FamilyLink

Name	Relation	Role
Doe, John		
Doe, Joseph		
Doe, Jill		

Move Up   Move Down

I=Informant,PP=Primary Purchaser, P=Purchaser,
S=Spouse,(H)PB=Pallbearer, D=Dec.

Invite to FamilyLink

In order to generate a link for a case you need to enter a name in Family/Friends and include an email address. Once you select a name, you'll notice you have the option to "invite to FamilyLink." When you click this button, an email will automatically send to your family member for them to register.

After sending the link to a family member a link icon will appear next to their name. This way you can keep track of who has access. You have the ability to edit FamilyLink access if you would need to revoke it.

Name
Doe, Jane
Doe, Pam

FamilyLink URL Options

Resend FamilyLink Invitation

View Link in Default Browser

Copy Link To Clipboard

Username registered

User has not yet registered

Copy Username to Clipboard

Reset Account Username and Password

Revoke FamilyLink Access

Move Up   Move Down

I=Informant,PP=Primary Purchaser, P=Purchaser,
S=Spouse,(H)PB=Pallbearer, D=Dec.

☑ Client's Spouse   ☑ Next of Kin
☐ Informant   ☐ Executor
☑ Purchaser   ☑ Aftercare
☐ Additional Purchaser

Edit FamilyLink Access

Employee Excuse

The Family's View

The link will open a webpage that will display the Summary of information entered so far. You'll notice on the left; a checklist of what information needs to be completed **(1).** The Arrangement information will be available for the family to see where and when the arrangement will take place **(2).** Lastly, there is a Correspondence window **(3)** that will allow you and the family member to send messages back-and-forth. The Funeral Directors name and phone number will also display in the top right corner in case they need to be contacted by phone.

Things to take note of:

1. The only access to the link is from the email to keep this private.
2. You can invite other family members but an email has to be present
3. After the first time through FamilyLink, it loads to the Summary
4. Family can upload docs/photos

FamilyLink in SRS

By accessing FamilyLink in SRS, you can view all the information that was provided by a family member. You have the ability to lock a case from FamilyLink or lock an obit so the family cannot make changes once submitted **(1).** The task list for the family is present, so you can view what needs completed **(2).** You can access VFiles from this display **(3).** The obituary supplied by the family will appear in the middle panel **(4).** On the right-hand side is where you can respond and send messages to the family **(5).**

Things to take note of:

1. When you send the family a message in Procession, they get an email to open message in FamilyLink
2. When family sends you a message, you are notified on the Dashboard (red alert button) and it will ping you on mobile.9 app.
3. Funeral Directors can upload doc/photos. You can manage what doc/photos are visible in FamilyLink through Virtual Files
4. When the family is finished editing the obit, on FamilyLink side, they click "Submit Final Copy". This prevents them from editing. You can also Lock/Unlock the obit in Procession with the checkbox "Lock Obit on FamilyLink".
5. You can Lock/Unlock the ability for the family to edit the info to change the status of Read Only by checking the box for "Lock Case on FamilyLink".
6. In FamilyLink, the Summary page lists the necessary missing details at the top left.
7. You can edit the Assigned Family Tasks in Settings -> FamilyLink -> New - then add task and confirm it's consistent for all of your locations.
8. If you right click on the left side navigation buttons (FamilyLink, Family/Friends), it will Pin for a shortcut
9. If there is an issue with a registered family member, by going to their name in Family/Friends and clicking on the Edit FamilyLink button, you can revoke their access.