



Bio Update Request Form in TAS

Procedure

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General Description

Description / Scope: Updating biographical information from an individual constituent record.

Purpose: This tool streamlines the biographic update process by allowing any TAS user to submit biographic updates directly from an individual record in TAS rather than having to send the individual's ID number and information updates in an email to submit it to Advancement Records.

The submissions will automatically be routed to the Records team where they will be reviewed and updated in TAS. Typical turnaround time is within 1-3 business days.

The tool will reduce the chance of errors by eliminating the need for the Records staff to re-key information from an email into the database.

The form can be used to update a single tab or multiple tabs. When you're ready, click the submit button found at the bottom of each screen.

Who Performs /

Responsibility: Any TAS user can access the form.

When to Perform: Specific Circumstances:

To submit the following types of updates for an individual record already in TAS:

- Personal information
- Addresses
- Phones
- Emails
- Employment
- Spouse
- Individual relationships

Overview of Steps

1. **Navigate to the constituent record that you want to update.**
2. **Click the Bio Update Request link found under Tasks in the explorer bar on the left hand side of the screen. This will open the Bio Update Request form.**
3. **Enter any updates to the constituent's personal information on the Personal tab.**
4. **Enter any updates to the constituent's address information on the Address tab.**
5. **Enter any updates to the constituent's email addresses on the Email tab.**
6. **Enter any updates to the constituent's phone numbers on the Phone tab.**
7. **Enter any updates to the constituent's spouse or life partner relationship on the Spouse Relationship tab.**
8. **Enter any updates to the constituent's employment information on the Employment tab.**
9. **Enter any updates to the constituent's individual relationships on the Relationships - Other Individual tab. Examples include children, parents, other relatives, financial advisors, etc.**
10. **Click the submit button from any tab to complete the update request.**

Detailed Steps

- 1 Navigate to the constituent record that you want to update.

Special Warnings:

The bio update request form is available only on TAS records for **individuals**. It is not currently available on organization, household or group records.

- 2 Click the Bio Update Request link found under Tasks in the explorer bar on the left hand side of the screen. This will open the Bio Update Request form.

How to Do:



Clicking the link will take you to a form with tabs for updating personal info, addresses, emails, phones, spouse info, employment info and individual relationships.

You can use the form to update a single tab or multiple tabs. When you're done making updates, just click the submit button found at the bottom of any tab. This will submit all of the changes to the Advancement Records team. Most updates will be completed within 1-3 business days.

Special Warnings:

You must be viewing the record as a Constituent to see the Bio Update Request link.



- 3 Enter any updates to the constituent's personal information on the Personal tab.

How to Do:

The Personal tab can be used to update name fields, marital status, deceased information, gender or birthdate.

The screenshot shows a web browser window titled "Biographic Update Request". The "Personal" tab is selected, showing fields for Title, First Name (Brutus), Middle Name, Last Name (Buckeye), Familial Suffix, Professional Suffix, Nickname, Maiden name, and Marital status (Unknown). There is a checkbox for "Constituent is deceased". Below this are fields for Deceased Date, Deceased source, and Deceased Source URL, with a note to enter the website URL for the obituary or other source if applicable. There are also fields for Gender (Unknown) and Birth date. A large text area for "Comment" is at the bottom, with a note that the comment will not display on the constituent record. At the very bottom, there is contact information for questions about the form and "Submit" and "Cancel" buttons.

Name information

Enter new information directly into the text boxes or use the down arrows to pick the appropriate value.

To update an existing value, you may type over it or pick a new value from the drop down. To delete incorrect information, you may delete what is in the field and leave it blank.

Marital Status

Choose the appropriate value by clicking on the drop down arrow.

Constituent is deceased

Check the box and fill in the decease date and source if known. If you have a link to the obituary or other online source, please copy and paste it into the Deceased Source URL field.

Enter the date in mm/dd/yyyy format. If you do not know an exact decease date you can enter a month and year (mm/yyyy) or just a year (yyyy).

Gender

Choose the appropriate value by clicking on the drop down arrow.

Birth date

Enter the date in mm/dd/yyyy format. If you do not know an exact birth date you can enter a month and year (mm/yyyy) or just a year (yyyy).

Comment

Enter any additional notes or instructions in the comments box.

If you have other updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

4 Enter any updates to the constituent's address information on the Address tab.

How to Do:

Add an address

Click this button to add a new address. If the new address replaces an existing address you can indicate that by checking the "Recently moved/changed from this address?" checkbox.

