Advancement Services | Seattle University

Working with Education Records and Relevant Constituent Coding

This policy outlines how and when current students, alumni and their parents are coded as such, and best practices for working with Education records. This policy pertains to data imports and on the fly coding. Only trained Advancement Services personnel may perform the tasks described below.

Constituent Coding Rules

Relevant Constituent Codes
- *Graduate Alumni*: Students who graduate from an SU graduate program
- *Undergraduate Alumni*: Students who graduate from an SU undergraduate program
- *Certificate Alumni*: Students who earn a certificate from SU
- *Withdraw Alumni*: Students who withdraw from an undergraduate program after earning 90+ credits
- *Current Student*: Typically undergraduate seniors and 3-L students as these are the only types of students imported into the database. Other types of current students are added to the database only on an as needed basis to record information such as student awards and other affinity data not collected in the import process.
- *Parent of Current Student*: Parent of a current undergraduate student. Parents of graduate and certificate students are recorded as Friends.
- *Parent of Alumnus*: Parent of an undergraduate or withdraw alumnus. Parents of graduate and certificate alumni are recorded as Friends.

Applying Current Student and Alumni Constituent Codes:
- Undergraduate seniors and Law School 3-Ls are marked with the Current Student constituent code. These groups are imported each year, but are also hand-entered as needed.
- An alumnus may have one of each graduate, undergraduate and certificate alumni. Each of these codes must have a Date From corresponding to their graduation date of the associated program. If a constituent earns multiple degrees of the same level or certifications, the earliest Date From is used.
- The hierarchy for the alumni codes are as follows:
    1. Graduate Alumni
    2. Undergraduate Alumni
    3. Certificate Alumni
- An alumnus may only have one Withdraw Alumni code. The code's Date From will correspond to the last date the student left a program. Remove this code if the alumnus completes a degree or certification. This code must not exist on a constituent record with one of the other alumni codes.

Applying Parent of Current Student and Parent of Alumnus Codes:
- Parent of Current Student codes are only added to parents of undergraduate students who are younger than 22 (traditionally aged). The Date From should correspond to the date their child

became an SU student. If there are multiple children attending SU, this date should correspond to the earliest admission date.

- All Parents of Current Students must have a child relation representing that current student. This relation can be either a ghost or constituent relationship. Ghost child relations must have the attribute "Colleague ID" with the following entries:
  - o Description = #<the student ID>
  - o Date = the student's anticipated graduation date
- Parent of Current Student codes are not applied to the parents of current Graduate or Certificate students.
- The Parent of Alumnus Code is applied to parents of Undergraduate and Withdraw alumni with the Date From equal to the date their child's most recent graduation or departure from a program.
- Parent of Alumnus codes replace Parent of Current Student codes as children graduate. For instances when a parent has a child who is still a current student and another child who is an alumnus, keep the Parent of Current Student code. Do not apply the Parent of Alumnus code.
- Check individual relationships on both Parent and Child records to assure validity/reciprocity.

Adding Education Record and Attributes

Raiser's Edge education fields Compared to Colleague education fields:

RE Education Record	Colleague SACP Screen
School Name	Not listed, although always Seattle University
School Type	Dept/Division/School – rightmost text box
Campus	NA
Known Name	NA
Dept	Dept/Division/School – leftmost text box
Degree	Degree
Degree (when entering certifications)	CCDs
Class Of	NA
Date Entered	Start/End Dt – leftmost box
Date Graduated	Start/End Dt – rightmost box , Status = "G Graduated"
Date Left	Start/End Dt – rightmost box, Status = "W Withdrawn"
Specialization	Specialization and Program Additions
Major(s)	Majors and Program Additions
Minor(s)	Minors and Program Additions

Manually Adding RE Education Field Values and Notes for Alumni:
- Transcribe as many field values from Colleague into Raiser's Edge (table above) as possible.
- For SU education records, School Type should point to one of the SU school types. Non SU education records should point to non SU school types

- Class Of should refer to the calendar year in which a student graduates or leaves. If an alumnus tells us they identify with a year other than the calendar year in which they graduated, the Class Of should be changed to match the alumnus' preference.
- Education records may be entered for schools other than SU. Minimally, we only need to know the name of the school attended. Application of non SU education records has no effect on RE constituent coding.
- Education records may be entered for SU students who left without completing a program at SU. Enter "NDGR - Attended" for the degree. Do not enter a class of unless the student meets the Withdraw Alumni criteria. Do not apply the Withdraw Alumni code unless the proper criterion has been met.
- Enter the appropriate Academic Level attribute, even if the program hasn't been completed (withdraw).

Manually Adding RE Education Field Values and Notes for Current Students:
- Enter "Seattle U" as the school name, and enter the School Type and the Class Of referring to the calendar year the student anticipates to graduate. **Do not perform other record field entry.**
- Enter the appropriate Academic Level attribute, even if the program hasn't been completed.
- Enter other education attributes as necessary (student awards, affinity groups, etc.)
- Do not enter Department, Specialization, Majors or Minors. This entry will complicate future alumni imports.

Education Attributes Added Via Import:
- *Honor* – academic honors
- *High School* – local Catholic high school listing. Get this for Matteo Ricci grads only
- *Athletics Varsity Sports* – Varsity level sports played while attending SU. An attribute will appear for each year a sport was played.
- *Scholarship* – scholarships earned while attending SU. An attribute will appear for each scholarship earned with the corresponding Colleague Award Code as the attribute description.
- *Academic Level* - the academic level represented by the Education Record. Possible selections include Graduate, Undergraduate, Certificate or Unknown.