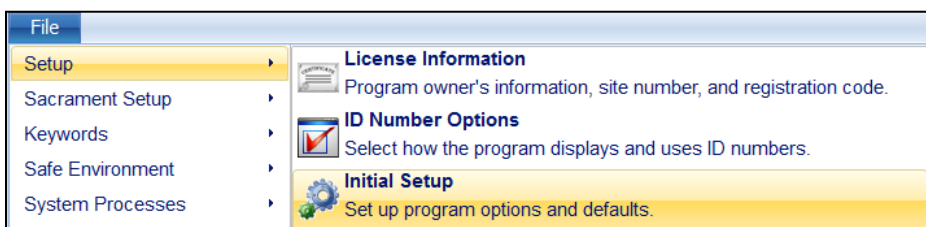


How to update records for a deceased parishioner in the PDS Church Office software

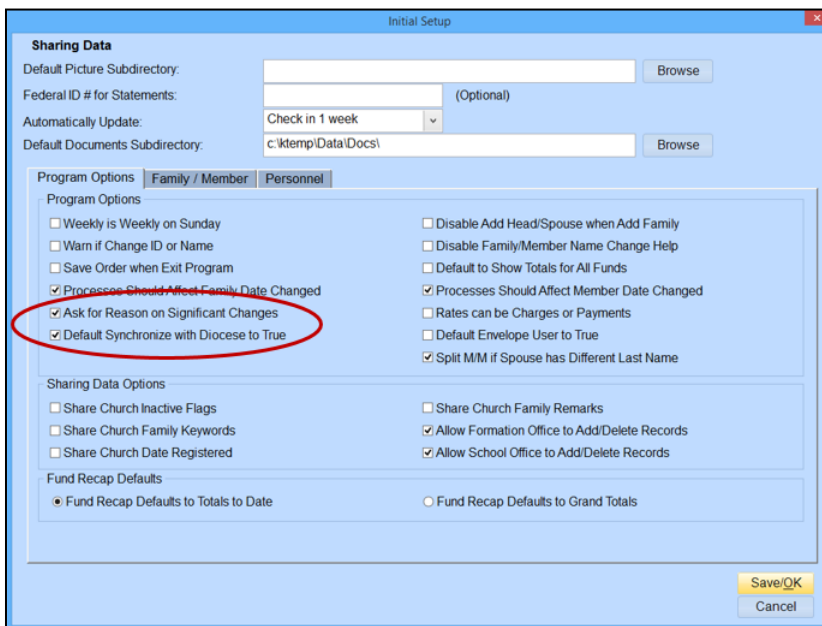
Marking a member as deceased when he/she is the head of household:

It is important that you follow the directions below when deleting deceased individuals from your database. PDS has developed a method for sending this information to the Diocese. It is called the "Reason For Change". Turn this feature on using these instructions.

1. Open Church Office.
2. From the File menu under Setup, click **Initial Setup**.



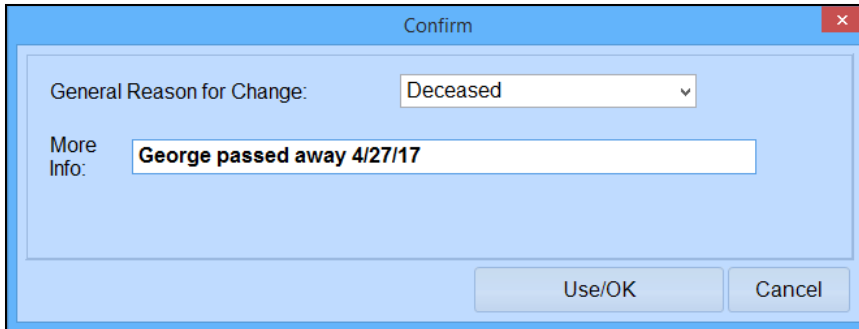
3. Put a check next to **Ask for Reason on Significant Changes**.



