



Client Death Workflow 2019—Checklist Report

TASKS	OUTCOMES
1 OFFICE TASKS (STEPS) <i>(due on target date)</i>	
<ol style="list-style-type: none">1 Send Condolences2 Acquire Death Certificate from family3 Update 'Date of Death' field on contact record4 Update Family Name5 Update 'Head of Household'6 Change 'Marital Status' on spouse record7 Move review reminder to spouse8 Change Spouse status9 Move notes to spouse record10 Move open activities to spouse / Delete open activities11 Add membership(s) to surviving family records	Completed >>
2 CLIENT RELATIONSHIP <i>(no due date set)</i>	
<ol style="list-style-type: none">1 Valentine's Day: Set date to two weeks before first Valentines day after spouse's passing. Order Flower arrangement. Schedule delivery2 Surviving Spouse Birthday: Set date to first surviving spouse's birthday after spouse's passing3 Deceased Spouse Birthday: Set date to first deceased spouse's birthday after spouse's passing4 Anniversary: Set date to first marital anniversary after spouse's passing5 Death Date Anniversary: Set date to first anniversary of death after spouse's passing	Completed >> Complete Workflow ■