June 7, 2023 Coffee Chat Nuggets Donor Member Services Part 2
Featured Speaker Glee Pavlova, Jo Ellen Campbell
Attendance: 33

Overview
-- 25 Full time positions-accounting, recording, bio maintenance for gift processing for charitable giving as well as memberships for alumni association and answering questions about giving, keeping constituent records updated.

Matching Gifts

- vast majority of matching gifts come by wire transfer-Jodi Snook is specialist. Processing is different than regular gifts. Extra steps are needed to link the match to the original donor. Soft credit given and will show up in household giving totals but not on the original donor's record. Many more matching gifts are being received. psugiftmatch@psu.edu monitored mailbox for matching questions.

Pledge reminders

monthly review no reminder-found on Edds for coding 005 and 009. Should be reviewed each month in addition to regular unit pledges. These don't get reminders unless unit specifically requests a pledge to be sent. Check in Central Development Drop down in Edds instead of Active All. JoEllen Campbell is expert in pledge reminders

No Pledge reminders sent for non-Binding pledges

Additional receipts or pledge reminders can be requested from DMS. Multi-media print does the mass printing of receipts and pledge payments

Here is the link to the gift receipt form - https://www.lionlink.psu.edu/XP_GiftReceipting.nsf/ROCR.xsp
Can you run a query about the pledge reminders that are attached to your unit? Not currently

AWA random log offs-

 send a ticket to DDAR support so that they know the magnitude of the problem include specifics about drop offs, date time situations and include screen shot of error messages

AWA Updating addresses for home and business. Start a new screen and it will overwrite the existing data. Do this instead of trying to correct the existing record. This will also work for home and business phone too

Use Edge as that is the preferred because it is with Microsoft. Don't use Chrome. Here is the link
https://advanceweb.psu.edu/advanceweb9100/login.aspx?d=default.aspx