4. Please also make sure there is a check next to **Default Synchronize with Diocese to True**.
5. Now, when you mark a record as deceased, the software will ask you for the reason for change and the Diocese will be alerted.

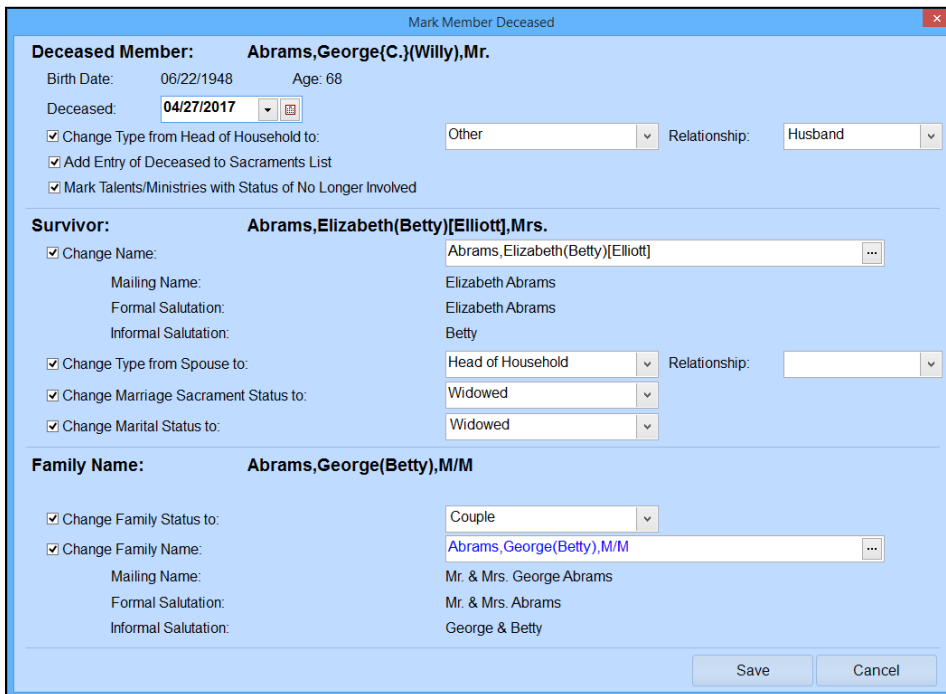
If you intend to keep the record of someone deceased in your database:

1. Locate the member's record.
2. On the Personal window, enter the Deceased date and click **Save**. The reason for change dialog displays for this member change. Select the Reason for Change and enter any additional notes, then click **Use/OK**.



A dialog box titled "Confirm" with a close button (X) in the top right corner. It contains a "General Reason for Change:" label with a dropdown menu set to "Deceased". Below this is a "More Info:" label with a text input field containing "George passed away 4/27/17". At the bottom are two buttons: "Use/OK" and "Cancel".

3. The Mark Member Deceased dialog displays.



A dialog box titled "Mark Member Deceased" with a close button (X) in the top right corner. It is divided into three sections: "Deceased Member:", "Survivor:", and "Family Name:".
Deceased Member: Abrams, George(C.)(Willy), Mr. Birth Date: 06/22/1948 Age: 68. Deceased: 04/27/2017. Change Type from Head of Household to: Other. Relationship: Husband. Checkboxes: Add Entry of Deceased to Sacraments List, Mark Talents/Ministries with Status of No Longer Involved.
Survivor: Abrams, Elizabeth(Betty)(Elliott), Mrs. Change Name: Abrams, Elizabeth(Betty)(Elliott). Mailing Name: Elizabeth Abrams. Formal Salutation: Elizabeth Abrams. Informal Salutation: Betty. Change Type from Spouse to: Head of Household. Relationship: (empty). Change Marriage Sacrament Status to: Widowed. Change Marital Status to: Widowed.
Family Name: Abrams, George(Betty), M/M. Change Family Status to: Couple. Change Family Name: Abrams, George(Betty), M/M. Mailing Name: Mr. & Mrs. George Abrams. Formal Salutation: Mr. & Mrs. Abrams. Informal Salutation: George & Betty. Buttons: "Save" and "Cancel".

