

How To Successfully Migrate Your Data From Halcyon to Gather

	Specify and Assess Your Migration Needs When switching to Gather, assess what historical data you need to be migrated to the new system using Page 2 in this guide. Please note: because you're moving to an entirely new system, your migrated data will be displayed differently in Gather, and will take some time to get used to.
	Establish a Cut-Off Date From Your Old System Work with your new account manager at Gather to establish a cut-off date where your team will stop entering cases in Halcyon, and begin entering new cases in Gather. We do not migrate multiple times, so plan accordingly with this date, and be sure to get your trainings completed in a timely manner.
	Request a CSV Export + File Dump From Halcyon Communicate with your Halcyon account manager and request a complete CSV export of your data, as well as a case file dump. Once you receive the export, forward the CSV export to your new account manager at Gather. This step is crucial, and requires your participation to obtain the required data from Halcyon.
	Be Patient, Data Migration Takes Time + Effort Data migration requires your collaboration. If you commit to completing this project, data migration can be completed within 2-4 business weeks. The timeline is based upon several factors, which can include receiving your CSV export, the size of your migration and response time from your previous vendor; and can not be finished until you stop using your old system.
	Review + Validate Your Migrated Data Our team will conduct a mini migration of approximately 15 cases. We need you to review the mini migration and validate the data being migrated from Halcyon to Gather. Once our data team has your approval, we'll complete the rest of the migration and ask you to review one last time. And just like that, you're ready to go!

What Data Should You Migrate From Halcyon to Gather?

Yes, We Can Do That



Case Data + Vitals

Includes case info for migrated cases (death certificate info, case number, case type, creation date, death date, case name, SSN, gender).



Custom Case Notes

All custom notes for a specific case are migrated as one consolidated custom note that is attached to the respective case in Gather.



Acquaintances or Helpers

Includes and syncs contact info for all related acquaintances or helpers for a particular case (helper name, helper email, helper phone, relationship to decedent, and full address).

Yes, But Please Note



Case Financials

Includes contracts and logged payments for each case. A digital PDF of the case's existing contract or statement is attached to the case's files in Gather.



Case Files

If Gather receives the case files in the data export from Halcyon, and those case files have a unique identifier that can be associated back to each of their respective cases, then our team can migrate the case files into Gather.

Unable to Migrate



Existing Accounts Receivable

Includes any existing cases that still owe on their statement or contract.



Case Events

Includes events tied to a specific case such as the arrangement meeting, scheduled funeral services, scheduled viewings, and more.



Rolodex Information

Organizes rolodex info to store contact info for individuals/organizations. Halcyon doesn't provide a direct export for this.