What to do when Member #1 Dies

Marking Member #1 Deceased

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

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

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

4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)
What to do when Member #1 Dies-cont.

Mark 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.

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.
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.

```
<table>
<thead>
<tr>
<th>Family Name:</th>
<th>Robertson, William(Sara)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Change Family Status to:</td>
<td></td>
</tr>
<tr>
<td>9. Change Family Name:</td>
<td>Select the drop down box.</td>
</tr>
</tbody>
</table>
```

**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.
4.4. **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.
4.6. **Apply/OK:** Select to complete this screen
4.7. **Save:** Select on Mark Member Deceased Screen
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.

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.

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

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

4. Enter a date into the **Deceased** field. (If date is unknown enter current date.)
What to do when Member #2/Spouse Dies-cont.

Mark Member Deceased Screen.

Marking Member #2/Spouse Deceased cont.

**Mark Deceased Screen**

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.

### 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**.

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![Deceased Member Screen](image-url)

**Deceased Member**: Robertson,Sara
- **Birth Date**: 10/12/1962
- **Age**: 53
- **Died**: 06/05/2016

- **Change Type from Head of Household to**: Other
- **Add Entry of Deceased to Sacraments List**

![Survivor Screen](image-url)

**Survivor**: Robertson,William
- **Change Name**
- **Mailing Name**: Robertson,William
- **Formal Salutation**: William Robertson
- **Informal Salutation**: William

- **Change Type from Head of Household to**
- **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. **Last Name:** Remove deceased last name and replace with survivor’s last name, if different.

11. **First Name:** Remove deceased first name and replace with survivor’s first name.

12. **Spouse Last Name:** Delete spouse last name.

13. **Spouse First Name:** Delete spouse first name.

14. **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.

15. **Apply/OK:** Select to complete this screen

16. **Save:** Select on Mark Member Deceased Screen
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.

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.
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 number 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.)
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**.
**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*. 
Posting Memorial Gifts to GL or QuickBooks - Optional

Optional Entry

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

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.