

What to do when Member #1 Dies

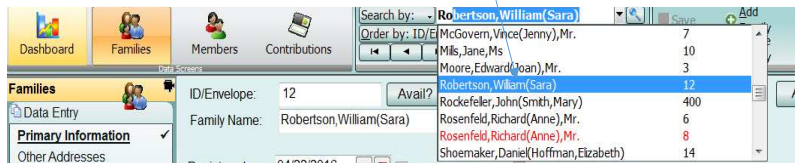
Marking Member #1 Deceased

1. **Families:** Select to begin.



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2. **Search by:** Select the family name and press enter.



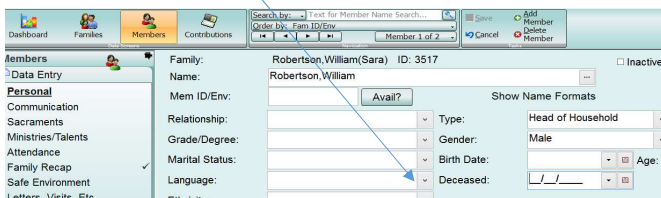
3-3. **Members:** Select the member who has passed away



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3-4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)



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What to do when Member #1 Dies-cont.

Marking Member #1 Deceased cont.

Mark Member Deceased Screen.

Decease Member Section

1. **Change Type from Head of Household to:** Check this box when the Head of Household or member #1 is deceased.
2. Select **Other** from the drop down list.
3. **Add Entry of Deceased to Sacraments List:** If the funeral is at your parish, you may want to check this box to continue with adding the service information..

Mark Member Deceased

Deceased Member: Robertson, William

Birth Date: Age:

Deceased: 10/03/2016

Change Type from Head of Household to: Other Relationship:

Add Entry of Deceased to Sacraments List

Survivor Section

4. **Change Name:** Check that the name is the surviving member. Make any necessary modifications to **Mailing Name, Formal Salutation, Informal Salutation** (This section relates to the member not the family).
5. **Change Type from Spouse to:** Select from drop down box, Head of Household.
6. **Relationship:** Select from drop down if using at your parish.
7. **Change Marital Status to:** Select from drop down box, Widowed.

Survivor: Robertson, Sara

Change Name: Robertson, Sara

Mailing Name: Sara Robertson

Formal Salutation: Sara Robertson

Informal Salutation: Sara

Change Type from Spouse to: Head of Household Relationship:

Change Marital Status to: Widowed

What to do when Member #1 Dies-cont.

Marking Member #1 Deceased cont.

Family Name Section

8. **Change Family Status to:** Select appropriate status from drop down list if using status in your parish.

9. **Change Family Name:** Select the drop down box.

Family Name: **Robertson,William(Sara)**

Change Family Status to: ▼

Change Family Name: Robertson,William(Sara) ⋮

Mailing Name: William Robertson

Formal Salutation: William Robertson

Informal Salutation: William & Sara

Family Name Screen

4-1. **Last Name:** Remove deceased last name and replace with survivor's last name, if different.

5-2. **First Name:** Remove deceased first name and replace with survivor's first name.

6-3. **Spouse Last Name:** Delete spouse last name.

1-4. **Spouse First Name:** Delete spouse first name.

2-5. **Recalculate:** Is used if the **Name** or **Mailing address** or **Salutations** were modified. They will display *** (three asterisks) to indicate a modified name. Use the **Recalculate** button to resolve customizations that were made.

3-6. **Apply/OK:** Select to complete this screen

4-7. **Save:** Select on Mark Member Deceased Screen

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Family Name

Information for the Head of Household:

Last Name: Robertson

First Name: Sara

Title: ▼

Suffix: ▼

Information for the Spouse:

Last Name:

First Name:

Title: ▼

Maximum Characters: 100
Characters Remaining: 86

Name: Robertson,Sara

Mailing Name: Sara Robertson Recalculate

Formal Salutation: Sara Robertson Recalculate

Informal Salutation: Sara Recalculate

Apply/OK Cancel

What to do when Member #1 Dies-cont.

