columns button and tick the checkbox next to Summary.)



Filtering the Contact method column can narrow down results to specific contact types. To filter the Contact method column, select the funnel in the column header and apply the contact type that should display.

UPDATED 12/12/24

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THE OPPORTUNITY

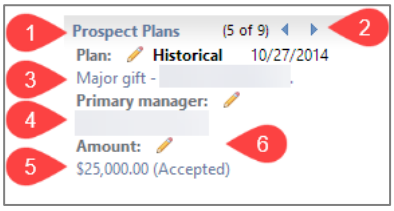
TRACKING THE DETAILS OF AN ASK

In TED, **Opportunities** are a systematic way of capturing details of an ask: when does the fundraiser anticipate making the ask, when was an ask made, how much was asked for, and what the constituent agreed to regarding a gift. Information from opportunities feeds into pipeline reporting. It is important to note that information must be added to the opportunity correctly for it to appear in the fundraiser's metrics and the Active Pipeline Report Any information added to the opportunity incorrectly or incompletely will appear on the fundraiser's Attention | Opportunities tab on their Fundraiser page.

Viewing the Opportunity

From the Prospect Plans Summary Tile

Both individual and household records display a Prospect Plans summary tile. This summary tile displays active and historical prospect plans regardless of whether they also have opportunities.



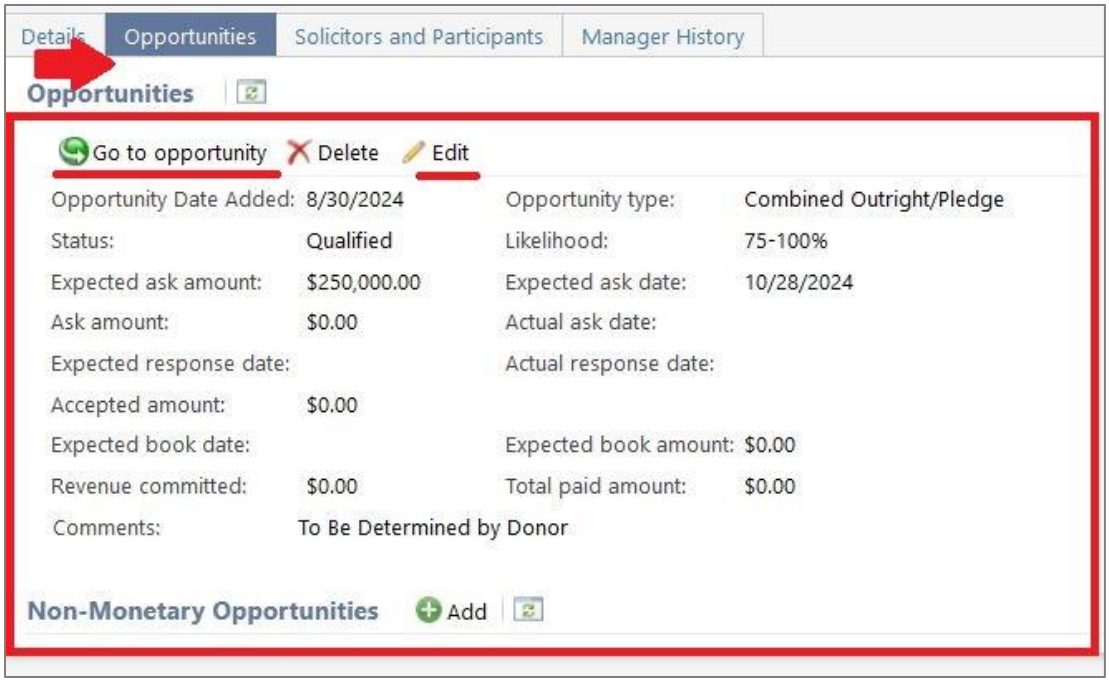
1. The hyperlinked amount in the **Prospect Plans** summary tile opens the opportunity record associated with the plan that is currently displayed.
2. Use the **arrows** to navigate through all active and historical plans.
3. To open a plan record, click the hyperlinked **Plan** name.
4. To open the primary manager's Fundraiser sub-tab, click their hyperlinked name.
5. The **Amount** field will update as the opportunity is updated. If there is no active opportunity on the plan, this field will display No Opportunities.
6. Active opportunities will display a pencil icon for editing. Clicking the pencil will open the Edit Opportunity window to make changes to the opportunity.

From the Opportunities tab of the plan

This view shows some details of the opportunity and includes a button to link to the full opportunity record.

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1. The **Go to opportunity** button will open the opportunity record. The opportunity record contains all the details for the opportunity, including any associated revenue.
2. Opportunities should be edited as often as necessary to reflect the latest information gained from the donor engagement process. Use the Edit option to make changes to the opportunity.
3. The summary section of the opportunities tab contains some basic information about the plan.

Reading the Opportunity Record

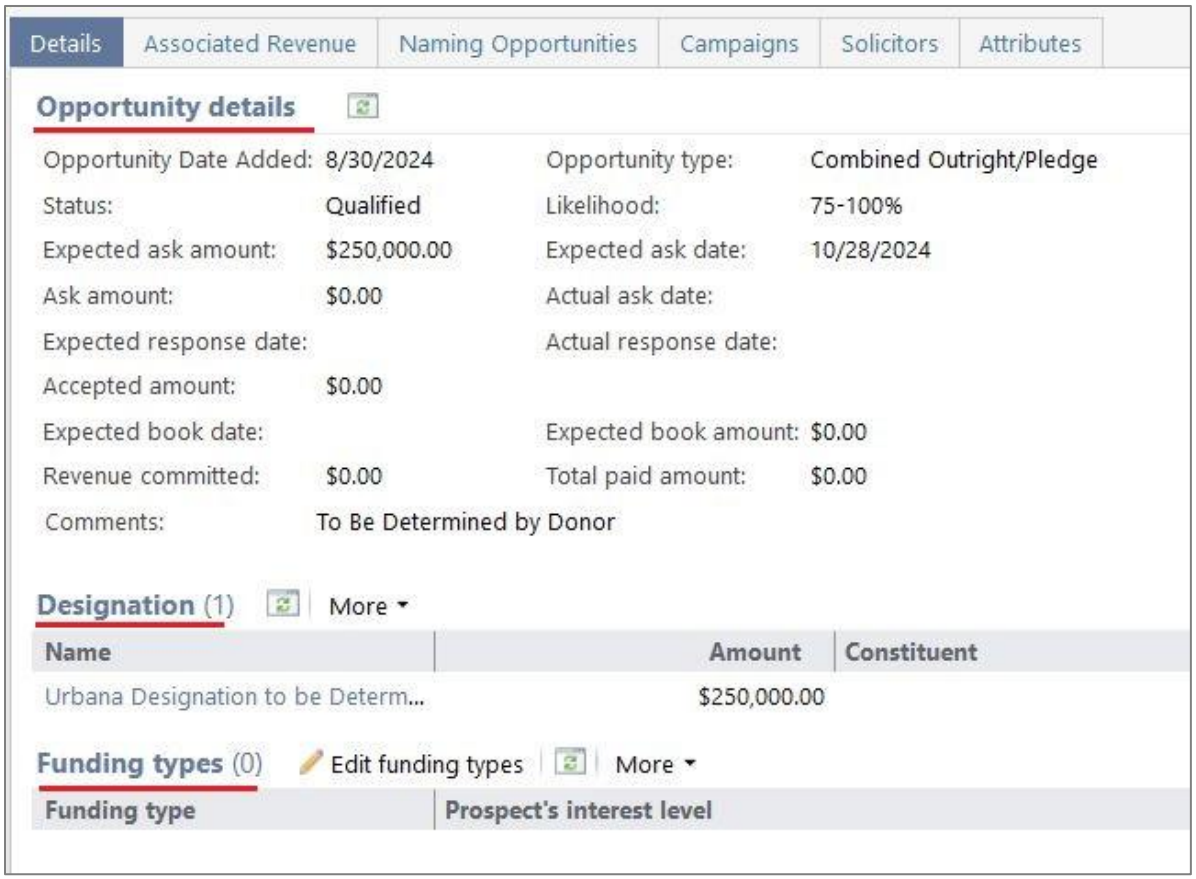
The opportunity record contains all information about the opportunity, some of which is not displayed in the Prospect Plans summary tile or the **Plans > Opportunities** tab. The full opportunity record displays details for Associated Revenue, Naming Opportunities, Campaigns, and Attributes.



1. The **summary section** of the Opportunity contains some details of the plan, like the prospect team and plan stage, as well as pipeline information, such as Expected Book Amount and Date.
2. The **Details** tab contains the working details of the solicitation.
3. The **Associated Revenue** tab contains information on any revenue that has been associated to the opportunity.
4. The **Naming Opportunities** tab displays any naming opportunities associated with the gift.
5. The **Campaigns** tab displays the name of the campaign the gift has been associated with.
6. The **Attributes** tab has any related features attributed to the gift.

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Details Tab

The Details tab is one the two most frequently used opportunity tabs. The Details tab contains all the active information about the opportunity.

1. **Opportunity details** contains information added to the opportunity by the gift officer.
2. The **Designation** is the fund that the solicitation is being made for. The designation must be included any time an Opportunity is created.
3. **Funding Types** section is not in use currently.

Associated Revenue Tab

The Associated Revenue tab displays any revenue that has been associated to the plan.

1. The **Associated Revenue** section displays revenue that has been associated to the opportunity. This includes single donations or payments from a third party, such as the constituent's business. If a gift is made as a pledge, the original



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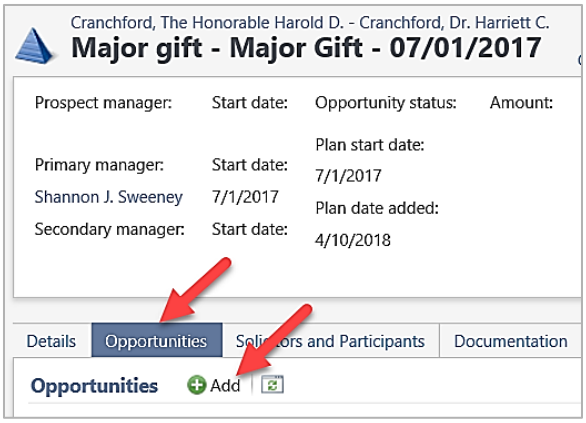
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transaction for the full gift amount may have revenue associated with it, but future pledge payments will not. This is to ensure that the same revenue is not double counted.