The screenshot shows the 'Biographic Update Request' form with the 'Address' tab selected. The form has several tabs: Personal, Address, Email, Phone, Spouse Relationship, Employment, and Relationships - Other Individual. The 'Address' tab contains the following sections:

- Add an address** (green button) and **Clear Address Data** (red button).
- New Address** section:
 - Note: See the Employment tab for employer address changes.
 - ☒ Add this address to Spouse
 - Type: Home (dropdown)
 - Country: United States (dropdown)
 - Address: 1 Stadium Dr (text input)
 - City: Columbus (text input)
 - State: Ohio (dropdown)
 - ZIP: 43210 (text input)
 - ☒ Recently moved/changed from this address?
 - Old address: Home (1 Buckeye Lane; Primary) (dropdown)
 - ☒ Is Primary (This is the preferred address.)
 - Note: One address must be marked as primary
 - Information Source Comment: Forwarding information from returned mail. (text input)
- Current Address** section:
 - Note: See the Employment tab for employer address changes.
 - Address: 1036 Mainsail Dr
 - City: Naples
 - State: Florida
 - ZIP: 34114-7811
 - Type: Seasonal
 - Country: United States
 - Seasonal Start Date (MM/DD): 12/26
 - Seasonal End Date (MM/DD): 4/1
 - ☐ Is Primary (This is the preferred address.)
 - Note: One address must be marked as primary

At the bottom, there is a footer with contact information: 'Questions about this form or other biographic data? Email bioupdate@osu.edu or call (614) 292-2141.' and two buttons: 'Submit' and 'Cancel'.

Existing addresses

For an existing address you can:

- Mark a new preferred address by checking the "Is Primary" box.
- Update the Seasonal Dates for an existing seasonal address
- Mark an address as no longer valid when you do not know the new address by checking the "This is not a valid address for this constituent" box.
- Report a typographical error by noting it in the comment box at the bottom of the screen.

If you have additional updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

Special Warnings:

Business addresses should be updated on the Employment tab.

You cannot uncheck the "Is Primary" check box. Instead, click the "Is Primary" check box next to the address you want to mark primary and the old primary flag will automatically be unchecked. If there is only 1 current address on the record, add a new address and mark it primary.

5 Enter any updates to the constituent's email addresses on the Email tab.

How to Do:

Add an email

Click this button to add a new email address. If it should be the preferred email, check the "Is Primary" box. If not, it will be added as type "Other."

The screenshot shows the 'Biographic Update Request' form with the 'Email' tab selected. The form has tabs for Personal, Address, Email, Phone, Spouse Relationship, Employment, and Relationships - Other Individual. Under the 'Email' tab, there are two main sections: 'New Email' and 'Current Email'. The 'New Email' section has a text input for 'Email Address' with the value 'bbuckeye@brutus.com', a checked 'Is Primary' checkbox, and a note: 'Note: One email must be marked as primary. (Any address not marked as primary will be added as email type 'Other')'. The 'Current Email' section lists two existing emails. The first has 'Email Address: buckeye.1@osu.edu', 'Type: Other', and a checked 'This is not a valid email for this constituent' checkbox. The second has 'Email Address: brutus@osu.edu', 'Type: Preferred', and an unchecked 'Is Primary' checkbox. Both current emails have the same note as the new email. At the bottom, there is a 'Note' section with a text area for additional notes or instructions.

Existing email addresses

For an existing email you can:

- Mark a new preferred email by checking the "Is Primary" box.
- Mark an email as no longer valid.
- Add a note in the comment box.

If you have additional updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

Special Warnings:

You cannot uncheck the "Is Primary" check box. Instead, click the "Is Primary" check box next to the email you want to mark primary and the old primary flag will automatically be unchecked. If there is only 1 email currently on the record, add a new email and mark it primary.

6 Enter any updates to the constituent's phone numbers on the Phone tab.

How to Do:

Add a phone

Click this button to add a new phone number. If you enter the 10-digit number and press the tab key, the phone number will be formatted with parens and a hyphen.

If the new number replaces an existing one you can indicate that by checking the "Phone number changed?" checkbox and selecting the number it replaces in the drop down box.

