

How To Successfully Migrate Your Data From SRS to Gather

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|  | 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 SRS, 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 One Complete Data Backup From SRS Communicate with your SRS account manager and request a complete backup file of your data, including rolodex info and case files. Once you receive the export, forward the data backup to your new account manager at Gather. This step is crucial, and requires your participation to obtain the required data from SRS. |
|  | 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, including receiving your data backup, the size of your migration; 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 SRS 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 SRS 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).



Rolodex Information

Includes and organizes rolodex info to store contact information for individuals or organizations that you're working with in the system.

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

You'll need to explicitly request that SRS includes all case files in the original backup export that is sent over.



Case Events

Includes events tied to a specific case such as the arrangement meeting, scheduled funeral services, scheduled viewings, and more. They will **not** be natively migrated to each case, but all historical case events will be available via a case event report that is uploaded to the document library for locations to access.

Unable to Migrate



Existing Accounts Receivable

Includes any existing cases that still owe on their statement or contract. We recommend that you collect, close out, or manually move your current Accounts Receivable.