

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

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

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. Click on the **Setup/Admin** tab and click **Setup Options**
3. Choose **Initial Setup** from the drop-down menu.
4. Put a check next to **Ask for Reason on Significant Changes**.
5. Please also make sure there is a check next to **Default Synchronize with Diocese to True**.
6. 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:

- 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) Un-check the Sync w/Diocese box.
- g) Fill out the "Reason For Change" pop-up screen if requested.

The screenshot shows the 'Members' page in the Parish Data System. The member record for Akers, John (Shirley), M/M (ID: 105) is displayed. The 'Deceased' checkbox is checked and circled in red. The 'Deceased' date is 08/13/2008. The 'Sync w/Diocese' checkbox is unchecked. The 'Reason For Change' pop-up screen is not visible.

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) Fill out the "Reason For Change" pop-up screen.

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

1. Switch another family member to "head of household" and change the deceased person from "head of household" to "other". Check the new HOH, Title so the Mailing Name and Formal Salu. are correct.
2. Fill out the "Reason For Change" pop-up screen.
3. Switch to the deceased members record and follow the steps above.