4. If needed, change the member's type. For example, if a Head of Household dies, you may want to change them to Adult or Other so the spouse can become the HOH.
5. If needed, change the relationship.
6. If needed, automatically add a sacrament for the member's death. You can add or edit this later.
7. Change the status of the member's current talents and ministries to No Longer Involved.
8. Make any necessary changes to the surviving member. For example, you may need to change the spouse's marital status, type, or relationship. In this example since Betty is the surviving member you would want to change her member type to Head of Household.

9. Make any necessary changes to the family status and name.

Family Name: Abrams,George(Betty),M/M

Change Family Status to: Widowed

Change Family Name: Abrams,Betty,Mrs. ...

Mailing Name: Mrs. Betty Abrams


Formal Salutation: Mrs. Abrams

Informal Salutation: Betty

Save Cancel

10. Click **Save**. This will mark the member as deceased in the upper right corner of their member record.

Family: Abrams,Betty,Mrs. ID: 101 Deceased

Name: Abrams,George{C.}(Willy),Mr. ... 



Useful Information

If you collect donations for the family of a deceased member you can enter those Memorials using the Memorial process.


Instructions when marking the last member of the family as deceased:

1. Locate the member's record.
2. On the Personal window, enter the Deceased date and click **Save**. The reason for change dialog displays for this member change. Select the Reason for Change and enter any additional notes, then click **Use/OK**.
3. The Mark Member Deceased dialog displays.

Mark Member Deceased

Deceased Member: Abrams,Elizabeth(Betty)[Elliott]

Birth Date: 05/21/1949 Age: 67

Deceased: 04/28/2017 

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

Add Entry of Deceased to Sacraments List

Mark Talents/Ministries with Status of No Longer Involved

Family Name: Abrams,George(Betty),M/M

Mark Family as Inactive (all members are now inactive or deceased)

Change Family Status to: Deceased

Change Family Name: Abrams,George(Betty),M/M ...

Mailing Name: Mr. & Mrs. George Abrams

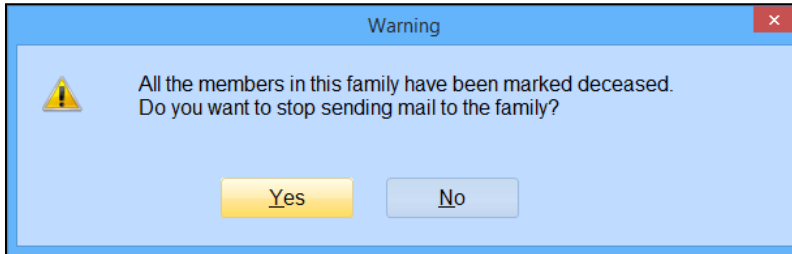
Formal Salutation: Mr. & Mrs. Abrams

Informal Salutation: George & Betty

Save Cancel

4. If needed, change the relationship.
5. If needed, automatically add a sacrament for the member's death. You can add or edit this later.

6. Change the status of the member's current talents and ministries to No Longer Involved.
7. Click **Save**.
8. If this is the last member in a family, you're prompted to stop sending mail. Click **Yes** to mark the Send No Mail option on the family's Primary Information window.



9. The process will mark the family as inactive, however make sure to switch from the member screen to the family screen and un-check the **Sync w/Diocese** box.
10. Fill out the "Reason For Change" pop-up screen, then click **Use/OK**.

If you do NOT intend to keep the record of someone deceased in your database:

NOTE

Do not delete family records for anyone who has made a contribution to CSA in the current year until after April 15th of the following year. (This is in case a contribution statement is requested and to ensure accurate information for the CSA).

1. Click the **Delete Family** button to delete a family record from the database.
2. Fill out the "Reason For Change" pop-up screen, then click **Use/OK**.