The screenshot shows the 'Biographic Update Request' form with the 'Phone' tab selected. The form has several tabs: Personal, Address, Email, Phone, Spouse Relationship, Employment, and Relationships - Other Individual. The 'Phone' tab contains the following sections:

- Add a phone** button (green plus icon).
- Clear Phone Data** button (red X icon).
- New Phone** section:
 - Phone Type: Home (dropdown)
 - Phone Number: (614) 292-2825 (text input)
 - Country: United States (dropdown)
 - ☒ Is Primary (This is the preferred phone)
 - Note:** One phone must be marked as primary
 - ☒ Phone number changed?
 - Old Phone Number to replace: Home-1-800-GO BUCKS (dropdown)
 - Information Source Comment: (text area)
- Current Phone** section:
 - Note:** If you have new contact information, please add it first before updating existing.
 - Phone Number: (614) 291-9802
 - Phone Type: Business
 - Country: (dropdown)
 - ☐ Is Primary (This is the preferred phone)
 - Note:** One phone must be marked as primary
 - ☐ This is not a valid phone number for this constituent.
 - Phone Number: 1-800-GO BUCKS
 - Phone Type: Home
 - Country: (dropdown)
 - ☐ Is Primary (This is the preferred phone)
 - Note:** One phone must be marked as primary
 - ☐ This is not a valid phone number for this constituent.

Existing phone numbers

For an existing phone number you can:

- Mark a new preferred phone by checking the "Is Primary" box.
- Mark a phone number as no longer valid.
- Add a note in the comment box.

If you have additional updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

7 Enter any updates to the constituent's spouse or life partner relationship on the Spouse Relationship tab.

How to Do:

Add new spouse relationship

First check to see if the spouse has a record in TAS using the Constituent Search box. If the record is found, highlight it and click select. The spouse name fields will automatically populate. Notice that the name fields are grayed out. If you need to change the spouse name fields, first complete this request; then navigate to the Spouse record and submit another Bio Update Request.

If the spouse record does not exist in TAS, you can enter the new spouse information and marriage information in the fields displayed.

The screenshot shows the 'Biographic Update Request' window with the 'Spouse Relationship' tab selected. The form is divided into two main sections: 'New Spouse Information' and 'Current Spouse Information'.

New Spouse Information:

- Constituent Search: Ms. Bonnie Jean Buckeye
- Spouse Title: Mrs.
- Spouse First Name: Bonnie
- Spouse Middle Name: Jean
- Spouse Last Name: Buckeye
- Familial Suffix: (dropdown)
- Professional Suffix: (dropdown)
- Nickname: (text field)
- Maiden name: (text field)
- Marriage Date if known (use format MM/DD/YYYY): 9/1/2014
- Bonnie J. Buckeye is the: Spouse
- Brutus Buckeye is the: Spouse
- Marital status: Married

Current Spouse Information:

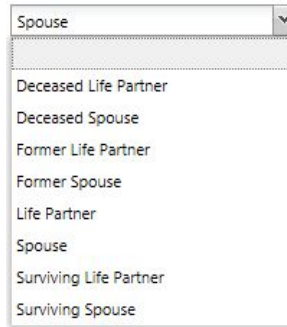
- Lookup ID: Ms. Betty Ann Buckeye
- Spouse Title: Ms.
- Spouse First Name: Betty
- Spouse Middle Name: Ann
- Spouse Last Name: Buckeye
- Familial Suffix: (dropdown)
- Professional Suffix: (dropdown)
- Nickname: (text field)
- Maiden name: (text field)
- Marriage Date if known (use format MM/DD/YYYY): (text field)
- Date Marriage Dissolved if known (use format MM/DD/YYYY): (text field)
- Brutus Buckeye is the: Former Spouse
- Betty A. Buckeye is the: Former Spouse
- Marital status: Divorced

Update an Existing Spouse Relationship

For an existing spouse relationship you can:

- Add the marriage date
- Add the divorce date

- Change the relationship type

A dropdown menu with a downward arrow on the right. The current selection is "Spouse". The list of options includes: Spouse, Deceased Life Partner, Deceased Spouse, Former Life Partner, Former Spouse, Life Partner, Spouse, Surviving Life Partner, and Surviving Spouse.

- Change the marital status

A dropdown menu with a downward arrow on the right. The current selection is "Divorced". The list of options includes: Divorced, Married, Partner, Separated, Single, Unknown, and Widowed.

- Add a comment

Note that if you update the marital status to Divorced, the relationship type will automatically update to "Former Spouse"

If you have additional updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

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Enter any updates to the constituent's employment information on the Employment tab.

How to Do:

Add new employer relationship

Click this button to add a new employer. (If the constituent does not have a current primary employee, you will already be on the add screen and will not have button.)