Marking Member #1 Deceased cont.

Members screen as it appears after the member #1 has been marked as deceased.



Notice that the Name is now shown in **Red**.

The **Deceased Box** is checked.

The **Type** is no longer Head of Household but is now **Other**.

The **Deceased Date** is displayed shown.

A screenshot of the member profile form for 'Robertson, William'. The form includes the following fields and values:

- Family: Robertson, William ID: 678
- Name: Robertson, William (text is red)
- Mem ID/Env: (empty) with an 'Avail?' button
- Relationship: Husband
- Type: Other
- Grade/Degree: (empty)
- Gender: Male
- Marital Status: Married
- Birth Date: 10/10/1963
- Age: 52
- Deceased: 10/03/2016
- Ethnicity: (empty)

Additional features include a 'Deceased' checkbox (checked), an 'Add Documents' button, and a 'Show Name Formats' link.

Continue on to Memorial Section (page 44) – this is optional.

What to do when Member #2/ Spouse Dies

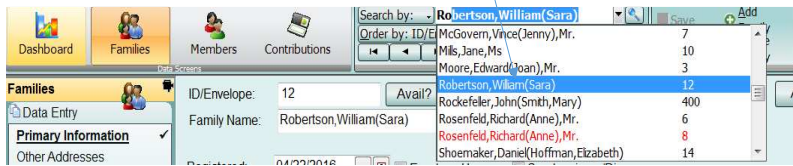
Marking Member #2/Spouse Deceased

1 **Families:** Select to begin.

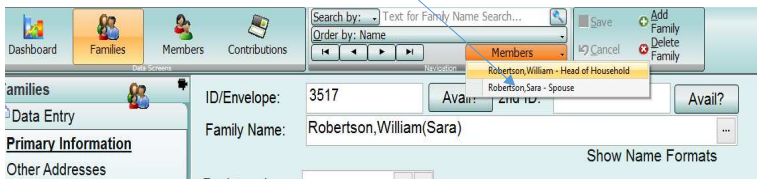


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2. **Search by:** Select the family name and press enter.



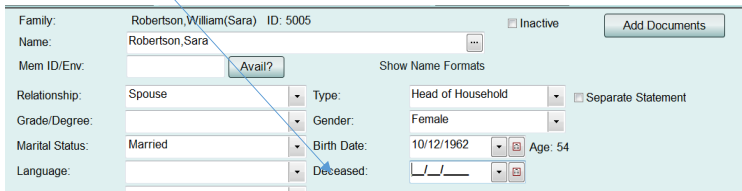
3. **Members:** Select the member who has passed away



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4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)



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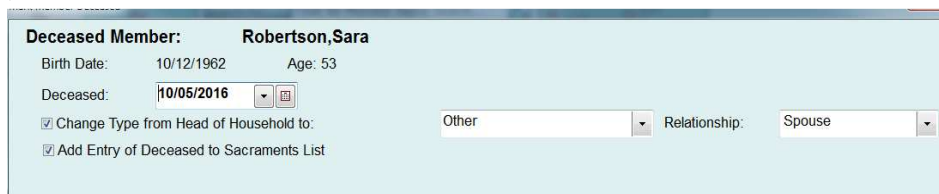
What to do when Member #2/Spouse Dies-cont.

Marking Member #2/Spouse Deceased cont.

Mark Member Deceased Screen.

Decease Member Section

1. **Change Type from Head of Household to:** If Member #2 is designated as Head of Household in your parish, be sure to **click this box**. This value should always be **other** for the deceased member.
2. Select **Other** from the drop down list.
3. **Add Entry of Deceased to Sacraments List:** If the funeral is at your parish, you may want to check this box to continue with adding the service information..



