



Faculty and Staff Coding Policy

This policy outlines how constituent codes and relationship records are used to track current and former SU employees including faculty, adjunct faculty and staff. Advancement Services staff are responsible for creating new constituent records and forming SU employment records. Please contact BioUpdates@seattleu.edu if you need an SU employment record altered.

Adding New Faculty and Staff Records

New faculty, adjunct faculty and staff will have their own constituent records in the Alumni and Donor database, with:

- The appropriate Constituent code with a Date From corresponding to their start date. If no start date is known, the date the Constituent code was added to the record will be used. Faculty receive the “Faculty” code, adjunct faculty the “Faculty (alt)” code and staff the “Staff” code
- An organizational relationship with Seattle University (C0083860). This relationship will have the following default values:
 - Industry = Education
 - Print organization name with address = True
 - Print Position = True
 - Relationship = Employer
 - Reciprocal = Employee
 - Date From = employment start date or added date. This date should match the constituent code Date From.
 - Employee = True
 - Primary Business Information = True, with the exception of adjunct faculty. We only mark SU as the primary employer for adjuncts if we do not know if the adjunct has another employer.
 - Address and phones = employee’s campus address, email and phone.
 - Profession values:
 - Faculty = Faculty
 - Faculty (Alt) = Adjunct Faculty
 - Profession is not required for Staff but should be added if known.
- The following relationship attributes:
 - SU Department = the specific department the employee works for.
 - SU College Area = the overarching school or division the employee works for.
 - Neither attribute requires a Date.



Handling Former Employee Records

Former faculty and staff are typically removed from our database unless another connection has been recorded between that former employee and Seattle University. Former employee records must be deleted if ALL of the following criteria are met:

- No other relation to SU exists (no constituent codes other than Friend)
- No gift records
- No event attendance
- No Campaign capacity rating
- No current prospect manager
- If Attributes or Notes exist, please contact the Director of Advancement Services

If the former employee fails to meet ANY of the criteria above, the constituent record for that former employee is retained. The following steps must be taken in order to correctly code the former employee:

- Add a Date To equal to the last date of employment on the appropriate constituent code. If the last date of employment is unknown, use today's date.
- If no other than Faculty, Faculty (alt) or Staff exist on the former employee's record, add the "Friend" constituent code with a Date From equal to the last date of employment. If the last date of employment is unknown, use today's date.
- Remove the SU business phone and email from the preferred address.
- Check 'Has No Valid Address' on the Bio 1 tab if the only address we have is an SU address.
- Open the organization relationship with SU and make the following changes:
 - Print organization name with address = False
 - Print Position = False
 - Relationship = Former Employer
 - Reciprocal = Former Employee
 - Employee = False
 - Primary Business Information = False
 - Date to = employment end date or change date

Position Changes for Current Faculty/Staff

A chronological history of position changes will be recorded in the Alumni and Donor database using multiple SU relationships. There will be one SU relationship for each position change. To record this chronology:

- Former the SU relationship associated with the staff member's previous position using the organization relationship field change steps outlined above.
- Do not alter the Constituency codes unless the position changes between Staff, Faculty or Adjunct Faculty.
- Create a new SU relationship using the steps outlined in the New Faculty/Staff section of this document.

Note: We do not create new Relationship records for interim positions. Instead, position title is changed to reflect that interim status, and changed back once that period ends.