2. When a planned gift becomes linked to the opportunity, it will display in the **Linked Planned Gifts** section.

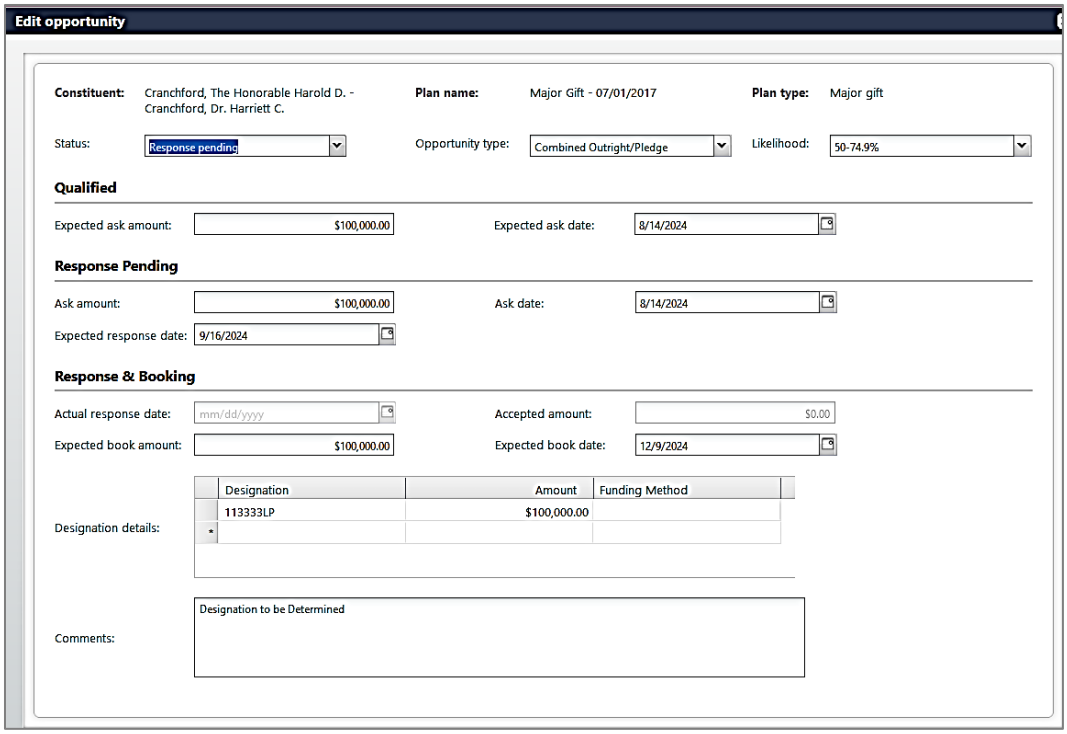
Creating an Opportunity on a Plan

Begin on the plan. Open the **Opportunities** tab of the plan and click the **Add** button to open the **Add Opportunity** window.



The opportunity should be added and edited anytime there is progress made towards the ask.

1. **Reading the Smart Form:**



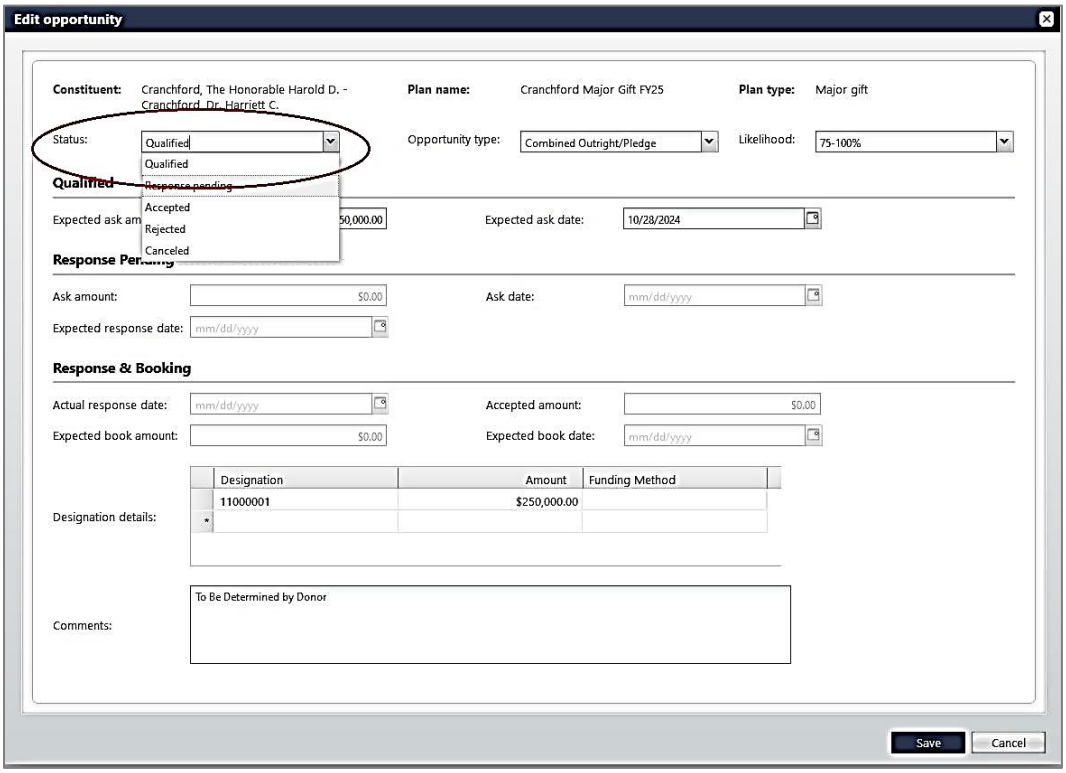
a. The top section includes the Constituent, which is the Household or Organization Name. Next is the Plan Name and Plan Type.

b. The **Opportunity Status** identifies the stage of the gift cycle. Choose as appropriate for the stage of the ask. **You will edit this field as the opportunity progresses through stages. Updating the opportunity status will prompt the form to update per the opportunity stage and indicate to the gift officer which fields are mandatory to be completed.** For a list of status definitions, see Section 2 below.

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c. The **Opportunity Type** indicates the type of gift being discussed. The Opportunity Types are defined in Section 3 below.
d. **Likelihood** reflects how likely the fundraiser feels the ask will be accepted by the prospect. Choose a value from the drop-down list. This field is required for UIUC gift officers.



2. Opportunity Status Definitions: (Select from one of the following depending on where you are in the ask cycle)

a. **Qualified** is used when the prospect has been qualified, but the ask has not yet been made.
b. **Response pending** is used once the solicitation has been made. The opportunity remains in this status until the constituent accepts or rejects the solicitation
c. **Accepted** is used when the constituent agrees to give a gift or otherwise indicates they want to continue the conversation around funding the proposal.
d. **Rejected** is used when the constituent declines an ask. Once a solicitation has been rejected, and if the fundraiser does not think the conversation can be reset for a new ask, an appropriate QNP code should be added to the plan and the plan should be made historical.

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Note: if a gift officer writes over the rejected opportunity to make a new ask at a later date using the same plan, they won't get credit for making the original ask.

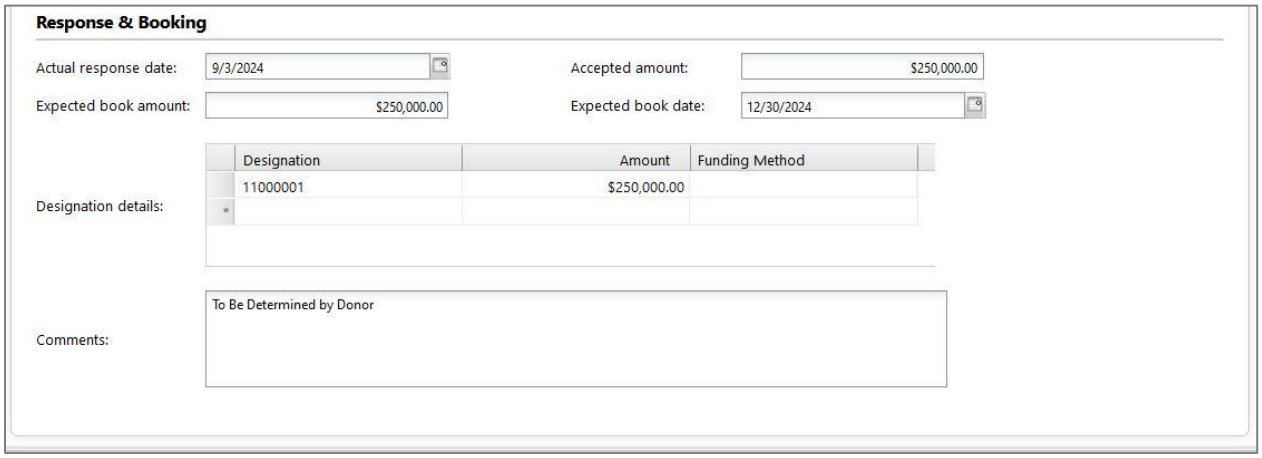
e. **Canceled** is used when the advancement officer decides that they no longer plan to solicit the prospect. Only a qualified ask can be canceled. Once a solicitation has been canceled, and if the plan's objective has been abandoned, any pertinent details should be added to the plan and the plan should be made historical.

Note: If an opportunity was added before enough details were available to determine an expected ask amount, and the gift officer will continue to have conversations toward a gift, the RPM PDA assigned to the unit can delete the opportunity. The gift officer can add a new opportunity when they are getting closer to making the ask.

3. The **Opportunity type** indicates the type of gift being discussed.
    a. **Combined Outright/Pledge** is used when the prospect gives a lump sum towards an overall gift and indicates they will give the rest over an established amount of time. It is important to note that any pledges must be booked in TED by the UIF Gift Administration team.
    b. **Contract** is used to indicate that the gift is being given based on terms defined by contract between the University of Illinois System and the prospect.
    c. **Founders' Pledge** is a nonbinding commitment from any Illini founder, owner, innovator, investor, and/or early employee to make a future gift to Illinois reflective of their success and the success of their venture.
    d. **Grant** is used to indicate the gift is being given through a grant to the University of Illinois System.
    e. **Irrevocable Deferred** is used to indicate that the gift will come later, most likely after the prospect has passed and that the prospect has completed any legal documentation to confirm the terms of the gift.
    f. **Non-Monetary** is used to indicate any physical gift, outside of cash, such as farm equipment.
    g. **Outright** is used to indicate that the gift is a one-time gift received in total.
    h. **Pledge** is used to indicate that the prospect will be making payments to fulfill an agreed-upon gift amount over an established period. It is important to note any pledges must be booked in TED by the UIF Gift Administration team.
    i. **Revocable Deferred** is used to indicate that the gift will come in after the prospect has passed, but that the prospect reserves the right to change their mind about the commitment during their lifetime.
    j. **To Be Determined** is used to indicate that the prospect has not chosen the method of payment on the gift.

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4. The **Expected ask amount** is the amount a fundraiser expects to ask the prospect for.
5. The **Expected ask date** is the date the fundraiser expects to make the solicitation. This date should be today or in the future until the ask has been made. By policy, each plan type has a time constraint for when the solicitation must take place.
6. The **Ask amount** is the actual amount a fundraiser asks for. This field is only available when the opportunity status is set to Response Pending, Accepted or Rejected. This field does not have to match the Expected ask amount.
7. The **Ask date** is the actual date the solicitation was made. This is never future dated.
8. **The Expected response date** is when the fundraiser expects to receive an answer from the prospect.
9. The **Actual Response date** is the actual date the ask has been verbally accepted or rejected by the prospect. Until either of these actions occur, this field should be left blank.
10. The **Accepted amount** is the amount that the prospect agrees to give when accepting the ask.
11. **Expected Book Amount** is the amount the fundraiser expects the prospect to send in.
12. **Expected Book Date** is the date that this gift is expected to be fully documented in TED. This will be the same date that you would expect to see the transaction for this gift commitment appear on the UI Household Giving sub-tab. This information is useful for forecasting, especially when it is known that the gift will not be fully documented until much later than when it was verbally accepted. This field should be updated each time more information is gathered about the opportunity.

1. The **Designation** area contains information pertaining to the gift and how it is to be distributed.
    a. The **Designation** is the fund the solicited gift will apply to. Designation information is required on any open ask. If the constituent has not selected a designation, or a new fund has not been created yet, use the “To Be Determined by Donor” designation for the unit you expect will benefit from the gift. **No opportunities should ever have designations that start with a 4, E, N, U, P, or an asterisk (*).**

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Note: To search for the "To Be Determined" designation for your unit, click on the magnifying glass and type "to be" in the Search field, then scroll down to find your unit.

b. Add the **Amount** of the gift being designated. If there are multiple designations selected, the total amount of the solicitation should be divided between the designations per the prospect's request. This is a required field once the designation has been selected.
c. Choose the appropriate **Funding Method** from the drop-down list or choose To Be Determined if it has not been determined yet. This is not a required field.