First check to see if the employer has a record in TAS using the Employer Search box. If the record is found, highlight it and click select.

If the employer does not have a record, you can enter the Employer information in the fields displayed.

The screenshot shows the 'Biographic Update Request' form with the 'Employment' tab selected. The form is divided into two main sections: 'New Employer Relationship' and 'Current Primary Employer Relationship'.

New Employer Relationship:

- Employer Search: [Text input field]
- Employer Name: [Text input field with value 'Buckeyes R Us']
- Employee Relationship Type: [Dropdown menu with value 'Employee']
- Employer Relationship Type: [Dropdown menu with value 'Employer']
- Relationship Start Date: [Date picker with value '9/15/2014']
- Relationship End Date: [Date picker]
- ☒ Primary Employer Relationship ?
- Job Title: [Text input field with value 'CEO']
- Job Category: [Dropdown menu]
- Job Dept/Branch/Division: [Text input field]
- Employee's Work Address: [Text input field]
- Address Type: [Dropdown menu with value 'Business']
- Country: [Dropdown menu with value 'United States']
- Address: [Text input field with value '123 Buckeye Way']
- City: [Text input field with value 'Columbus']
- State: [Dropdown menu with value 'Ohio']
- ZIP: [Text input field with value '43210']
- ☐ Set as primary address (This is the preferred address.)
- Phone: [Text input field]

Current Primary Employer Relationship:

- Lookup ID: [Text input field with value '90001346']
- Employer Name: [Text input field with value 'The Ohio State University Alumni Association Inc']
- Relationship Start Date: [Date picker]
- Relationship End Date: [Date picker]
- ☐ Primary Employer Relationship ?
- ☒ Former Employer ?
- ☐ Employee retired ?

Existing employment information

If the constituent has a current primary employer relationship on the record you can:

- Update the start date
- Add an end date to indicate when the person stopped working for organization listed
- Uncheck the Primary Employer flag
- Indicate that it is a former employer
- Indicate that the employee has retired from the organization listed
- Update or add a job title
- Update or add a job category
- Update or add the branch or division the employee works for at the existing organization
- Update or add the employee's work address. Note that this should be the specific location where the employee works which may be different from the organization record's primary address in TAS.
- Change the primary flag on the employee's work address
- Mark the employee's work address as not valid
- Add or update a work phone number
- Add a comment about the information source for the address
- Add additional comments or instructions.

The screenshot shows the 'Biographic Update Request' form with the 'Employment' tab selected. The form contains the following fields and options:

- Buttons:** Personal, Address, Email, Phone, Spouse Relationship, **Employment**, Relationships - Other Individual.
- Action:** Add new employer relationship.
- Instructions:** If the employer hasn't changed but the person has a new job title, or business address at their current company, type over the existing information for the current employer. If the current employer has changed, check the Former Employer check box below and click on the Add a new employer relationship button.
- Section:** Current Primary Employer Relationship
- Fields:**
 - Lookup ID: 90001346
 - Employer Name: The Ohio State University Alumni Association Inc
 - Relationship Start Date: [Calendar icon]
 - Relationship End Date: [Calendar icon]
 - ☒ Primary Employer Relationship ?
 - ☐ Former Employer ?
 - ☐ Employee retired ?
 - Job Title: Mascot
 - Job Category: [Dropdown menu]
 - Job Dept/Branch/Division: [Text field]
 - Employee's Work Address: [Text field]
 - Country: United States [Dropdown menu]
 - Address: 2200 Olentangy River Rd, Longaberger Alumni House [Text field]
 - City: Columbus [Text field]
 - State: Ohio [Dropdown menu]
 - ZIP: 43210-1035 [Text field]
 - ☒ Set as primary address (This is the preferred address.)
 - ☐ This is not a valid address for this constituent
 - Information Source Comment: [Text field]
 - Phone: [Text field]
- Notes:**
 - Note:** Enter any additional notes or instructions here. This comment will not display on the constituent record.
 - Comment: [Text field]

OSU Employees

If the constituent is a current OSU employee, you may not update their employment information using this form. A note will appear in **red** at the top of the Employment tab on employee records.

Employment information for OSU employees is maintained by the Office of Human Resources. Employees should submit changes to the employee self-service site or contact their unit's human resources office. Changes made in the HR system are uploaded to TAS every 2 weeks.

