



Using Split Household Tool to Move Adult Donors to Their Own Family Record in MP



Note: This will move an Adult donor into their own family record in MP. This will allow you to set him/her as Head of Household while still using the same address as his/her parent.

These instructions do not cover moving the individual to a household in a different parish. Email ist@eriercd.org if you need to also switch parishes.

1. Click **Contacts**, search for the departing member and click to open his/her record.
2. Click the **Tools** button and choose **Add/Edit Family**.
3. Make note the current address.
4. Click the **Close** button and then the **Proceed** button to close the Add/Edit Family tool.
5. Click the **Tools** button and choose **Split Household** tool.
6. Select the departing member from the **Departing Member** drop down.
7. Click the **New** button to create the new household address and enter the address you noted during step 3 above.
8. Select **Other** from the **Departure Reason** drop down menu.
9. Click the **Split Household** button and then the **Close** button. The Contact record appears.
10. Click the **Edit Record** button; enter a **Legacy Salutation** and click **Save**.
11. Set up a **Donor Record** if one doesn't already exist:
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. You may also change the **Participant type** to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Click the **Save** and then **Close** buttons.
12. Enter an envelope number if desired.
 - a. Scroll down until you see the **Donor** field and click the **blue chain link**.
 - b. Click **Edit Record** and add an envelope number.
 - c. Click **Save**.



Using Split Household Tool to Move a Family Member to a New Address.



Follow these instructions when an adult child moves out of his parents house into his own home/apartment or in the case of divorce when one spouse is moving to a new residence.

These instructions do not cover moving the individual to a household in a different parish. Email lst@eriercd.org if you need to also switch parishes.

1. Click **Contacts**, search for the departing member and click to open his/her record.
2. Click **Tools** and choose **Split Household**.
3. Select the departing member from the **Departing Member** drop down.
4. Click the **New** button to create the new household address and enter pertinent address information.
5. Select a **Departure Reason** from the drop down menu.
6. **Important note for Marriage, Separation and Divorce:**
 - a. Click in the **Spouse** drop down menu and select the Spouse. This will **create or update** the "Relationship" tab in the Contact record for both the departing member and the spouse.
 - b. If children are **NOT** departing, uncheck the **Create Records for Children** box.
 - c. If children **ARE** departing, keep the **Create Records for Children** box checked to create a "non-custodial" Other Household record for each child.
7. If other household members are moving too, double click on his/her name under the Household Members heading to move them under the **Departing Members** heading.
8. Make changes in the **Departing Members** list if necessary:
 - **Last Name:** Click on the last name and edit it as needed.
 - **Household Position:** Click the current household position and choose from the menu.
9. Click the **Split Household** button and then the **Close** button.
10. Click the **Edit Record** button and edit the **Legacy Salutation** field if necessary
11. Set up a **Donor Record** if one doesn't already exist:
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. You may also change the **Participant type** to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Click the **Save** and then **Close** buttons.
12. Enter an envelope number if desired.
 - a. Scroll down until you see the **Donor** field and click the **blue chain link**.
 - b. Click **Edit Record** and add an envelope number.
 - c. Click Save.



Using Split Household Tool to Move a Contact to Another Household Record in Ministry Platform



These instructions are commonly used when a parishioner moves out of his or her parent's home and into a new spouse's home. These instructions contain a slight workaround which is necessary until we rectify all of our duplicates.

These instructions do not cover moving the individual to a household record in a different parish. Email ist@eriercd.org if you need to also switch parishes.

1. Click **Families** and open the household about to receive the new member.
2. Click **Tools** and choose **Add/Edit Family** tool.
3. Add an ***** at the beginning of the street address. and click **Save**. This will help you differentiate between other people with the last name until our duplicates are eliminated.
4. Click the **Save** and then **Close** buttons.
5. Click **Contacts**, search for the departing member and click to open his/her record.
6. Click **Tools** and choose **Split Household** tool.
7. Select the departing member from the **Departing Member** drop down.
8. Type the last name of the receiving household in the **Other Household** search box.
9. Select the address that contains the *****
10. Select a **Departure Reason** from the drop-down menu.
11. **Important note for Marriage, Separation and Divorce:**
 - a. Click in the **Spouse** drop down menu and select the Spouse. This will **create or update** the "Relationship" tab in the Contact record for both the departing member and the spouse.
 - b. If children are **NOT** departing, uncheck the **Create Records for Children** box.
 - c. If children **ARE** departing, keep the **Create Records for Children** box checked to create a "non-custodial" Other Household record for each child.
12. **If other household members are moving too, double click on his/her name under the Household Members heading to move them under the Departing Members heading.**
13. Make changes in the **Departing Members** list if necessary:
 - **Last Name:** Click on the last name and edit it as needed.
 - **Household Position:** Click the current household position and choose from the menu.
14. Click the **Split Household** button and then **Close**.
15. Click the **Edit Record** button and edit the **Legacy Salutation** field if necessary.
16. Click **Actions** and choose **Add/Edit Family** tool.
 - a. Remove the ***** at the beginning of the address and click Save.
 - b. If a donor record is needed: click the **More** button and check the **Donor Record** button.
 - c. Click the **Save** and then **Close** buttons.
17. Enter an envelope number if desired.
 - a. Scroll down until you see the **Donor** field and click the **blue chain link**.
 - b. Click **Edit Record** and add an envelope number and click **Save**.