2. **Comments** can contain any additional information the fundraiser would like to add about the specific opportunity. This information can be helpful when associating revenue.
3. Click **Save** after any edits to the opportunity.

Updating an Opportunity

Update the opportunity whenever new data is discovered during the cultivation, solicitation, and closure process.

From the Prospect Plans Summary tile

In the Prospect Plans summary tile, use the arrows to display the plan opportunity that you want to edit. Click the pencil icon to open the Edit Opportunity window to make changes.

From the Plan Record

To edit an opportunity, click the **Edit** button on the Opportunities tab on the plan record to open the Edit Opportunity window. Edit as necessary and save your changes.

Associating Revenue with Opportunities

To associate revenue to a plan, use the Gift Transmittal Form when the gift is received. This can be accessed from the UIF Help drop down menu in TED. This form allows UIF Gift Processing to associate the revenue from the gift to the corresponding opportunity.

UPDATED – 10/9/24

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ASSOCIATING REVENUE TO PLAN OPPORTUNITIES

LINKING REVENUE TO PLANS

Revenue association allows fundraisers to receive credit for their work by linking a revenue transaction in TED with a fundraiser's opportunity on their prospect plan.

Outlined below is how to:

- Request revenue association in conjunction with a Gift Transmittal request
- Review plan opportunities for associated revenue
- Request revenue association after the gift transaction has been processed

Request Revenue Association with Gift Transmittals

Gifts and non-gifts should be submitted promptly once received.

Revenue association for **Cash, Check, Gift in Kind, and Credit Cards** transactions can all be requested via a Gift Transmittal request. Fill out the appropriate Gift Transmittal form based on the type of gift that has been received. Include all documentation associated with the gift.

When a donor has **pledged** to donate a specific amount over a length of time, complete the Notice of Pledge Form to ensure the pledge is booked correctly in TED.

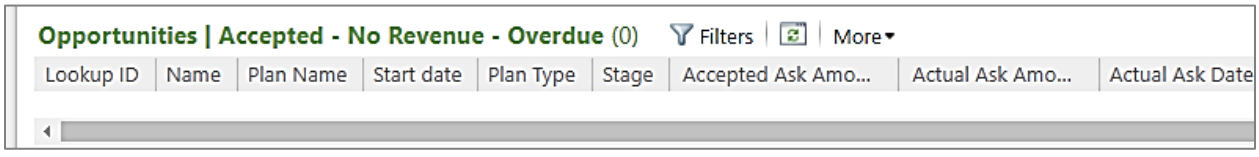
When a donor is participating in the **gift planning** process and would like to complete the necessary documentation, complete the Gift Planning Gift Documentation Request form.

Each of these processes can be considered the first step in associating revenue to an opportunity. Once the request has been made, it will take a minimum of two weeks for the request to be completed. Once this time elapses, the gift officer should review whether the revenue has been associated.

Reviewing Opportunities for Associated Revenue

There are several ways to review associated revenue.

From the Fundraiser Page



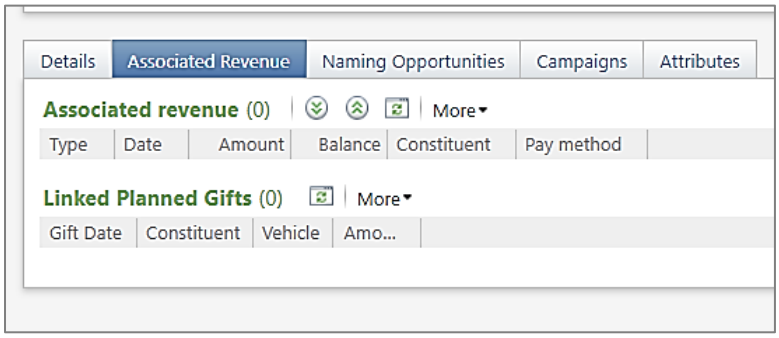
The Attention | Opportunities tab on the Fundraiser page contains a section titled **Opportunities | Accepted – No Revenue – Overdue**. This section will display any opportunity that has been accepted but has no associated revenue. Review this section regularly to determine if you need to file a request to associate revenue.

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On the Opportunity Record

The **Associated Revenue** tab is found on the opportunity record. Any revenue that has been associated, including pledge payments, will be displayed here.



After submitting the appropriate gift transmittal, Notice of Pledge, or Gift Documentation Request form, the revenue should be associated within two weeks *if all necessary information was available*.

Get Revenue Associated

Understanding the required information and the limits to associating revenue may assist the fundraiser in appropriately requesting revenue association.

Required information on Opportunities

For an opportunity to be linked to revenue:

1. The gift must be received and appear in the Revenue area of the TED record
2. The associated plan must have a site and plan participants
3. The Opportunity status must be “Accepted”
4. The Opportunity must contain:
    a. A designation
    b. Amount being applied to each designation

Associating Revenue for Planned Gifts

Revenue (the commitment for the planned gift) is associated to a plan opportunity by UIF Trust Services when the proper documentation for the revocable commitment from the unit/donor is received. The UIF Gift Planning Advisor or a member of UIF Trust Services completes a “Notice of deferred gift commitment” form, enters the planned gift into TED, and associates the commitment for the Planned Gift revenue to the opportunity.

Limits of Associated Revenue

There are several limitations to revenue association that are important to understand:

- Before revenue can be associated to an opportunity, the revenue must be committed in TED.
- The revenue from a gift transaction can only be associated with a single plan.
- Also be aware that due to either policy considerations and/or technical considerations, the following revenue types cannot be associated to opportunities in TED:
    - **Individual payments for pledges** – Revenue must be associated to the full pledge commitment. You cannot link separate payments to an opportunity; you must link the full commitment, which will apply the payments as received.

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- **Matching gift claim** – The promise of a matching gift, added when a donor applies for a matching gift from their company, cannot be associated.
- **Matching gifts** - The money that comes from the company and for which the donor receives matching recognition credit cannot be associated.
- **Recurring commitment** – The entry, like a pledge, which outlines the commitment the donor has made to give, by credit card over a period, or routinely (recurring) on a schedule cannot be associated.
- **Recurring gifts** – The money that is paid toward a recurring commitment cannot be associated. (UIF only has credit card recurring commitments/gifts.)

- Due to policy considerations, the following plan configurations cannot receive associated revenue:
  - **Plans with no steps** – If a plan associated with the opportunity does not have any steps, revenue cannot be associated.
  - **Plan was added after the revenue was received** – If the plan added date is *after* the date the revenue was received, revenue cannot be associated.

Associating Revenue After Gift Processing

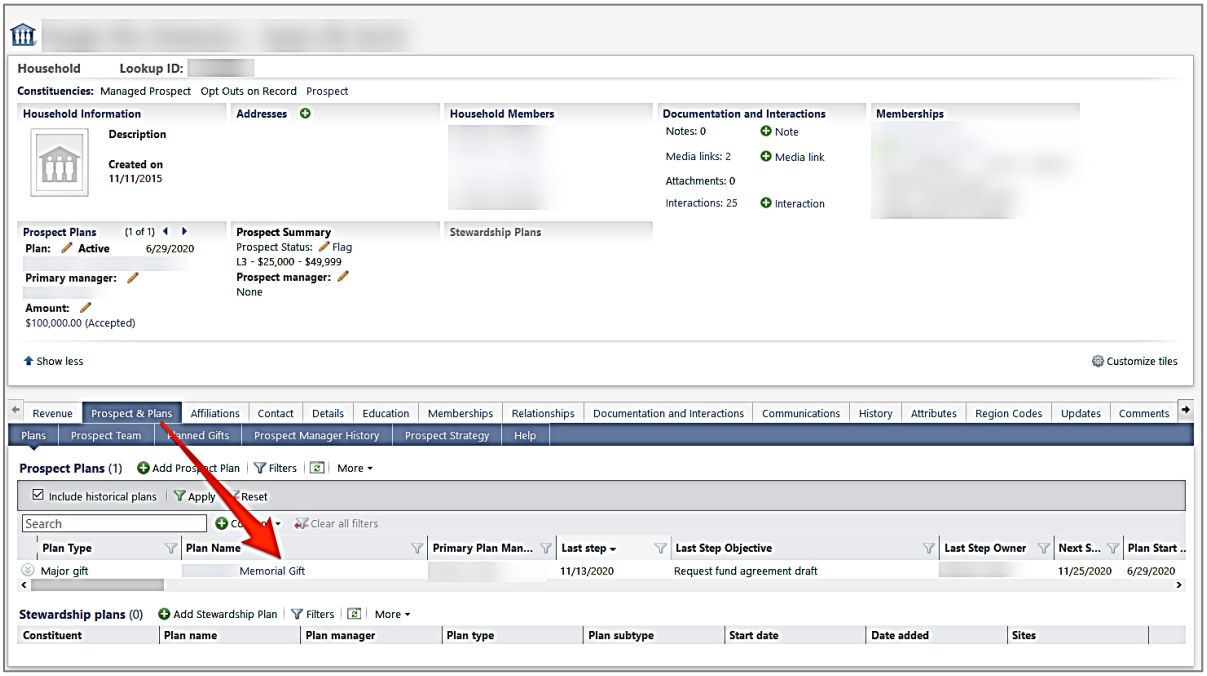
Sometimes revenue cannot be associated at the same time the gift was processed. If it has been more than two weeks since a gift was processed (meaning added to TED), a fundraiser can request revenue association by filing a Research Request with UIF Research and Portfolio Management.

To submit the request, you will need the plan name, the revenue ID for the gift transaction, and the gift amount.

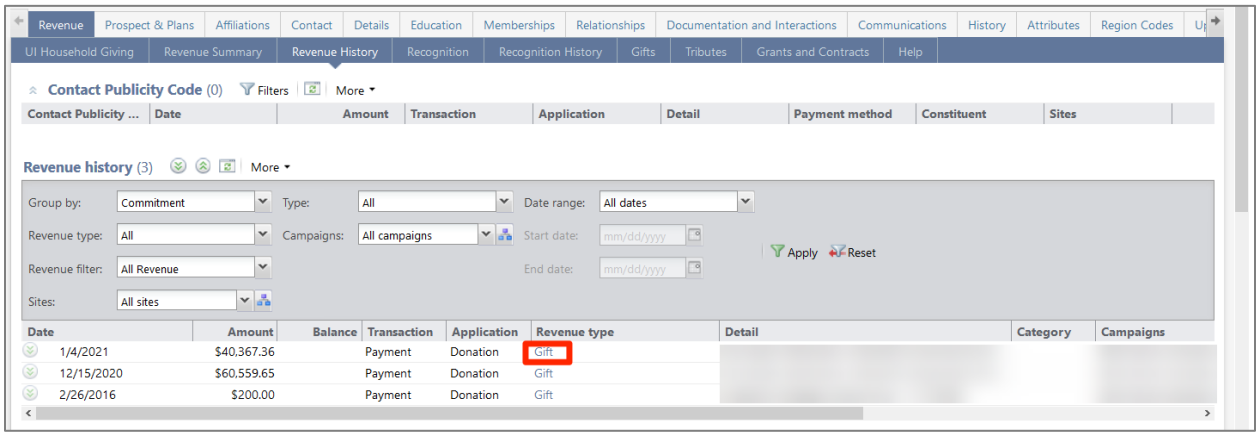
Plan Name:	My Plan
Revenue ID:	rev-12345678
Gift Amount:	$50,000

1. Navigate to the household or organization record of the donor and go to **Prospect & Plans > Plans** to find the plan name.

