

How do I handle deceased contacts in PastPerfect?

Version 4.0

There is a time at every institution where a contact passes away, and the question arises on what to do with the deceased contact's record in PastPerfect. PastPerfect strongly suggests that you do not delete a contact record, even if the person is deceased. The record of donations, pledges, volunteer hours, and dues payments of the contact is part of their financial record, as well as a part of the organization's financial record.

A primary concern about keeping deceased contacts in PastPerfect is to avoid sending any future mailings to the deceased. Here are some changes you can make to a contact's record to prevent this from happening:

First, mark the contact as Deceased. To do this, locate the Biography button on the right hand side of the contact's record. At the bottom left hand corner, place a checkmark in the Deceased field. You may also enter the date of death (if known). The checkmark in the Deceased field will prevent Mail Merge letters and labels to be printed for this contact through the Lists & Labels screen.

Second, mark the contact's record as Stop Mail. This will help prevent other types of mailings and reports from the Lists & Labels screen, including exporting the contact's information to Excel, as long as the "Include Contacts with Stopmail" is UNCHECKED on the Lists & Labels screen.

Third, if the Contact is a member, and there is no other person tied to their membership, you can inactivate their membership. Under the Membership section of their contact record, change the option for "Include on Overdue List" from "Yes" to "No." This will ensure that the membership will no longer receive a renewal notice if/when the membership expires, and they will be considered an Inactive member.

If the Contact is tied to a joint membership with another contact record, you can delete the membership from the deceased's record (making sure that notes are included on the record that this happened). You will need to make sure that the surviving Contact on this membership is listed as the Bill To Member on the membership first. All dues payments will still be listed on the surviving Contact's membership screen. You may also want to update the membership name and membership type if necessary.

Lastly, some institutions may find that removing the entire address on the deceased contact's record is an extra precaution. This makes sure that if any labels are printed, or if the contact's information is exported to Excel through Lists & Labels or a report, that no address for this contact will be listed on the record or Excel file. No mailing would be able to go through to this contact because the file lacks an address.

When you remove the address information from the Address, City, State and Zip code fields, the former address will be placed in the address history screen. Notes about what was done should also be included on the record.

If you have further questions about editing deceased contact's records, please call our support office toll-free at 1-800-562-6080 or email support@museumsoftware.com.