Deceased Member: Robertson, Sara

Birth Date: 10/12/1962 Age: 53

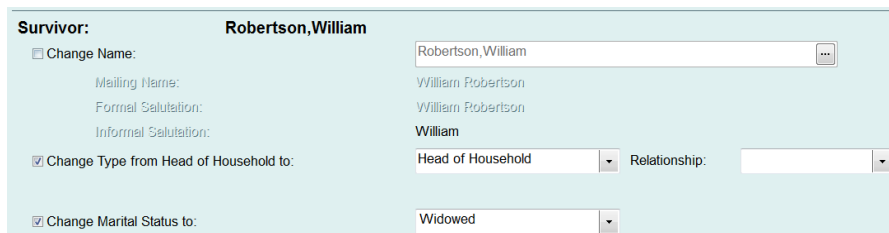
Deceased: 10/05/2016

Change Type from Head of Household to: Other Relationship: Spouse

Add Entry of Deceased to Sacraments List

Survivor Section

4. **Change Name:** Check that the name is the surviving member. Make any necessary modifications to **Mailing Name, Formal Salutation, Informal Salutation** (This section relates to the member not the family).
5. **Change Type from Spouse to:** Select from drop down box, Head of Household.
6. **Relationship:** Select from drop down if using at your parish.
7. **Change Marital Status to:** Select from drop down box, **Widowed**.



Survivor: Robertson, William

Change Name: Robertson, William

Mailing Name: William Robertson

Formal Salutation: William Robertson

Informal Salutation: William

Change Type from Head of Household to: Head of Household Relationship:

Change Marital Status to: Widowed

What to do when Member #2/Spouse Dies-cont.

Marking Member #1 Deceased cont.

Family Name Section

8. **Change Family Status to:** Select appropriate status from drop down list if using status in your parish.

9. **Change Family Name:** Select the drop down box.

Family Name Screen

~~10-8.~~ **Last Name:** Remove deceased last name and replace with survivor's last name, if different.

~~11-9.~~ **First Name:** Remove deceased first name and replace with survivor's first name.

~~12-10.~~ **Spouse Last Name:** Delete spouse last name.

~~5-11.~~ **Spouse First Name:** Delete spouse first name.

~~6-12.~~ **Recalculate:** Is used if the **Name** or **Mailing address** or **Salutations** were modified. They will display *** (three asterisks) to indicate a modified name. Use the **Recalculate** button to resolve customizations that were made.

~~7-13.~~ **Apply/OK:** Select to complete this screen

~~8-14.~~ **Save:** Select on Mark Member Deceased Screen

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What to do when Member #2/Spouse Dies-cont.

Marking Member #2 Deceased cont.

Members screen as it appears after the member #2 has been marked as deceased.



Notice that the Name is now shown in **Red**.

The **Deceased Box** is checked.

The **Type** is no longer Head of Household but is now **Other**.

The **Deceased Date** is displayed shown.

A screenshot of a member profile form for Sara Robertson. The form includes fields for Family, Name, Mem ID/Env, Relationship, Grade/Degree, Marital Status, Language, Type, Gender, Birth Date, and Deceased. The 'Deceased' checkbox is checked, and the 'Deceased' date is set to 10/05/2016. The name 'Robertson, Sara' is displayed in red. A red arrow points to the 'Deceased' date field, a green arrow points to the 'Deceased' checkbox, and a blue arrow points to the 'Type' dropdown menu which is set to 'Other'.

Family:	Robertson, William	ID: 5005	<input checked="" type="checkbox"/> Deceased	Add Docume
Name:	Robertson, Sara			
Mem ID/Env:	Avail?	Show Name Formats		
Relationship:	Other	Type:	Other	<input type="checkbox"/> Separate Statement
Grade/Degree:		Gender:	Female	
Marital Status:	Widowed	Birth Date:	10/12/1962	Age: 53
Language:		Deceased:	10/05/2016	

Continue on to Memorial Section (next page) – this is optional.