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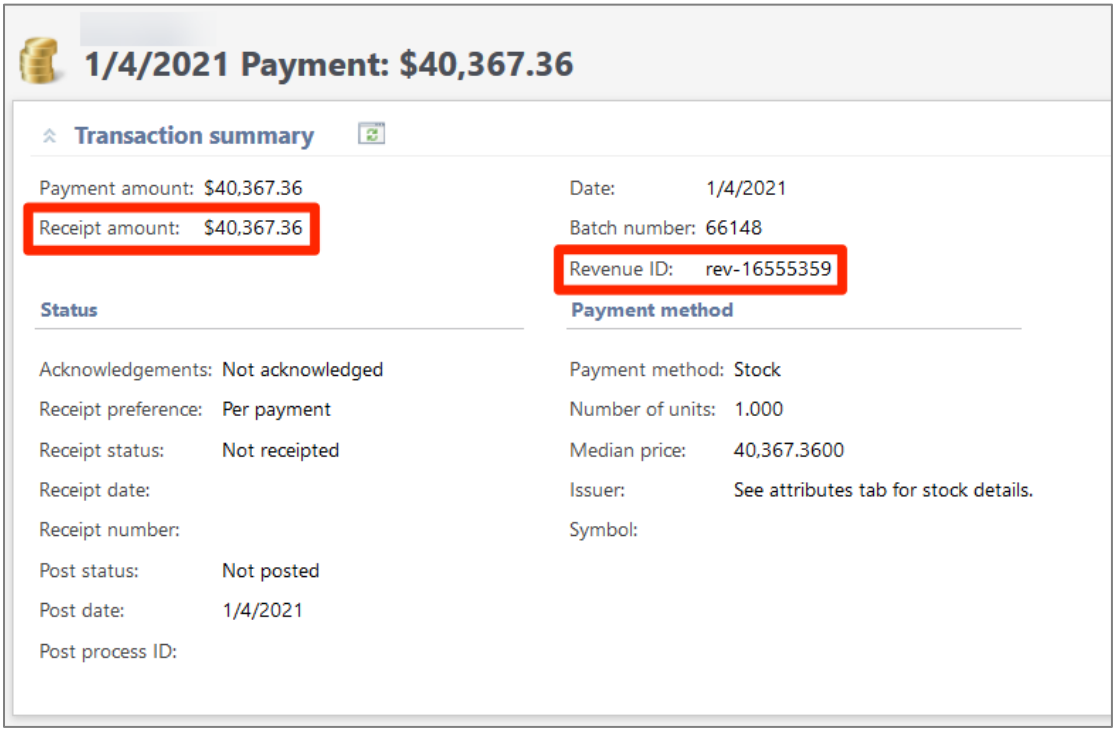


2. Next, you will need to find the revenue transaction and amount for the gift. The easiest way to do this is to stay on the current record and move to the **Revenue** tab, and then select **Revenue History**. From here, you can filter by transaction types to locate the appropriate gift. You can click the hyperlink in the Revenue Type column to open the gift transaction. In the transaction summary at the top of the screen, the revenue ID is displayed in the form *rev-12345678*. The gift amount may be the receipt amount, or it may be different if the revenue transaction includes multiple designations.



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3. Navigate back to the household or organization record by clicking the back button in your browser. **The Research Requests area of TED does not accept household IDs.** If you are submitting a request for an organization, please move on to the next step. If you are submitting a request for an individual, then navigate to the constituent record for one of the household members.
4. Navigate to **Prospect & Plans > Prospect Research History**, and then click **Add Research Request**.
5. In the pop-up window, fill out these fields:
    a. Prospects to Research: This will automatically be filled in.
    b. Priority: Select a value.
    c. Research type: Select **Revenue Association**.
    d. Request reason: Select **Plan Closure**.
    e. In the Notes field, please include the information you collected in the table above, e.g.
        i. Plan Name: My Plan
        ii. Revenue Transaction ID: rev-12345678
        iii. Gift Amount: $50,000

Incorrectly Assigned Revenue

If you believe that revenue has been incorrectly associated to an opportunity, contact your supervisor, your Prospect Development Analyst in UIF Research & Portfolio Management, and the plan manager for the plan with the associated revenue.

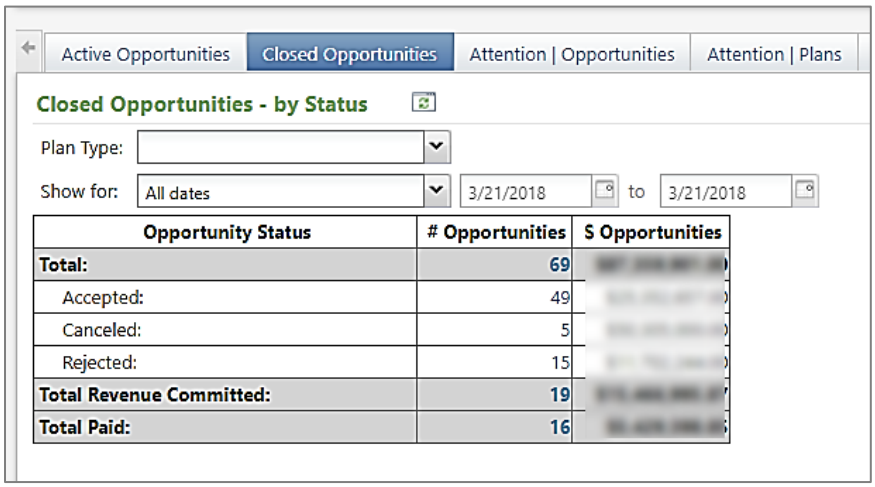
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Reviewing Total Associated Revenue

The Closed Opportunities tab of the Fundraiser page displays all revenue associated to opportunities.

Clicking the hyperlinks in the Total Revenue Committed row will display opportunities and plans that have been linked through associated revenue.



Opportunity Status	# Opportunities	$ Opportunities
Total:	69	[illegible]
Accepted:	49	[illegible]
Canceled:	5	[illegible]
Rejected:	15	[illegible]
Total Revenue Committed:	19	[illegible]
Total Paid:	16	[illegible]

UPDATED 2/18/2025

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CLOSING A PROSPECT PLAN

ALL PLANS COME TO AN END

When the work is done, it's important to ensure that prospect plans are closed and made historical correctly. A prospect plan can end for a multitude of reasons. Here are a few examples:

- **Qualification** plans are closed when it is determined the constituent is not a viable prospect for the unit, is not ready to make a gift at this time or is not a prospect for other reasons. By policy, qualification plans must be completed within one year.
- **Major Gift** plans are closed when no further work to cultivate, solicit, or steward a donor is needed, or if the primary plan manager abandons the plan due to a change in the prospect's circumstances or interest.
- **Leadership Annual Giving** plans are closed once the prospect accepts the solicitation and revenue is associated, or the prospect rejects the solicitation.

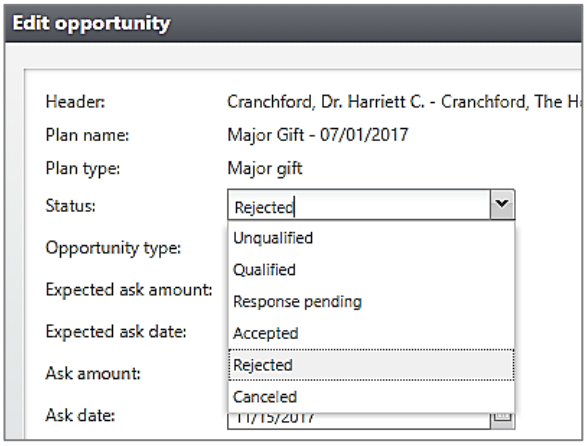
Prospect Plans with Steps

A prospect plan can only be made historical if there are no pending steps. Pending steps should be completed or deleted. Steps that will never be performed are deleted. All other steps should be updated with appropriate information and marked as completed.

Prospect Plans with Opportunities

A prospect plan with an accepted opportunity should have associated revenue prior to being marked historical.

A prospect plan with a rejected or canceled opportunity should be made historical with the appropriate status selected and a completed step entered with a summary of the circumstances. Opportunities that are changed back to Qualified to be repurposed will not be counted.



When to Make the Prospect Plan Historical

A **Qualification** plan should be made historical when any one of the following *Qualified, Not a Prospect (QNP)* determinations have been made:

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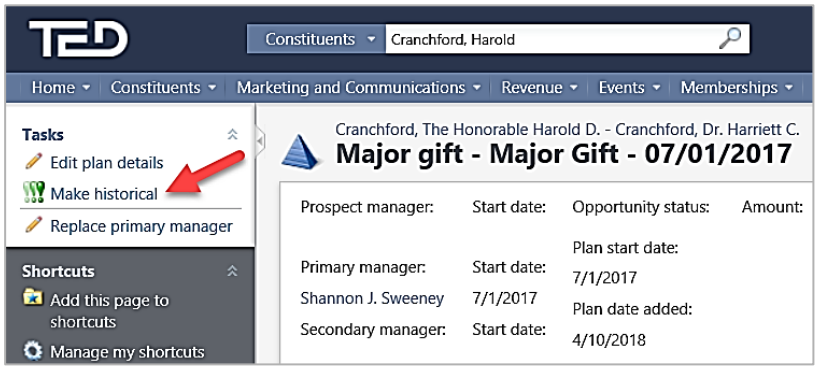
- **Qualified, Not a Prospect | Not at this Level:** The gift officer has determined that the prospect does not have the capacity to make a gift within the Prospect Plan type range.
- **Qualified, Not a Prospect | Not at this Time:** The gift officer has determined that the prospect does not have the capacity to make a gift within the next two years. If the prospect indicates a better time for them to give, the gift officer should note that in the plan step.
- **Qualified, Not a Prospect | Not for this Unit:** The gift officer has determined that the prospect is not interested in making a gift to a particular unit. If the prospect indicates a unit, initiative, or purpose that is better aligned to their philanthropic priorities, the gift officer should note that in the plan step and notify the appropriate gift officer who will follow up.
- **Qualified, Not a Prospect | Unresponsive:** After multiple Attempted – Not Reached plan steps have been documented using the 3x2x2 method (three attempts to contact using two different methods over two cycles), a gift officer may disqualify the prospect as unresponsive.
- **Qualified, Not a Prospect | Other:** Used when a gift officer determines a prospect will not make a gift and no other QNP category fits.

A **Major Gift** or **Leadership Annual Giving** plan is made historical when one of the following determinations have been made.

1. The constituent has accepted the gift, and no stewardship is needed beyond tasks that can be managed in the "Stewardship plans" area of the Plans tab.
2. The fundraiser has marked the opportunity as Rejected or Canceled.

Making the Prospect Plan Historical

Once all pending steps have been addressed and any necessary updates have been made to the opportunity, the prospect plan can be made historical.



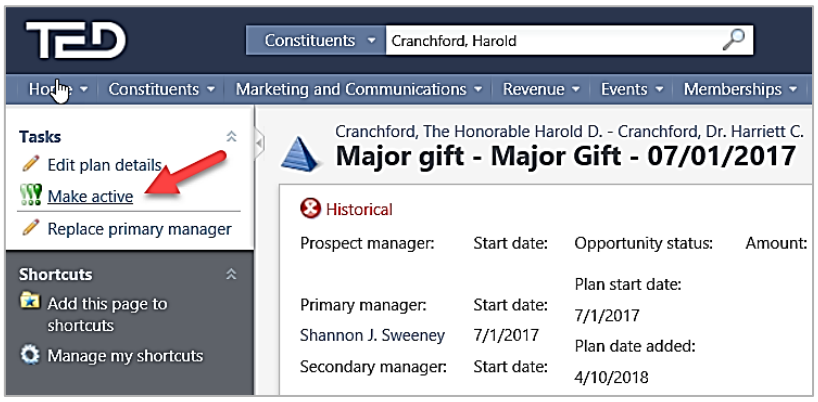
1. Begin on the prospect plan record.
2. Select the **Make historical** action from the Tasks menu in the left sidebar.
3. A confirmation window will open; select **Yes**.

