Engaged Generosity

GETTING AND MOVING PATIENT DATA

When grateful patient fundraising works, it's rarely because you have more data—it's because you have the right data, organized well, moving cleanly between systems.

This quick guide breaks down the core information needed to identify and prioritize annual, major, and planned giving prospects, then walks through practical considerations for transferring patient data (matching, duplicate management, field mapping, and compliance).

The goal is simple: build a prospect pipeline you can trust—so your team can spend less time fixing records and more time building relationships that lead to meaningful gifts.

Why the Data Matters

To select and prioritize prospects you'll need a certain set of information. The higher the potential gift amount, the more data points tell a deeper story.

GETTING PATIENT DATA

Annual Giving

Annual Giving prospects are donors, non-donors and patients who've recently visited your institution. Identifying them requires little other than having a name and contact information, combined with certain patient information that informs your program strategy.

Here are some basic pieces of information to collect:

- First Name
- Middle Name
- Last Name
- Address
- Email
- Phone
- DOB
- Patient ID or MRN
- Visit Date
- Visit Location
- Visit Provider
- Visit Specialty
- Visit Inpatient vs. Outpatient

Major Giving

To identify a Major Gift Prospect, you'll need all the same demographic and visit data as an Annual Giving prospect, plus various wealth indicators.

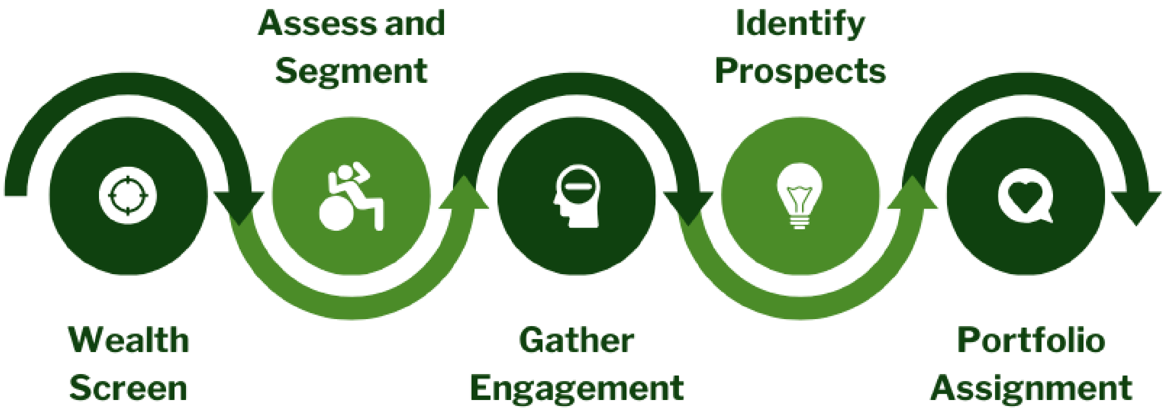
These are often established givers to your organization, but that doesn't rule out Grateful Patient Prospects with capacity who could be extremely appreciative of the care the receive(d) and want to honor their physicians monetarily.

The types of wealth information will vary between organizations depending on size, prospect research capabilities and access to outside tools/services for this information.

Some important data points include:

- Wealth Capacity
- Income
- Assets
- Giving to Other Organizations
- Giving Likelihood Indicators
- Internal Affinity Score
- Internal Donor RFM (recency, frequency, monetary amount)

Combining demographic and wealth information gives a clearer picture of recent picture and their ability to give substantial gifts to the organization.

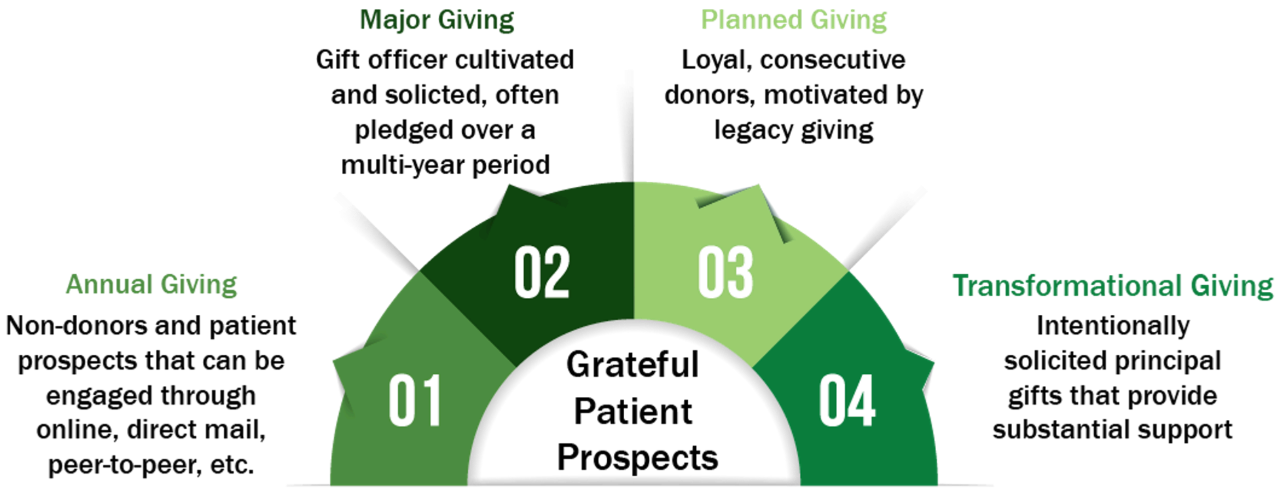


Planned Giving

Planned Giving prospects and donors are often your most loyal. Depending on your program, you may also be looking at higher-level planned gifts that come in the form of a wide array of vehicles.

