**Objective:** To provide business standards for continuity in maintenance of all pledges and pledge payments. To provide up-to-date and accurate information concerning pledges, pledge payments and payment schedules. This policy applies to all types of pledges (i.e. Standard, Payroll Deduction, Bequest Expectancy, etc.).

ANDI will allow pledge payment(s) to be posted to different allocation(s) not listed on the pledge itself. These types of transactions will reduce the balance of the pledge. If the donor requests their allocation(s) to be changed, then modify the pledge. If the donor sends in a pledge payment designated to an allocation different from the original pledge, **do not** modify the pledge. **NOTE: ACTIVE/RECENT TAB WILL BE MODIFIED TO REFLECT THIS POLICY.**

**Requests to Apply Prior Gift(s) to a New Pledge Commitment:** Requests to apply prior gift(s) as a payment(s) to a new pledge commitment will be allowed if the gift(s) was posted within the current or previous fiscal year. The Club Membership office will handle the donor’s club/society memberships to ensure the donor does not receive double credit.

If the gift(s) was posted prior to the current or previous fiscal year, then it is the donor’s decision whether or not to reduce the pledge amount.

**Requests to Apply Pledge Payments to a Payroll Deduction Pledge:** If the pledge payment is to be applied to a payroll deduction pledge, contact the System Payroll Deduction Office.

Exceptions to the above policy must be approved by the Vice President for Advancement Services.
Procedure Note: ANDI will allow pledge payment(s) to be posted to allocation(s) not listed on the pledge itself. These types of transactions will reduce the balance of the pledge. If the donor requests their allocation(s) to be changed, then modify the pledge. If the donor sends in a pledge payment designated to an allocation different from the original pledge without a request to modify their pledge, do not modify. NOTE: ACTIVE/RECENT TAB WILL BE MODIFIED TO REFLECT THIS POLICY.

Ledger vs. Non-Ledger Pledge Modifications: A pledge transaction is modified in one of two ways, depending on the information that needs to be modified. A ledger modification is used to modify transaction information (e.g. allocation, payment amount, recognition credit, associated donors, etc.). A non-ledger modification can be used to add or change minimal details (e.g. pledge status, comment, anticipated match amount, special handling, etc.) or to modify the pledge payment schedule.

When to use the Pledge Status ‘C’ (Cancelled) or ‘I’ (Incomplete): Use the pledge status code of ‘C’ when the donor has sent in notification or contacted the development officer that he/she no longer intends to fulfill his/her commitment. The code of ‘I’ is a code that is applied due to lack of payment.

Ledger Pledge Modifications

1. Before you can perform a Ledger Modification to a Pledge, you must first have the pledge number you wish to modify. Go the entity’s giving summary locate the pledge and write down the pledge number.

2. Ledger Modifications are done within a batch. Open a batch by going to Fiscal, then Gift/Pledge. Select Batch.

3. Select Ledger icon from the edit bar to open the ledger for the batch you created.

4. From within the Batch Ledger, click the Rev/Mod icon on the Edit bar.

5. Click the Modification radio button in the Reversals and Modifications window.
6. Enter the pledge number for the pledge being modified in the Original Receipt box.
7. Select Reason Changed from the dropdown list of options.
8. Enter the date of the reversal.
9. Press the Verify icon on the window to initiate a database check verifying that the pledge number is valid.
10. Once the pledge has been verified, click the OK icon.
11. “Modification” will be indicated across the ledger entry.
12. Click in the field(s) to modify and make corrections. NOTE: If the pledge payment frequency is “Custom”, the Freq. must be changed to another type in order to modify the pledge.
13. Click the Save icon on the edit bar.

**Non-ledger Pledge Modifications**

1. Perform a Lookup to find the Pledge number for the Pledge to be reversed. (Perform an Entity Lookup, drill down to the Giving Summary Window, locate the Pledge in the Transaction List and make a note of the Pledge number—the Pledge number is displayed beside the Date in the Transaction List, as well as on the header of the Primary Pledge Detail Window.)
2. To modify the pledge, go to Fiscal menu on the menu bar.
3. Select Gift/Pledge, then Primary Pledge.
4. On the Primary Pledge window, enter the pledge number, then click OK icon.
5. Modify the pledge information as necessary (e.g. pledge status).
6. Click the Save icon on the Edit bar.
Non-ledger Pledge Payment Schedule Modifications

1. To modify the pledge payment schedule, Go to the Fiscal menu from the menu bar.
2. Select Gift/Pledge and Payment Schedule.
3. Modify the payment schedule, including payment amounts or payment dates for any unpaid pledge payment. ANDI will automatically adjust the pledge schedule when you make a change.
4. Click the Save icon on the Edit bar.

Adv. Services Policies & Procedures