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Making a Prospect Plan Active

If a prospect plan is made historical accidentally, it can be made active again.



1. Begin on the prospect plan record.
2. Select the **Make active** action from the Tasks menu in the left sidebar.
3. A confirmation window will open; select **Yes**.

Prospect plans should not be reactivated for a new gift conversation, as opportunities that are repurposed will not be counted.

Deleting Prospect Plans

A prospect plan that was added to a record by mistake can be deleted. The UIF Research and Portfolio Management and Advancement Services teams can delete prospect plans if needed.

To request the deletion of a prospect plan, contact UIF Research and Portfolio Management via a Research Request.

When making the request:

1. Use the Research Type of Other.
2. Include the following information:
    a. Constituent lookup ID
    b. Constituent name
    c. Exact name of the prospect plan
    d. Start date of the prospect plan.

It is important to note that once a prospect plan has been deleted, it cannot be retrieved. Be sure to review the prospect plan before requesting its deletion.

UPDATED 12/06/24

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PORTFOLIO TRANSFERS

WHEN PLANS NEED TO MOVE

A portfolio transfer happens when a gift officer leaves their position. The transfer involves determining whether plans are still viable and where they should be housed until a replacement is hired. **All changes to plan assignments, including the Primary Manager, Secondary Solicitor, Prospect Manager, and Step Owner will be completed by UIF Research and Portfolio Management (RPM).** The RPM Prospect Data Analyst (PDA) assigned to that unit will discuss recommendations with the departing gift officer (if possible), their supervisor, and advancement leadership in conjunction with portfolio management policies and procedures prior to completing the transfer.

Types of Portfolio Transfers

Gift Officer Leaving Illinois Advancement

When a gift officer is leaving the University of Illinois or moving to a role within an institution that no longer includes portfolio management, their viable prospects need to be transferred to another gift officer. Until the replacement is determined, the portfolio will remain assigned to the departing officer.

Gift Officer Moving to a New Role in Illinois Advancement

When a gift officer is moving to another unit within advancement, their portfolio will need to be transferred before they move to the new unit. These prospects will be moved to the appropriate Referrals record with indicators referencing the originating gift officer until a replacement is hired.

Portfolio Transfer Processes

Advancement Leadership Involvement

Before a portfolio review session is scheduled, the PDA will first communicate with the Chief Advancement Officer to determine which staff should be included in the review session.

Preliminary Portfolio Review for Next Actions

The PDA will download the outgoing gift officer's portfolio from TED, add recommendations for each plan based on the stage of the gift discussion, and share the spreadsheet with the outgoing gift officer in advance of the portfolio review session.

Portfolio Review Session

After the CAO has made decisions regarding staff involvement in a portfolio transfer, the PDA will initiate a meeting with the departing gift officer, the Chief Advancement Officer (CAO), and the Associate Vice Chancellor (AVC), if necessary. Decisions about the transfer of the portfolio and the next steps taken on plans are a collaborative effort between the outgoing gift officer, CAO, and PDA.

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Notification to Gift Officers / Units Inheriting Prospects

When the portfolio review process reveals prospects who should be transferred to other units, the PDA will contact the appropriate gift officer and/or CAO to discuss the next steps and/or assignment.

Portfolio Transfer

The PDA will make all changes in TED to transfer the portfolio unless otherwise indicated by Advancement staff. This includes changing or end-dating assignments, making plans historical, and creating new qualification plans where necessary. Ideally, the PDA should make all changes within 10 business days of the outgoing officer's departure if a meeting with all parties can be coordinated at that time.

Conflict Resolution

Conflicts about decisions or outcomes of these policies will be escalated to the next level leadership (i.e., senior advancement officer, Associate Vice Chancellor, Vice Chancellor, University of Illinois Foundation President) until resolved.

UPDATED -02/18/2025

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PROSPECT MANAGEMENT FREQUENTLY ASKED QUESTIONS

FREQUENTLY ASKED QUESTIONS RELATED TO PROSPECT MANAGEMENT AND TED

TED Data Entry Questions

Q: Is there documentation on how to submit a Research Request?

There is a Research Request course in iLearn, and you can also refer to the Research Requests section of the TED User Guide.

Q: What role do I give the constituent under plan participant, "Decision maker" or "Household Member"?

The prospect on the plan will be given the role of "Household Member" if they are a member of the household record, or "Decision maker" if they are assisting the prospect in the decision but not a member of the household.

Q: Will the automated process that adds the individual to the plan also add the household members to the plan steps?

No. Individual plan participants must be manually added to each plan step as appropriate.

Q: How do I link a donor's gift (aka: "associate revenue") to my plan?

For an opportunity to be linked to revenue, the plan must have a site and plan participants, the opportunity must contain a designation and the amount being applied to each designation, and the opportunity status must be Accepted.

Revenue is associated to a plan opportunity through the following processes:

1. When a gift transmittal form arrives with a gift, **UIF Gift Processing** associates the revenue to the plan listed on the **Gift Transmittal Form**.
2. When a pledge is documented by **UIF Gift Administration**, that team will associate the revenue from the pledge to the appropriate plan.
3. When a planned gift is booked with **UIF Gift Planning & Trust Services**, that team will associate the revenue from the planned gift to the appropriate plan.

Once this process is complete, it will show up in the Revenue Committed field in the opportunity.

Q: How do I link a donor's gift to my plan if the revenue is not associated by Gift Processing upon initial receipt of the gift?

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UIF Research and Portfolio Management has an audit for gifts that may need to be linked to a plan, but this process has limitations. Allow two weeks for Gift Processing or Research to associate the revenue once the gift appears under the Revenue tab. Fundraisers can submit a request to have revenue associated through the Research Request form in TED once the gift appears on the **Attention | Opportunities** tab within the fundraiser's Fundraiser tab in the "Opportunities | Accepted - No Revenue – Overdue" section.

Q: Why do my plans show up twice on the household record?

When a plan is entered, plan participants must be added to the plan. Plans display the household record as well as the constituent records of the plan participants. If the household record has a plan on it and the household record is also listed as a plan participant, that plan will display twice when viewing the household record. Only individual or organization records—not households—should be added as plan participants.

Q: Why are some of my visits not counting?

When visits are entered in TED as general interactions rather than plan steps, the visits do not get counted within fundraiser metrics. To correct this, please ensure all substantive visits with prospects are captured as plan steps and not general interactions. Although fundraisers can select Plan Step as the Category under the Interactions tab, it does not count unless added within a prospect plan.

Q: How can I fix visits that have been added to TED as interactions but need to be on plans?

The most efficient method is to run a copy of the fundraiser's Interaction Detail Report from the UI Reporting menu in TED to see all their interactions with full text. Add interactions to the appropriate plans as plan steps and then delete the general interactions.

Q: My donor already made a payment on his/her pledge, but the pledge is not booked as a pledge in TED yet, how do I get this fixed?

Please contact UIF Gift Administration.

Fundraising Best Practice Questions

Q: Why am I putting a plan step in ahead of time? And who is looking at the steps?

This question gets to the very nature of the plan system in TED. Plans document fundraising strategies and are fully transparent to the advancement community at large. Adding future steps documents the plan strategy, which allows the information to be available to the entire advancement community. This improves collaboration by making it easier for fundraisers to strategically engage with donors through efficient and effective planned touchpoints.

When this information exists in TED, it also allows for proactive steps to be taken to assist gift officers. Future-dated plan steps help UIF Research and Portfolio Management to better partner with fundraisers

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in areas such as trip planning, cycling through prospects during a campaign, and completing research for upcoming visits.

Q: Why would I make a plan historical?

Plans are made historical when the plan objective has been achieved (or abandoned) and all related work is documented. Major Gift plans are typically made historical once the gift is received and its revenue has been associated unless the fundraiser plans to conduct stewardship work.

Q: Why do I need a qualification plan?

Qualification plans (plan type = Qualification) are used to determine interest and capacity. Once a donor is qualified, the plan type can be adjusted as appropriate (e.g., to Major Gift). Tracking qualification work as plans lets other fundraisers know that someone else is already working with those prospects. Please note Chicago does not use Qualification plans except for organizing and managing the suspect pool; qualification is tracked as a stage at UIC.

Q: Are all the fields in the opportunity form required?

The opportunity within a plan provides current information about a prospect's potential gift. Opportunity data is used in active pipeline and campaign pyramid reporting. By the time the gift is booked in TED, all the fields on this form are required. Throughout the process of asking for a gift, however, only the known information is required as the gift officer learns the information. At the time of entering a new opportunity, the expected ask amount, expected ask date, likelihood, and designation should be entered. The opportunity smart form now restricts or requires certain fields depending on the stage of the opportunity.

Q: If a unit other than my own has first affiliation (rank 1), but there is no plan on the record, who should I contact in that unit to begin working with the constituent?

If there is no active plan on the record, contact the senior advancement officer for the unit to inquire about working with the prospect. If there is a historical plan on the record or prior interactions, carefully review them for details before asking for permission to engage with the prospect.

Business Process and Policy Questions

Q: If a constituent has made a gift, but there is no prospect plan on the record, can a stewardship plan be added to the record?

If you are a gift officer, and you recently marked a Major Gift prospect plan for this constituent as historical, you can reactivate the prospect plan to add stewardship steps. You could also create a new Major Gift prospect plan and add stewardship steps. However, if you need to conduct stewardship work not related to a plan, you could create a General Interaction with the **subcategory Stewardship Activity Not on Plan**. In unique situations like this, it's a good idea to consult your manager or your local

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resource for performance management to understand if there are any implications for metrics by reactivating old plans or creating new plans.

If the stewardship work is of a repeatable nature, such as the activities related to stewarding funds, then the work is likely better suited to the Stewardship plans area instead of prospect plans.

Q: How do I know which site I should associate with the plan? Can I use a college or campus-level site?

The site on a plan should indicate the benefiting unit of a gift. In most cases, gift officers work for a single unit and all their plans will be assigned to the same site. For example, a gift officer who works for Urbana LAS in Chemistry is primarily responsible for fundraising for Chemistry, so those plans will be assigned to the site for Urbana Chemistry (1KV413). Regional gift officers will use a wider range of sites, but the rule still applies that the site is the benefiting unit. College-level sites should be used instead of generic department sites (e.g., use 1KP-Engineering instead of 1KP000-Engineering (GENERIC)). In some cases, if the benefiting unit is unknown, the campus level-site is allowable (1-University of Illinois at Urbana-Champaign for Urbana), but when more is known about the gift, the site should be updated to reflect that information.

Q: If there is a conflict between the Plan Site and the Opportunity Designation, will there be any issues associating the revenue?

No, this will not cause an issue. The designation on the opportunity will prevail over the site associated with the plan.

Q: Why didn't my plan get revenue associated when the donor sent in the gift?

The only gift revenue that gets associated via standard business processes are planned gifts, pledges, and gifts that arrive via a Gift Transmittal form. UIF Research and Portfolio Management may catch those not associated through this process during an audit review; however, if revenue has not been associated to a plan two weeks after the gift appears on the Revenue tab, the fundraiser can submit a request through the Research Request area of TED. The simplest way to identify which gifts need to be linked to a plan is to go to the Fundraiser tab, click on the **Attention | Opportunities** subtab, and look at the "Opportunities | Accepted - No Revenue – Overdue" section.

Q: What does Expected Book Date & Amount mean?

Expected Book Date and **Expected Book Amount** are fields in the Opportunity. The Expected Book Date should be used by the gift officer to anticipate the approximate date that the gift will be booked (when the gift will be made or executed gift agreements/documentation will be received).

The Expected Book Amount should be used by the gift officer to approximate the gift amount. The Expected Book Amount may be less than the Expected Ask Amount if the gift officer is making aspirational yet realistic asks.

