DONOR ACKNOWLEDGMENTS

Overview

The following notes describe details for qualification used for generating donor acknowledgments.

Criteria

The following criteria qualifies an entity to be included in this program:

A. Donors receiving recognition credit for a gift transaction between yesterday and 5 months prior.

Exclusions:

- o Associated donors with type Joint (J), In Memory Of (M), or In Honor Of (H)
- o Deceased donors[1]
- o Anonymous donors[2]
- o Spouses of Anonymous donors[3]
- o Transactions with a suppress acknowledgment[4]
- o Transaction types of Grant Installment (GI), Internal Transfer (IT), Professional Development (PR), Government Gifts (GG), or Government Pledge Payments (GP).

Business Rules

The following business rules were used to determine entity qualification in this program:

- ▪ [1] Record type code of deceased/dissolved (D) or deceased/pending (P)
- ▪ [2] Utilizes anonymous smart field, which is defined as an entity with a Special Handling type of Anonymous Entity (ANO) with Permanent (P) or Temporary (T) status.
- ▪ [3] Utilizes spouse anonymous smart field, which is defined as an entity whose spouse has a Special Handling type of Anonymous Entity (ANO) with Permanent (P) or Temporary (T) status.
- ▪ [4] Utilizes suppress acknowledgment smart field, which is defined as a transaction with a gift acknowledgment letter of suppress acknowledgment (SA).

Revision History

The following revisions have been requested for this program:

- ▪ **June 16, 2003**: Request by Cathy Rathbone to exclude Internal Transfers, Professional Development, Government Gifts, and Government Pledge Payments.
- ▪ **October 30, 2003**: Request by Jennifer Leinbach (confirmed by Cathy Rathbone) to only include joint name and salutation if gift was "joint".