



TOOLS: STATUS

DATE OF DEATH
FIELD

FAMILY

MEMBERSHIPS

NOTES

Observation: Statistically speaking 100% of clients die. It is important to have a process in place so that when a client passes, there is immediate action. Upon receiving news that someone has passed, Redtail has some general recommendations for developing your own client death procedures.

Directions:

1. Create a 'Deceased' Status in the database.
[MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > STATUS > ADD](#)
2. Change the client's Status from 'Active Client' to 'Deceased'.
[CONTACT RECORD > CONTACT DETAILS > EDIT > STATUS](#)
3. Fill out the 'Date of Death' field on the client's contact record. This will ensure that the contact is removed from the birthday reminders and various reports within the database.
[CONTACT RECORD > CONTACT DETAILS > EDIT > DATE OF DEATH](#)
4. Change the spouse to the new head of household (if applicable).
[FAMILY NAME > SETTINGS WHEEL > CHANGE HEAD](#)
5. Adjust the 'Family Name' to reflect the new household arrangement (if applicable).
[FAMILY NAME > SETTINGS WHEEL > EDIT](#)
6. Add a membership option for 'Deceased Husband/Wife/Spouse'.
[MANAGE YOUR ACCOUNT > MEMBERSHIP OPTIONS](#)
7. Remove the deceased from the family, and add memberships between the deceased and living relatives. This will allow for the relationship to be tracked without infringing on the tax definition of family.
[CONTACT RECORD > 'MORE' ON LEFT MENU > MEMBERSHIPS > ADD > LINKED CONTACT](#)
8. Remove the Client Review Date from the deceased client's record. If the client's spouse is an Active Client as well, add date to new head of household's contact record.
[KNOW YOUR CLIENT > CLIENT REVIEW > EDIT](#)
9. Add a Note to the deceased contact record of all changes.
[CONTACT RECORD > QUICK ADD \(+\) > NOTE > CHAIN-LINK ICON](#)



10. Check open activities on the deceased contact record.
[CONTACT RECORD > ACTIVITIES > COMPLETE/DELETE/EDIT](#)

Result: By updating the contact record with information about the client's passing, you ensure that your communications will be sincere to their loss. For best practice, Redtail recommends automating a part of this process by using automatons and workflows like the ones included here.

Helpdesk Link: <http://bit.ly/howtoRTU>



Client Death Automation

TRIGGER EVENT:

→ Contact Status Changed

AUTOMATION ACTION:

→ Action Type: **Link Workflow from Template**

→ Action Item: **Client Death Workflow**

IF ALL CONDITIONS TRUE:

→ Contact Status → Equal to: → **Deceased**

Client Death Workflow

***Recommended to use with Automations**
Target date = Date Workflow is created

STEPS TASKS

1 OFFICE TASKS *(On target date)*

- Send condolences
- Acquire death certificate from family
- Update 'Date of Death' field on contact record
- Update 'Family Name'
- Update 'Head of Household'
- Change 'Marital Status' on spouse record
- Edit 'Client Review Reminder' and add to spouse's contact record
- Change spouse's Status
- Move/link notes to spouse record
- Move open activities to spouse
- Add Memberships to surviving family records

OUTCOMES

- Surviving Spouse >> Surviving Spouse Relationship
- No Surviving Spouse >> Surviving Beneficiary Relationship

2 SURVIVING SPOUSE RELATIONSHIP *(No due date set)*

- Valentine's Day
- Surviving Spouse Birthday
- Deceased Spouse Birthday
- Marital Anniversary

- Completed >> **COMPLETE WORKFLOW** ■

3 SURVIVING BENEFICIARY RELATIONSHIP *(No due date set)*

- Date of Death Anniversary
- Deceased's Birthday

- Completed >> **COMPLETE WORKFLOW** ■

**All of Redtail's best practice recommendations in these "How to Handle" documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*