This should not be added until an ask has been made.

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Q: Why don't my DAPR and Goals numbers match?

Often there are two reasons for the DAPR (Development Activities Profile Report) and the Goals tab to display differing counts of opportunities and visits.

The DAPR is designed to show all activity in TED for gift officers, whereas the Goals tab is only designed to display data related to performance metrics. Due to the purpose of the Goals tab, only opportunities and visits entered into TED that follow the required business practices of Illinois Advancement get counted. This means that plans must have the appropriate plan manager (and secondary solicitors, if appropriate), and that all visits must be recorded as plan steps. Gift revenue must be properly associated to a plan opportunity to count towards the New Business from Pipeline metric.

Q: Do planned gifts count in my metrics?

Yes, these gifts do count in the DAPR and Goals tab. The DAPR shows all activity, regardless of whether it is entered on a plan or in a general interaction. Additionally, the DAPR lists opportunities multiple times when there are multiple secondary solicitors. This is not an error, but a design choice to display clearly who the secondary solicitors are when there is multiple. These two factors can contribute to the numbers being slightly different between the two reporting tools.

UPDATED 4/23/2025

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REVENUE (Blue Navigation Bar) Documentation to be Determined

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COMMITMENT TYPES

COMMITMENT TYPES ASSOCIATED WITH THE SOLICITATION

This document contains detailed information on available commitment types in the TED system. Commitment types are how a constituent plans to make their donation. This includes immediate donations such as outright gifts, long term donations such as a pledge with payments, and deferred donations such as an estate gift given after the constituent has passed. Commitment types are associated with the gift during the Opportunity/Solicitation phase of the prospect plan. Commitment type information can be used as criteria for different analytics in the TED system.

It is important to understand the different types of commitments available to ensure pipeline accuracy and to clearly define commitment expectations.

Commitment Types

HOUSEHOLD COMMITMENT TYPE	REVENUE TRANSACTION TYPE	REVENUE APPLICATION	REVENUE TYPE	REVENUE SUBTYPE	PLEDGE SUBTYPE	HOUSEHOLD COMMITMENT TYPE CODE	REVENUETRANSACTIONTYPECODE	REVENUEAPPLICATIONCODE	REVENUEAPPLICATIONTYPECODE	SOURCE CODE	PLANNED GIFT IS REVOCABLE	RELATED COMMITMENT REVENUETRANSACTIONTYPE	RELATED COMMITMENT REVENUEAPPLICATION	RELATED COMMITMENT REVENUE TYPE	RELATED COMMITMENT PLEDGE SUBTYPE	RELATED COMMITMENT PLANNED GIFT ISREVOCABLE
Outright	Payment	Donation	Gift			OR	0	0	0							
Pledge	Pledge	Donation	Gift		OrangeKrush	PL	1	0	0							
Pledge	Pledge	Donation	Gift		Unspecified-UIF Telemkt	PL	1	0	0							
Pledge	Pledge	Donation	Gift		WUIS Pledge	PL	1	0	0							
Pledge	Pledge	Donation	Gift		UIF Telemkt Pledge	PL	1	0	0							
Pledge	Pledge	Donation	Gift		Major Pledge	PL	1	0	0							

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Pledge	Pledge	Donation	Gift		Documented	PL	1	0	0							
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	OrangeKrush	
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	Unspecified-UIF Telemkt	
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	WUIS Pledge	
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	UIF Telemkt Pledge	
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	Major Pledge	
Pledge Payment	Payment	Pledge	Gift			PP	0	2	0			Pledge	Donation	Gift	Documented	
Irrevocable Deferred	Planned gift	Donation	Gift			ID	4	0	0		No					
Irrevocable Deferred Payment	Payment	Donation	Gift			IP	0	0	0	30000						
Irrevocable Deferred Payment	Payment	Planned gift	Gift			IP	0	6	0			Planned gift	Donation	Gift	No Pledge Subtype	No
Revocable Deferred	Planned gift	Donation	Gift			RD	4	0	0		Yes					
Estate Distribution	Payment	Donation	Gift			ED	0	0	0	10000						
Estate Distribution	Payment	Planned gift	Gift			ED	0	6	0			Planned gift	Donation	Gift	No Pledge Subtype	Yes
Matching Grant Award	Payment Pledge	Matching gift Donation	Gift Gift		Grant	MT GA	0 1	7 0	0 0			Matching gift claim	Donation	Gift	No Pledge Subtype	

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Grant Payment	Payment	Other	Other	Grant		GP	0	4	4							
Grant Payment	Payment	Pledge	Gift			GP	0	2	0			Pledge	Donation	Gift	Grant	
Contract Award	Pledge	Donation	Gift		Contract	CA	1	0	0							
Contract Payment	Payment	Other	Other	Contract		CP	0	4	4							
Contract Payment	Payment	Pledge	Gift			CP	0	2	0			Pledge	Donation	Gift	Contract	
Non-Gift Revenue	Payment	Other	Other	Non-Gift Revenue		NR	0	4	4							
Non-Gift Revenue - Amenities	Payment	Other	Other	Athletic Amenities		NA	0	4	4							
Membership	Payment	Membership	Membership			MS	0	5	2							
Membership	Payment	Membership installment plan	Membership			MS	0	19	2			Membership installment plan	Membership	Membership	No Pledge Subtype	
Not Included	Membership installment plan	Membership	Membership			NI	15	5	2							

REVIEWED 1/10/24

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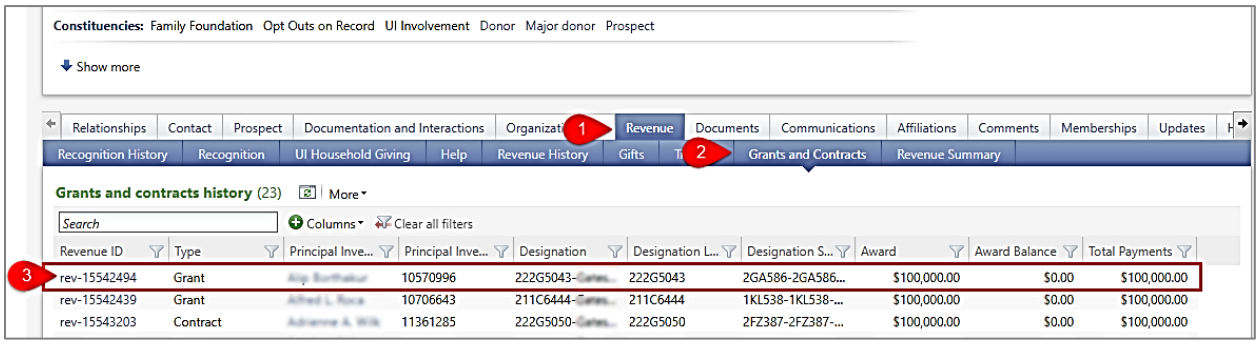
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GRANTS AND CONTRACTS

ACCESSING GRANTS AND CONTRACTS IN TED

Data for grants and contracts, which are two types of awards in TED, can be found on individual and organization records via the **Grants and Contracts** sub-tab under the **Revenue** tab. These awards are classified as pledges in TED, with the payments for grants counting towards cash and the original grant commitments counting towards new business. Contracts are not calculated in cash or new business.

Grants and Contracts Sub-Tab

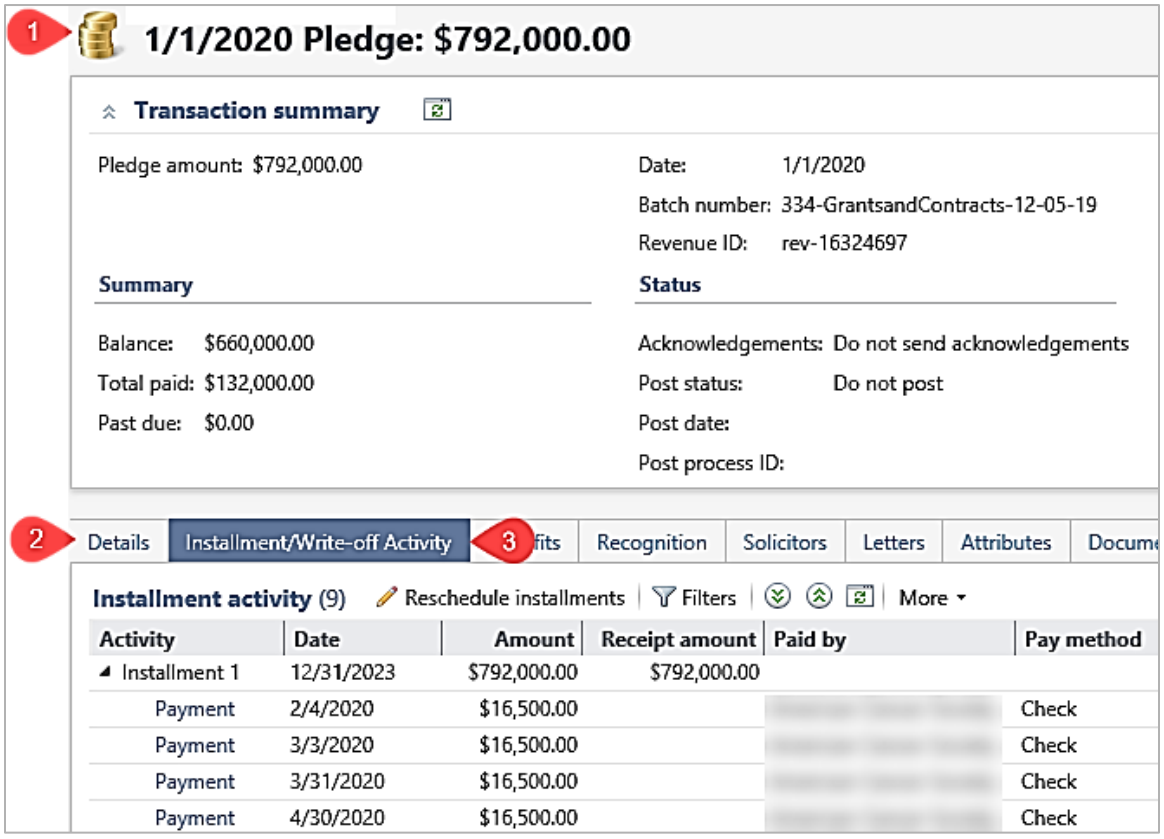


1. Select the **Revenue** tab on the individual or organization record where the grant or contract data is stored.
2. Select the **Grants and Contracts** sub-tab to view grants and contracts data.
3. **Grants and Contracts Data** – Each row of the grants and contracts data contains:
    a. **Revenue ID** – The ID number for the revenue transaction of the grant or contract. This link opens the pledge transaction that contains the original commitment for the grant or contract along with any subsequent payments or write-offs.
    b. **Type** – Identifies if this pledge is for a grant or contract.
    c. **Principal Investigator** - A principal investigator is the holder of an independent grant or contract administered by the university and the lead researcher for the grant or contract project.
    d. **Principal Investigator ID** – The Lookup ID of the Principal Investigator's individual constituent record.
    e. **Designation** – The designation (fund) that the grant or contract is attached to.
    Designation Lookup ID – The Lookup ID number for the Designation.
    f. **Designation Site** – The Site number and description for the Designation.
    g. **Award** – The total of the grant or contract.
    h. **Award Balance** – The balance owed on the grant or contract.
    i. **Total Payments** – The total of the payments that have been paid on the grant or contract.

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Revenue Transactions for Grants and Contracts



1. Once you have opened the revenue transaction for any grant or contract, you can see the date, transaction type, which will be a pledge for grants and contracts, and the amount of the award.
2. The **Details** tab will show details about which designation this award is for and identify if the pledge is for a grant or contract.
3. The **Installment/Write-off Activity** tab - will hold payments and write-offs. Each payment is a clickable link to view the full details for each transaction.