Planned Gifts require the same or similar information as both Annual and Major Giving, but not all. Identifying these prospects is often about assessing existing data in that align with things that point to a planned giving indicator.

- Planned Giving Indicators
- Age (DOB)
- Internal Affinity Score (specific to planned giving)



MOVING PATIENT DATA

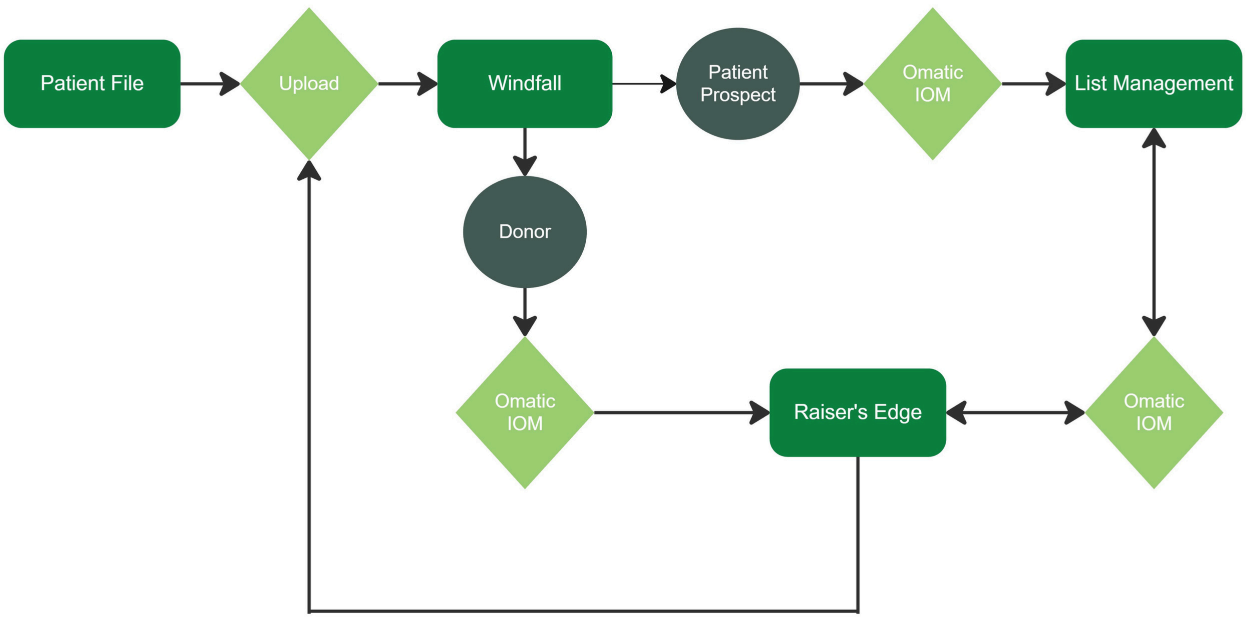
It's important to consider how all of the data critical to prospecting gets from one place or another. It's likely that multiple systems are managing the constituent information, like a CRM, wealth screening or email platform.

Each time you're moving data between systems or through a 3rd party platform, stop and consider what you need:

- Constituent matching using IDs and/or demographics
- Duplicate management plan
- Field to field match-up and how that information will be translated
- If moving PI or PHI, ensure it's compliant with legal and organization standards
- Maintain a standard level of security with who and how data gets moved
- Make a plan to keep the workflow up-to-date through regular data and process audits

1. Make a Map

Once you've thought through the plan, map out all the places the data will live. Begin with where the data originates and keep going until it's everywhere it needs to be.



2. Build Out Steps

Consider how you'll move the information from place to place. The two typical options are by downloading / uploading a flat file or using a software, such as ImportOmatic, to help with the data transfer.

3. Keep It Clean

A data audit schedule is a helpful mechanism to document the tasks needed to ensure processes and data remain correct... in the most efficient way. It measures the task, frequency, owner, due dates and completions. It can be categorized based on how your team is structured.

Your audit schedule is an active document used for managing ongoing data informing your program. It's also a mechanism to set goals for an operations team or others who manage information that informs fundraising performance and strategy. Organize it by category and divide each task among the appropriate stakeholder.

Remember

Every process is just a group of steps. Start with one, then another and build on from there.

1. Lay out the systems
2. Decide how the data will move
3. Plan to keep the information accurate and timely

Efficient and accurate movement of patient fundraising data is essential for healthcare organizations to maximize philanthropic support while maintaining compliance and data integrity. A strategic approach to data management not only optimizes efficiency but also strengthens relationships with patients and donors, fostering a culture of trust and long-term support.

As the healthcare landscape evolves, investing in robust data solutions will remain a critical pillar for sustainable fundraising success.

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