

Please fill out this form to request an append to data that you've already compiled through Advance, Michelangelo or Reeher. Please provide the elements you would like appended. By submitting this request, you agree that this does not in any way violate the university policies for appropriate use of the data.

Provide Your Contact Information

Full Name:

E-mail:

Phone:

School / Unit / Department:

Criteria and Formatting

Request Delivery Date:

Please use 00/00/0000 format

Please note: Advancement Services can deliver data within 5 days after receipt of all information required. Additional time may be needed for complex or formatted reports, etc.

This information will be used for a:

Solicitation

Letter

Survey

Newsletter / Magazine

Prospect Research

Thank You / Donor List

Event Invitation

Regional Visit

Honor Roll

Other

If Solicitation

Request Appeal Code

Apply new appeal code to populated entities

Date Communication will be sent to
vendor or used by dept

Please use 00/00/000 format

List more than two weeks old must be re-pulled to allow for constituent opt-outs. Please plan accordingly.

Please provide a detailed description of how this information will be used.

Delete Duplicates

Yes No N/A

Filter by Household

Yes No N/A

Information to Append (add to existing spreadsheet)

Note: ® indicates that you can currently append this information in Reeher

Combined Salutations

Joint Salutation HS Salutations Sort Name

Primary Salutation & Names

Salutation
Preferred Mailing Name
Nick Name ®
Maiden Name ®
Prefix ®
Personal Suffix
Professional Suffix

Spouse Salutation & Names

Salutation
Preferred Mailing Name
Nick Name ®
Maiden Name ®
Prefix ®
Personal Suffix
Professional Suffix

Demographics

Age ®
Gender ®
Ethnicity ®
Spousal Age ®
Spousal Gender ®
Spousal Ethnicity ®

Membership

CAAA Member
DCC Member
Chancellor's Laureate
Trustee

Mailing Address

Valid Address
Preferred Address
Home Address ®
Business Address ®

Use "valid address" in most cases, as this is the highest ranking address based on the following hierarchy / order: Preferred, Home, Business, Parent, Additional Home, Additional Business. This will most likely return all entities with an address.

Phone

Valid Phone
Home Phone ®
Business Phone ®
Cell Phone ®

E-mail Address

E-mail Address
Additional E-mail Address
Spousal E-mail (if applicable)
Spousal Additional E-mail (if applicable)

Please note: e-mail addresses for 250 entities or over require written / e-mailed approval from the office of the Vice Chancellor of Development and CAAA. Please include authorization as needed.

Include Relationship Manager information: ID Number, First & Last Name, and Office

Yes No

Append the following Special Handling Codes:

Do Not Contact	Do Not Solicit	Do Not Invite
Do Not Mail	Do Not Mail - Solicit	Do Not Mail - Invite
Do Not E-mail	Do Not E-mail - Solicit	Do Not E-mail - Invite
Do Not Phone	Do Not Phone - Solicit	

Note that if a special handing code opts out an entity from phone, mail, or e-mail - the data will not be released.

Please include any other information you would like appended to your data set

E-mail Approvals

If applicable - I've included an approval from the following:

Vice Chancellor - Shaun Keister

Assistant Vice Chancellor - Rich Engel

Send this completed form to devarhelpdesk@ucdavis.edu and keep a copy for your own records. Please attach any additional supporting documentation to the e-mail such as your data spreadsheet and approvals (if applicable). You can expect an e-mail or phone acknowledgement of your request within two working days. If you do not hear from us within that timeframe, please call the help desk at (530) 754-1106 or send a follow up e-mail.