   Note: The schedule or anticipated payments are imported from the monthly Grants & Contracts Banner import and not managed by UIF.

Grant and Contract Details

Negative payments – Some grants or contracts may have a negative payment. The TED database reconciles these negative payments by deducting the negative payment from the first payment of the grant or contract. Negative payments are considered write-offs and can be viewed via the **Revenue History** tab. These negative payments are not posted to the general ledger.

Cycle of New Data Loads – Grants and contracts are imported on the 5th of the month.

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Designation Numbering Scheme – Designation numbers will be eight (8) characters. The first character is a 2. The second and third characters are the university number. 1=Urbana, 2=Chicago, 4=Springfield, 9=University. The last five characters are the grant number from Banner. The fourth character also indicates university: G = Chicago, C = Urbana, L = Springfield.

Zero Dollar Pledges – $0.00 pledges in grants and contracts are those that never materialized.

Recognition Credit – Recognition credit for grants and contracts, both awards and payments, are classified as follows: Self-Grant for grants and Self-Contract for contracts.

REVIEWED 1/29/25

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SPLIT GIFTS AND DESIGNATIONS WITH FUND SPLITS

ENSURING THE DONATION MAKES IT TO THE RIGHT FUND

At times a gift may need to be "split" to ensure that we are using the funds as the constituent has requested. There are two ways that this can happen. Either a split gift or a gift to a designation that has Fund Splits.

In this documentation, you can see how to access these types of gifts and designations as well as learn about the specific way each behaves in TED.

Split Gift or a Designation with Fund Splits?

It's important to understand the difference between the split gift and a designation that has Fund Splits to ensure the donation can be accessed correctly.

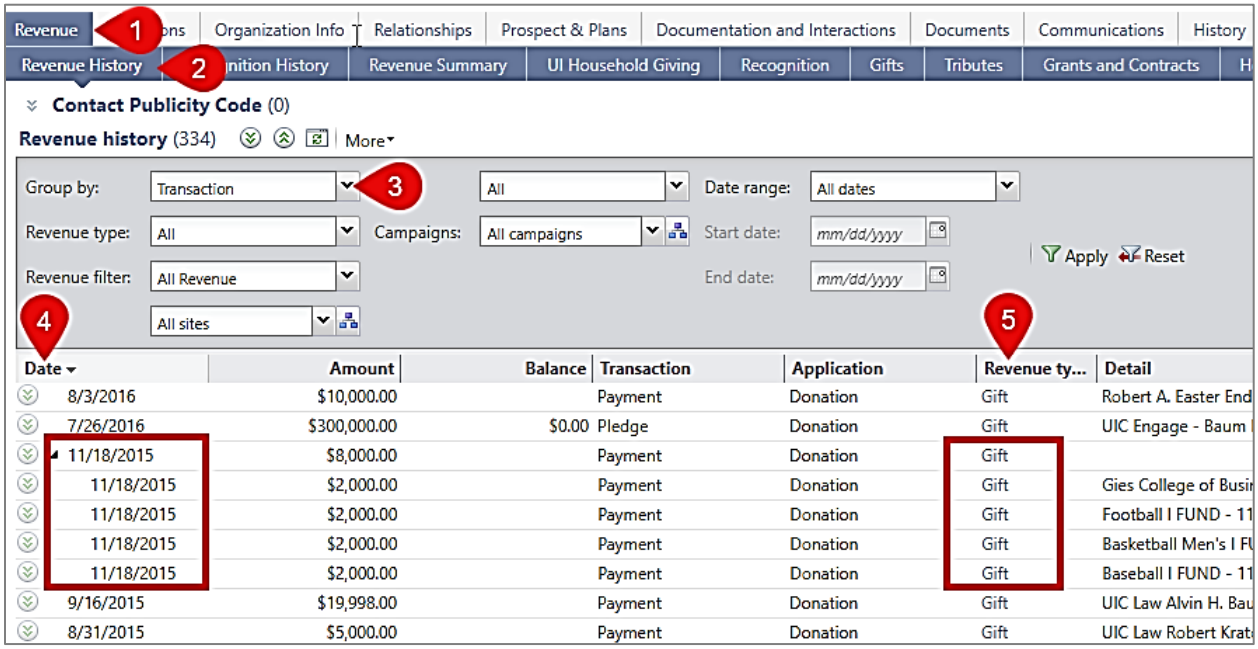
1. A **split gift** is when a donor gives one gift and specifies two or more designations for the gift and what specific amounts go to each. *An example of this can be seen on the 11/18/2015 gift from the Alvin H. Baum Family Fund (Constituent ID#: 10021315), which splits into 4 separate designations.*
2. A "fund" in TED is comprised of two parts: a designation and a purpose, so in the case of a gift to **a designation that has a fund split**, there is one designation with fund splits assigned indicating that the designation benefits more than one university, unit or purpose. *An example of this is* Waco Worthy Albert and Betty Jean Peters Albert Endowment Fund – 11770086.

A designation and a purpose can only have one site assigned, thus the need for the assignment of Fund Splits. Fund Splits exist to ensure the correct Advancement Unit receives the appropriate Fundraising credit. Fund Splits do not directly manage any distribution of actual money. The management of money is handled through the UIF Online Fund Database, where a separate split table is managed for this business function.

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Split Gift on the Revenue History Tab



1. Select the **Revenue** tab on the record associated with the gift you are reviewing.
2. Next click the **Revenue History** sub-tab to view the revenue transactions on the record.
3. In the **Group By** filter, group your view by **Transaction**. Because the single gift transaction gets split to multiple designations this view will allow you to more easily see how the original transaction gets split to each designation.
4. In the grid you can see the original transaction and each split of the revenue with the appropriate amount below it. In this example the original gift is $6,000 but it is split into 3 designations of $2,000 each.
5. Open any Revenue Transaction record by clicking on the **blue link in the Revenue Type column**. There is only one actual Revenue Transaction record for all the separate line items so selecting any of the links associated with the Transaction will open the same record.

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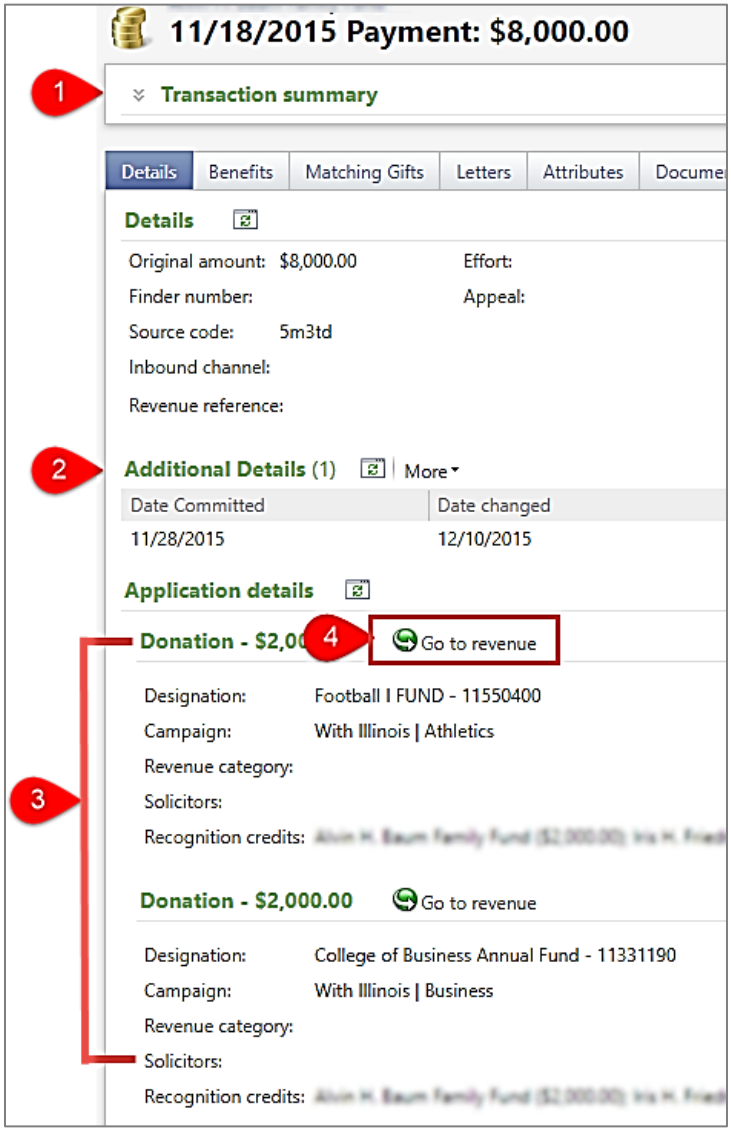
Split Gifts from the Revenue Transaction Record

1. From within the Revenue Transaction record, you can collapse or expand the Transaction Summary with the double arrow icon. In this example the Transaction Summary is collapsed.

2. From the Application Details you can view how this transaction was applied.

3. This transaction is split to multiple designations, each portion is listed with its appropriate amount.

4. You can learn more by clicking on the **Go to Revenue** button to open the Revenue Application record for that portion of the transaction.



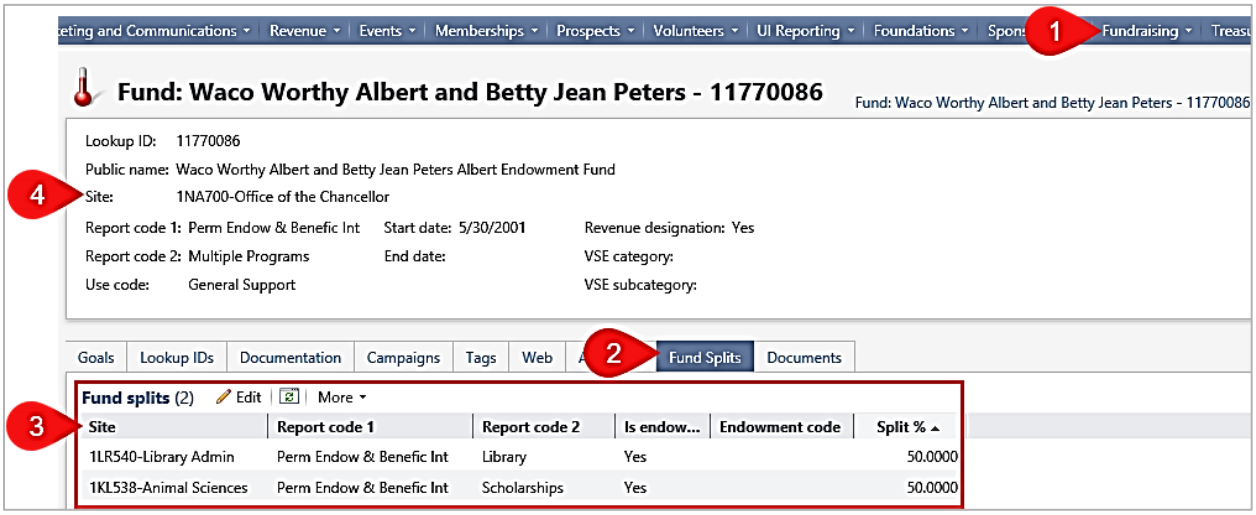


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Designations with Fund Splits

Because a designation and purpose can only have one site assigned, the Fund Splits tab is necessary to ensure that gifts are calculated in reports correctly. This portion of TED does not manage any distribution of actual money. The management of the actual monetary part is handled through Fund Database, accessible via UIF Online, and a separate split table is maintained there.



