

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

Instructions for marking a member as deceased when there is only 1 person or this is the last person in a family:

1. Enter the following on **Address 2** of the Family Record replacing the words "Parish Code" with **your** parish code:
"Parish code: Deceased"
2. Do a sync. **Important Note:** BEFORE you do another sync for this or any other family record, wait a day so the diocese can process your first sync. If today is Friday, please wait until Tuesday before doing another sync.
3. Before proceeding, decide if you plan on keeping the record in the database or not.

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

- a) Enter the date for Deceased on the **Personal** screen of the **Members** page. The program will offer to mark them as Inactive/Deceased.
- b) Click **Yes**. The word Deceased will display in the upper left corner of the screen where the word Inactive usually appears.
- c) The program will then offer to add "Deceased" to the Sacraments list. Click **Yes**.
- d) It will offer to mark all of the talents/ministries as no longer involved. Click **Yes**.
- e) Switch from the member screen to the family screen and check the inactive box.
- f) If you are syncing both active and inactive families, you will need to change the ID number of the family to something outside of the normal range. If the diocesan synchronization process is designed to only synchronize a select range of ID/Envelope numbers; any change to an ID that moves it outside of the normal range will cause it to show up in DioOffice as a deleted record.
- g) Do a second sync.

The screenshot shows the 'Members' screen in the Parish Data System. The family record is for 'Akers, John (Shirley), M/M' with ID 105. The 'Deceased' checkbox is checked and highlighted with a red circle. The 'Personal' screen is selected in the left sidebar. The 'Remarks' field is empty. The 'Keywords' field contains 'Description'. The 'Screen Changed' date is 08/13/2008.

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 the 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.)

- h) Click the **Delete Family** button to delete family record from database.
- i) Do a second sync

Instructions for marking a member as deceased when he/she is the head of household:

1. Follow steps 1-3b from above.
2. Change the deceased person from "head of household" to "other".
3. Switch another family member to "head of household".
4. The last step, if necessary, is to go to the family detail screen and change the family name format to reflect the new head of household. This change will be pushed up to the Diocese through the sync allowing us to change the mailing information for CSA and Faith Magazine.