The screenshot shows the 'Biographic Update Request' form with the 'Employment' tab selected. The form includes a 'Personal' tab, an 'Address' tab, an 'Email' tab, a 'Phone' tab, a 'Spouse Relationship' tab, and a 'Relationships - Other Individual' tab. A green button labeled 'Add new employer relationship' is at the top. A note states: 'Note: Employment information for OSU employees is maintained by the Office of Human Resources. Employees should submit changes to the employee self-service site or contact their unit's human resources office. Changes made in the HR system are uploaded to TAS every 2 weeks.' Below this, a section titled 'Current Primary Employer Relationship - OSU Employee data must be submitted to HR' contains the following fields: 'Lookup ID:' (90000750), 'Employer Name:' (The Ohio State University), 'Relationship Start Date:' (calendar icon), 'Relationship End Date:' (calendar icon), 'Primary Employer Relationship?' (checked), 'Former Employer?' (unchecked), 'Employee retired?' (unchecked), 'Job Title:' (Mascot), 'Job Category:' (dropdown), 'Job Dept/Branch/Division:' (dropdown), 'Employee's Work Address:' (Country: United States, Address: 2335 Neil Ave, City: Columbus, State: Ohio, ZIP: 43210-3144), 'Set as primary address (This is the preferred address.)' (checked), 'This is not a valid address for this constituent' (unchecked), 'Information Source Comment:' (text area), 'Phone:' ((614) 292-9832), and a 'Note' section for additional notes. At the bottom, there is a 'Submit' button and a 'Cancel' button. A footer note says: 'Questions about this form or other biographic data? Email bioupdate@osu.edu or call (614) 292-2141.'

If you have additional updates, navigate to the appropriate tab.

If you have no further updates, go to step 10.

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Enter any updates to the constituent's individual relationships on the Relationships - Other Individual tab. Examples include children, parents, other relatives, financial advisors, etc.

How to Do:

Search for the related individual's record in TAS and click on the select button.

The individual's name field from TAS will display on the screen.
(You cannot update the related individual's name field here. You would need to go to the related individual's record and submit the name change from there.)

If applicable, enter the relationship start date and/or end date.

Use the drop down box to indicate how the individuals are related to each other.

Enter any additional notes in the comment box.

Biographic Update Request

Personal Address Email Phone Spouse Relationship Employment **Relationships - Other Individual**

[+ Add another relationship](#)

Relationships-Other Individuals

Only relationships for individuals already in TAS can be added here.

Search for the related individual's record in TAS:

Note: If record is not found, use the comment box below to request a new record.

Related Individual Title:

Related Individual First Name:

Related Individual Middle Name:

Related Individual Last Name:

Relationship Start Date:

Relationship End Date:

Brutus Buckeye is the:

Al Buckeye is the:

Note: Enter any additional notes or instructions here.
This comment will not display on the constituent record.
(If you are requesting a new record, please include as much information as possible about the constituent.)

Comment:

If the individual already has a relationship on the record, the information from the relationship record will populate on the screen. You can add start dates, end dates or change the relationship type and reciprocal for the existing relationship.

To add additional relationships, click the Add Another Relationship button.

If you have no further updates, go to step 10.

Special Warnings:


Only individuals who already have a record can be added as a relationship using the search feature on this screen. You may use the comment box to enter information about an Organization relationship or an individual not already in TAS or send an email to bioupdate@osu.edu

10 Click the submit button from any tab to complete the update request.

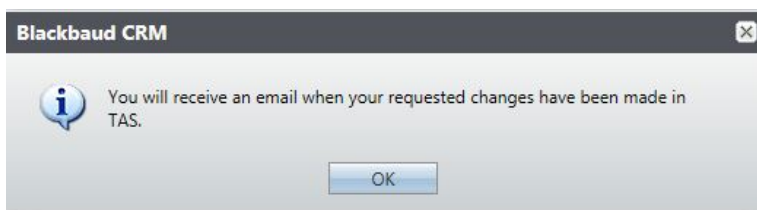
Result:

The following pop up message will appear:

Blackbaud CRM

 Click Ok to submit your changes or cancel to continue updating this record.

If you have additional updates to make to the record, choose cancel and navigate to the appropriate tab. Otherwise click OK and the following message will appear:



The Advancement Records office will review the request and make the updates to TAS. You should receive an email letting you know the update is complete. The typical turn around time is 1-3 business days.

Troubleshooting

Common Problems: If you are not able to navigate to fields toward the bottom of the screen or to the submit button, use the scroll bar on the constituent record.