1. Fund Splits can be found on a designation that benefits multiple sites or purposes. Start by searching for the designation you want to review by using the **Designation Search** found in the **Fundraising** menu in the Navigation Bar.
2. Once you have opened the designation click the **Fund Splits** tab.
3. In the Fund Splits area you will see which sites, purposes, etc. this fund splits to and what percentage benefits each site or purpose in the **Split %** column.
4. The site assigned to a designation with fund splits should be one level above the sites listed in the Fund Splits area. For example: 1LR540-Library Admin and 1KL538-Animal Sciences are two separate Advancement units, so the site for the Waco Worthy Albert and Betty Jean Peters Albert Endowment Fund should be assigned one level above, which would be the Office of the Vice Chancellor for Institutional Advancement for the Urbana-Champaign university. Another example would be a designation that is split within a College, into two different departments. The site assigned to the designation would be one level above, or the College.

UPDATED 7/29/24

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UI REPORTING (Blue Navigation Bar)

UI Reporting section has been removed from the TED USER GUIDE and moved to the new TED Reporting Guide. This can be found on the UIF Help tab.

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POLICIES

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DATA STANDARDS FOR MINORS

THOSE UNDER 18 YEARS OF AGE

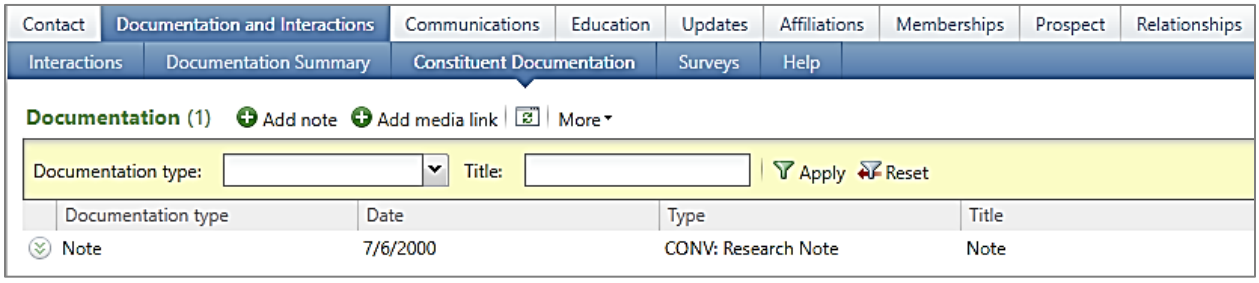
The Foundation is committed to complying with the Children's Online Privacy and Protection Act (COPPA). The Foundation does not knowingly collect information on children under 13 years of age without the consent of a parent or guardian. Still, it is necessary to capture information on constituents' children for several reasons. Event bios written for the President's office and other key advancement leaders need to capture family information for ease of conversation and cultivation of prospects attending events. Also, it is necessary to document if a potential donor has, for example, three children on the cusp of attending college. This information influences how and when a development officer engages with and cultivates the prospect, as children's ages and life stages affect prospects' giving capacities.

Approved Exceptions

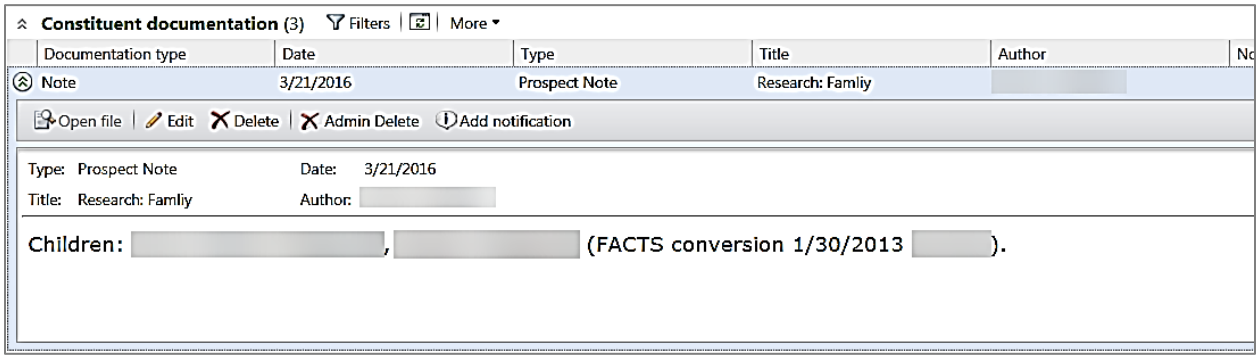
University (Uni) High School students had records in the legacy system. There are records in TED for children attending Uni High. These records do not contain birth dates and they are coded with the proper Opt Outs to ensure they are excluded from marketing efforts.

Proposed Entry Standard

Enter names of children as a Prospect Note. See below:



Note: Format contains children's names followed by the information source.



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Requests for exceptions to this entry standard (i.e. instances where a minor child's birth date is captured) must be approved by the Foundation's Information Security Officer and General Counsel.

UIF Research Department staff will enter Prospect Notes for children. Departmental training will ensure that all Research staff are aware of the standard for data entry. Gift officers and Frontline Fundraisers can submit requests to have children added in a Prospect Note through the Research Request queue.

Research will review child data in the Prospect Note area on an ongoing basis as part of comprehensive record updates. Additionally, Research will audit the Prospect Note area to determine if the note needs to be deleted and/or a record needs to be created in TED. The note will be deleted when the child has had a record created as a result of enrollment at the institution. The Child and Parent relationship in TED will capture this relationship, eliminating the need for a note. In addition, there may be other reasons to delete a Prospect Note and create a new record, including but not limited to:

- Child is an adult and has relationships with other Illinois constituents beyond his or her family.
- Child is an adult and a key executive at prominent company.
- Parent remains engaged with the institution or a $1M+ rated prospect.

All children could have their own entries in TED. The birth date field in the Personal Info section would not be populated until they are 18 years old. Opt-outs would be added to these records to exclude children under age 18 from marketing efforts. Child and parent relationships should be linked in TED under the Relationships tab.

REVIEWED 7/26/24

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DEVELOPMENT POLICIES

http://online.uif.uillinois.edu/InfoCenter/DevelopmentPolicies.pdf

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GLOBAL PROCESSES

This section is not inclusive. As documentation becomes available it will be added to this document.

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CAREER LEVEL ID: EXECUTIVE

GLOBAL PROCESS

To correctly identify constituent career level, UIF Research and Portfolio Management will maintain ad-hoc queries to populate the Careel level field located in Relationships/Employment History area of a constituent's record.

A weekly global change process will wipe all Career levels indicated as Executive, and then refresh with the newest and latest Executive Career Level logic contained within those ad-hoc queries.

Types of Executive Career Level Employment

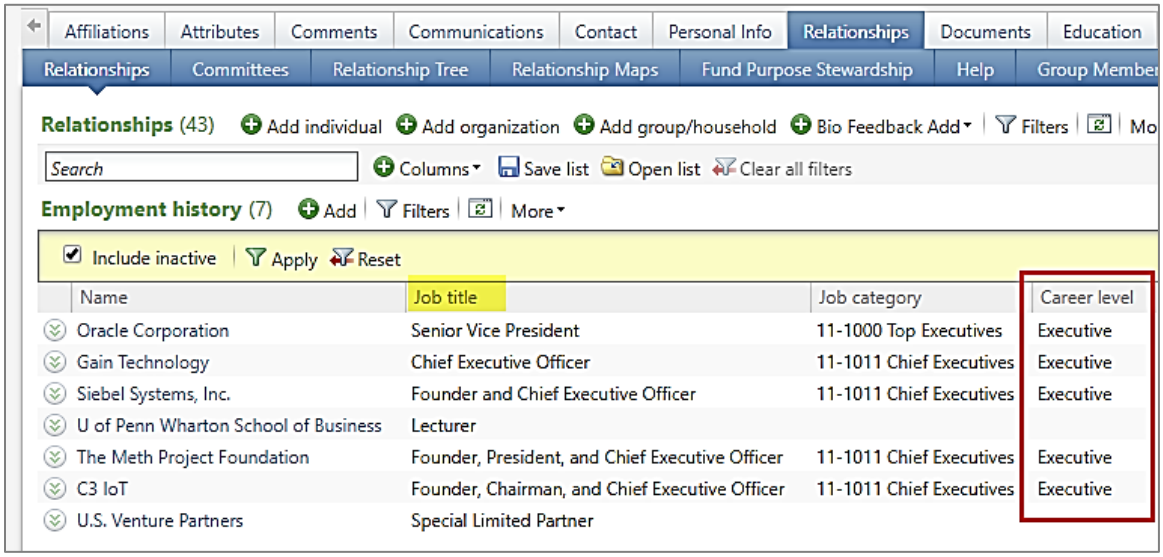
C-suite executives, senior management, owners, founders, top government officials, and other job titles will be considered Executive level.

Weekly Global Change

Job title is the main identifier to determine an Executive Career level. Wildcard matching on job title is used to handle different naming conventions and acronyms. Additional employment-based identifiers, such as job category, may also play a factor.

All Employee-Employer relationships will be examined whether the employment is active or inactive.

When manually adding employment, users must include a job title if the Executive Career level is selected. Selecting the Executive Career level without a job title will break the global change. If you believe someone is an executive but are uncertain about job title, try to verify employment in Linked In, or contact your RPM liaison for assistance.



REVIEWED 12/11/24

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TROUBLESHOOTING

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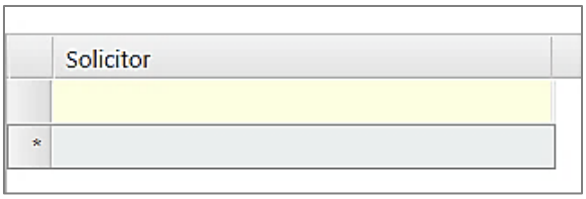
TED SYSTEM BLANK ROW ERROR

WHEN AN ADDITIONAL ROW IS ADDED AND MUST BE REMOVED

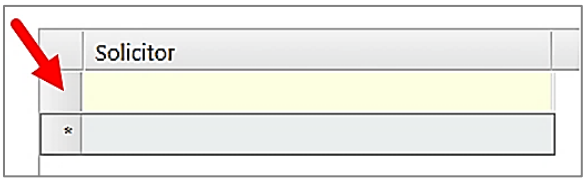
If you are attempting to submit a form and you receive a system error saying that additional information is required even though there is no additional information to add, there is probably a blank line on one of the grids on the form. Several different forms contain grids, including the new record request, interactions, plans, plan templates, and plan steps. This is a common error that affects many forms within TED.

Deleting Blank Rows

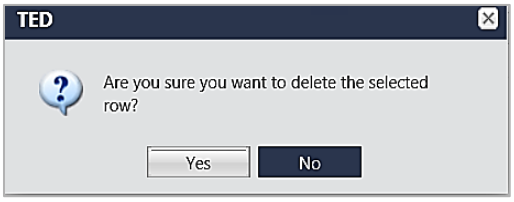
1. To fix the error, review the open window by looking for a grid that has a row with a blank box in the leftmost column, but no data in the column next to it.



2. Highlight the blank row by clicking the blank box in the leftmost column and then hitting Delete on your keyboard. (Use *Function* + *Delete* on a Mac)



3. Confirm that you want to delete the row and submit the form.



REVIEWED 7/11/25

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WAREHOUSE (BBDW) REFRESH SCHEDULE

KNOW WHEN TED IS UPDATED WITH INFORMATION FROM THE WAREHOUSE

Awareness of the refresh schedule will help you plan for the most up-to-date and accurate reporting.

Warehouse Refresh Schedule

The warehouse (BBDW) is refreshed early each morning (except for Sunday).

Data added/changed in TED on Friday will be in the warehouse on Saturday, but data added/changed on Saturday will show Monday since the refresh is not done on Sunday.

REVIEWED 1/30/25

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