# 502 Maintaining Administrative Records

## 502 MAINTAINING ADMINISTRATIVE RECORDS

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### 502.1 Required Forms:

The following forms shall be used to ensure the proper administration of cemeteries, columbarium,and mausoleums:

1. Lot or Vault Card
2. Sales Contract
3. Certificate of Ownership
4. Application to Erect a Memorial
5. Original Entry Form
6. Interment Card

### 502.2 The Lot or Vault  Card:

Lot and Vault Cards shall be maintained for each cemetery lot, vault, or niche in order to allow cemetery management to monitor inventory, including sold grave sites, unsold grave sides, sold vaults, unsold vaults, lot or vault ownership, internments, and memorialization.

**Procedure:**

A) The reference number of the original sales document should be placed on the card to simplify locating the original sales document.

B) The use of a 5” x 8” Lot or Vault Card is recommended.

## 502.3 The Sales Contract:

A sales contract reflecting the purchase of the right of internment (burial) in a grave, crypt, vault, or niche shall be executed with the purchaser on the approved Archdiocesan form.

**Procedure:**

A) The Sales Contract is the first formal contract between the purchasers and the cemetery and establishes a long term, legal relationship between the purchaser and the cemetery.

B) The Sales Contract should include:

- The name of the parish and/or cemetery as the seller of the interment right.
- The contract number (a sequential numbering system should be used to prevent unauthorized sales).
- The purchaser’s name(s), address, and phone number.
- The date of the agreement.
- The location of the lot or vault in the cemetery, columbarium or mausoleum.
- Purchase price.
- Payment terms, including financing.
- Signatures of parties to the contract.
- Any required statutory disclosures

C) A Sales Contract can also be used for the sale of additional products, such as memorials, and casket protection such as vaults, grave boxes or grave liners.

D) A Sales Contract for additional products should identify the type of product, the service to be provided, the costs and financing.

E) At least two copies of each Sales Contract should be made.  Once the contract is signed, one copy should be given to the purchaser and at least one copy should be retained by the cemetery.

F) Sales contracts should be filed by contract number. For ease of reference, the contract number should be included on other records.

G) The standard form sales contract and any updates to it are to be reviewed by legal counsel for the Archbishop.

## 502.4 Cemetery Certificate of Ownership Form:

A Cemetery Certificate of Ownership Form, a legal document assigning the interment right in a specific location to a specific individual or individuals, shall be executed on an Archdiocesan approved form.

**Procedure:**

A) A numbering system should be used in recording the Certificate of Ownership forms (either the same number as the original sales contract or a separate numbering system that is consistently used).

B) The Certificate of Ownership is a legal document for which there must be a record. One copy of the Certificate should be provided to the purchaser, while at least one copy should be retained by the cemetery.

C) The form of the Certificate must be reviewed and approved by legal counsel for the Archbishop.

## 502.5 Application to Erect a Memorial:

An Application to Erect a Memorial must be submitted and approved by the cemetery before a memorial from an outside dealer may be installed.

**Procedure:**

A) The Application to Erect a Memorial provides cemetery management the ability to control memorialization performed in the cemetery by an outside dealer.

B) This form must be completed by outside memorial dealers and approved by cemetery management.

C) The form should be used by cemetery management to:

- Control quality, size and design of memorialization
- Control work scheduling
- Monitor work done by third parties and ensure appropriate insurance
- Charge appropriate administrative fees
- Update cemetery records concerning grave memorialization

D) The Application must include a specific description of the memorial.

F) The application should be signed by the owner of the interment rights and by the person supplying the memorial.

E) Cemetery management should approve the memorial application in writing, if the memorial is consistent with the cemetery's rules and regulations.

F) Without prior written approval, outside contractors are not permitted to erect a memorial.

G) All outside contractors must provide a written certificate of insurance naming the Parish or Cemetery as additional insured prior to commencing any work.

H) A numbering system should be used in recording the Applications (either the same number as the original sales contract or a spate numbering system that is consistently used, such as consecutivelynumbering each Application). All Applications and related documents must be accounted for by cemetery management and filed in such a way that future retrieval is possible.

## 502.6 Original Entry Form:

An Original Entry Form document shall be used to record information regarding internment.

**Procedure:**

A) An original and two copies shall be made. One of the copies is retained by cemetery management. One of the copies is used by the cemetery's operations crew in preparing for the interment. And the final copy is given to the family as a receipt.

B) This form is not meant to replace the sales contract, which sets out the agreement between the parties and is a legally binding agreement. The original entry form is an internal document to provide a format for collecting information about the interment and any related fees.

C) A numbering system should be used in recording the Original Entry Form (either the same number as the original sales contract or a space numbering system that is consistently used, such as consecutively numbering each Original Entry Form). All Original Entry Forms and related documents must be accounted for by cemetery management and filed in such a way that future retrieval is possible.

D) A blank copy of the form is available through the NCCC.

## 502.7 The Interment Card:

An interment card shall be completed whenever a burial occurs in the cemetery or an urn is interred in a columbarium.

**Procedure:**

A) The primary copy of this card is filed alphabetically by the last name of the deceased.

B) For reference, a second copy may be filed may be filed by document number, providing a reference back to the initial sales contract, or chronologically, so that the number of interments in a particular period can be tracked.

C) The interment card is used in conjunction with the lot or vault card. The burial location or vault niche identification on the interment copies provides the reference information needed to access the appropriate lot or

vault card.

D) The use of a 2 ¼” x 3” interment card is recommended.

## 502.8 Rules and Regulations:

Every cemetery, in conjunction with its affiliated parish, shall maintain rules and regulations that outline the responsibilities, privileges, restrictions, etc. for all parties that have an interest in the cemetery or columbarium.

**Procedure:**

A) All legal documents (sales contracts, right of burial certificate, etc.) should reference the rules and regulations.

B) Cemetery management must be able to demonstrate that it advised interested parties that the cemetery rules and regulations are available for their review or that it provided a copy of the rules and regulation to such parties.

C) A well drafted set of rules and regulations can protect the cemetery from many legal difficulties while helping to ensure a harmonious relationship among all users of the cemetery.Legal counsel should review rules and regulations.

## 502.9 Recording Transfer of Burial Rights:

The transfer of interment rights from one individual to another is an important procedure that shall be addressed in the cemetery’s rules and regulations and documented on forms reviewed and approved by legal counsel.