Inactivating Constituent Records by Individual Request

This policy dictates how we mark Constituent records for people who should not be contacted by SU in any way. These requests may come from the actual Constituent or derive from circumstances that would deem contact between SU and the Constituent inappropriate.

Inactivating Constituent records should only be used as a last resort. Use of solicit codes alone is sufficient to remove a Constituent from specific avenues of communication. Constituent inactivation must only be used in extreme cases where an individual or organization is upset with the University or there is an internal concern (from public safety or SU Leadership) about communicating with the Constituent.

It is also appropriate to inactivate Constituents who, given the opportunity to opt back into communications, tell us they no longer want any contact from SU. Inactivating these records will prevent them from being asked to opt back into communications again.

Communicating with the Constituent:

If you come in contact with a Constituent who doesn't want to receive SU communications:

- Try to gauge if record inactivation is appropriate. Asking a few questions may reveal the Constituent's true intent. If the Constituent only wishes not to be solicited or to not receive email, applying a solicit code(s) will sufficiently meet the Constituent's request. Email BioUpdates@seattleu.edu with your request to add solicit codes to a record.
- If the Constituent clearly states he/she no longer wants to be contacted in any way by SU or it is inappropriate to pry because the Constituent is angry, the Constituent record should be inactivated.

Getting a record inactivated:

Only Advancement Services staff will inactivate RE records. If you feel record inactivation is appropriate, email your record inactivation request to BioUpdates@seattleu.edu. This request must include:

- Constituent name and ID of the record to be inactivated
- An objective description of why you want the Constituent record inactivated. This text will be entered into RE as written by you. Be mindful of possible text another may find offensive. Also be mindful of privacy issues. All RE Users will be able to read your description once it is entered.

Steps to Inactivate a Constituent Record:

1. Check the "Is Inactive" box on the Bio1 tab of the Constituent's record.
2. Add the "No Mail", "No Solicit" and "No Email" solicit codes to the record. By default, queries do not include inactive records. These solicit codes should still be applied to the Constituent record as an added safeguard against contacting someone who does not want to be contacted.

3. Add a new Notepad to the Constituent record:
   o Date = date of record inactivation
   o Type =
      ▪ If the Constituent personally requested not to be contacted, use the "Inactivated by Constituent Request" Notepad type.
      ▪ If the reason for record inactivation originated from an internal SU concern (ex. public safety) and not from the actual Constituent, use the "Inactivated by Internal Request" Notepad type.
   o Author = your RE username (this is the default)
   o Description = "Record Inactivation by Request:" and include the name of the SU staff member who relayed the record inactivation request. For example, this could read "Record Inactivation by Request: Brian McGuire" if Brian McGuire asked that the record be inactivated.
   o Notepad Text =
      ▪ Text provided by the SU staff person who personally communicated with the Constituent in question.
      ▪ If you had contact with the Constituent, or the reason for inactivation was an internal concern, write an objective description of why you inactivated the Constituent record. Be mindful of possible text another may find offensive. Also be mindful of privacy issues. All RE Users will be able to read your description.
   o Save and close the Notepad.