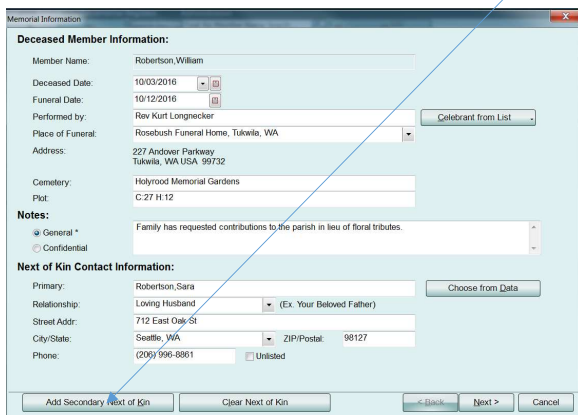
Recording Memorial Information - Optional

Optional Entry

1. **Memorial Information:** Select Yes, if you want to record information regarding the funeral/memorial service and the place of interment. Select No if not recording funeral/memorial information or not tracking donations given in the name of the deceased.



2. **Deceased Date:** Enter the Date of Death
3. **Funeral Date:** Enter the Date of the Funeral or Memorial Service.
4. **Performed by:** Select the Celebrant from the drop down list.
5. **Place of Funeral:** Select Location of Funeral or Memorial Service from the drop-down list.
6. **Cemetery:** Enter the place of final rest.
7. **Plot:** Enter the Location of the Cemetery Plot or Mausoleum, if known.
8. **Notes:** Enter a note or notes if desired.
9. **Primary:** Enter Next of Kin, check drop down list for immediate family.
10. **Relationship:** Select appropriate value from drop down list.
11. **Street Address:** Add the address for Next of Kin. (This is extremely important if not an immediate family member).
12. **City/State:** Select from drop down list.
13. **Zip:** Select the correct Zip Code.
14. **Phone:** Enter a contact phone for the Next of Kin.
15. **Add Secondary Next of Kin:** If you wish to record another "Next of Kin" selection of the button will save the first entry and clear the Next of Kin section for secondary entry.

A screenshot of a web form titled "Memorial Information". It is divided into two main sections: "Deceased Member Information" and "Next of Kin Contact Information".
Deceased Member Information:
- Member Name: Robertson, William
- Deceased Date: 10/03/2016
- Funeral Date: 10/12/2016
- Performed by: Ray Kurt Longnecker (with a "Celebrant from List" button)
- Place of Funeral: Rosebush Funeral Home, Tukwila, WA
- Address: 227 Andover Parkway, Tukwila, WA USA 99732
- Cemetery: Holyrood Memorial Gardens
- Plot: C-27 H-12
- Notes: Family has requested contributions to the parish in lieu of floral tributes.
Next of Kin Contact Information:
- Primary: Robertson, Sara (with a "Choose from Data" button)
- Relationship: Loving Husband (with a dropdown menu showing "(Ex. Your Beloved Father)")
- Street Addr: 712 East Oak St
- City/State: Seattle, WA (with a dropdown menu)
- ZIP/Postal: 98127
- Phone: (206) 996-8861 (with a "Unlisted" checkbox)
At the bottom of the form are buttons: "Add Secondary Next of Kin", "Clear Next of Kin", "< Back", "Next >", and "Cancel".

Memorial Donations Entry - Optional

Optional Entry

1. **Memorial Fund:** Select the appropriate predefined fund from the drop down selection.
2. **Activity Name:** Select the applicable activity from the drop down selection.
3. **Donor Family:** Using drop down box, select the donor family.
4. **ID/Envelope:** This will populate automatically if the donor is in your database.
5. **Street Address:** Auto-fills if donor is in database. Enter address if donor is not in your parish database. (This is needed for acknowledge cards.)
6. **City/State:** As above.
7. **Zip:** As above.
8. **Date of Donation:** Enter the date the donation was received in the parish.
9. **Donation Amount:** Enter the amount of the donation.
10. **Check:** Enter the check for reference if applicable.
11. **Add Donor:** Select the add donor button to save the entry and clear the screen to process additional donations. You will notice that the gifts appear on the bottom half of the screen.
12. **Next:** When finished adding your donations for this person select the next button. (Note: you can return to this donation page later and enter further gifts if received.)

Memorial Information

Donations:

Memorial Fund: 1 - 14 Church Donations

Activity Name: Church Donation

Donor Family: Swift, Tom(Marilyn)

ID/Envelope: 13

Street Addr: 3508 S Quince

City/State: Olympia, WA ZIP/Postal: 98501-9999

Date of Donation: 10/10/2016

Donation Amount: \$35.00 Check: 9632

List of Other Donors: double click to reload and make changes

Donor Name	Donation Date	Donation Amt	Check Num	Posted	Thank You Printed	Type
Rubble, Barney(Betty)	10/11/2016	\$300.00	963	No	No	Donor
Swartz, Daniel(Kaufman, Bett)	10/11/2016	\$100.00	965	No	No	Donor

Thank You for Memorial Gift Letters – Optional

Optional Entry

1. **Print Thank You.** You may initiate the printing of Thank You letters to the donors simply by checking this box.
2. **Print Letters:** Will take you directly to your reporting section that allows printing of letters and reports.

After the letters have been printed the box titled *Thank You Printed* will change to YES.

Thank You Letters:
If you want to print thank you letters for donations, select from the list of donors and click Print Letters

Donor List:

Print Thank You	Donor Name	Donation Date	Donation Amt	Thank You Printed
<input type="checkbox"/>	Rubble, Barney (Betty)	10/11/2016	\$300.00	No
<input type="checkbox"/>	Swartz, Daniel (Kaufman, Betti)	10/11/2016	\$100.00	No
<input type="checkbox"/>	Swift, Tom (Marilyn)	10/10/2016	\$35.00	No

Buttons: Mark All, Clear All, Print Letters, < Back, Next >, Cancel

Next of Kin Letters - Optional

Optional Entry

3.1. Print Thank You. You may initiate the printing of Thank You letters to the donors simply by checking this box.

4.2. Print Letters: Will take you directly to your reporting section that allows printing of letters and reports.

This letter informs those listed as Next of Kin about the donations received as a memorial for the deceased. After the letters have been printed the box titled **Thank You Printed** will change to YES.



Memorial Information

Next of Kin Letter:
If you want to print a letter to the Next of Kin that shows the donors, select from the list of donors and click Print Letters.



Donor List:

Print on Letter	Donor Name	Donation Date	Donation Amt	Thank You Printed
<input type="checkbox"/>	Rubble, Barney(Betty)	10/11/2016	\$300.00	No
<input type="checkbox"/>	Swartz, Daniel(Kaufman,Betti)	10/11/2016	\$100.00	No
<input type="checkbox"/>	Swift, Tom(Marilyn)	10/10/2016	\$35.00	No

Buttons: Mark All, Clear All, Print Letters, < Back, Next >, Cancel

Posting Memorial Gifts to GL or QuickBooks - Optional

Optional Entry

1. **Print Summary of Posted Information:** Print report if desired.

Export Batch Totals:

2. **Export Totals Information:** If you want to export your gift information to either PDS Ledger or QuickBooks select the appropriate checkboxes and enter the correct path.

Memorial Information

Ready to Post Memorial Information?

Click Finish to post memorial information for the deceased and their donors.

If you do not want to print a report, clear the check boxes.

Print Summary of Posted Information

Export Batch Totals

Export Totals Information To PDS Ledger To QuickBooks

Path for Export File: C:\Users\kittermann\Desktop\Working

QuickBooks Account Names File:

< Back Finish > Cancel