



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 record in a different parish. See Page 4 for instructions for moving a parishioner from another parish to yours.

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 (Usually set on the husband or a single person):
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. Check to make sure the **Participant type** is set to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Enter and envelope number.
 - e. Click the **Save** and then **Close** buttons.



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 record in a different parish. See Page 4 for instructions for moving a parishioner from another parish to yours.

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 (Usually set on the husband or a single person):
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. Check to make sure the **Participant type** is set to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Enter and envelope number.
 - e. Click the **Save** and then **Close** buttons.



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 instruction 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. See Page 4 for instructions for moving a parishioner from another parish to yours.

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. Set up a **Donor Record** if one doesn't already exist (Usually set on the husband or a single person):
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. Check to make sure the **Participant type** is set to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Enter and envelope number.
 - e. Click the **Save** and then **Close** buttons.



Using Split Household Tool to Move a Contact Between Parishes.



These instructions are commonly used when an adult child is moving out of their household to another parish.

1. Contact the parish that currently houses the contact record you are attempting to move.
2. Ask them follow the instructions for splitting the person to their own household found on page 1 of this packet with these distinctions:
 - a. Give them the individual's **name** AND **current address**.
 - b. They should set the **Parish** field to yours.
 - c. They should set the **Household Position** to **Head of Household**.
3. If they should be added to an existing household in your parish, use the Combine Household Tool to merge the new household into your existing household. Instructions found at the top of this page: <https://www.eriecd.org/mpt2.html#CombineHouse>
4. Set up a **Donor Record** if one doesn't already exist (Usually set on the husband or a single person):
 - a. Click the **Tools** button and choose **Add/Edit Family**.
 - b. Check to make sure the **Participant type** is set to **Registered Member**.
 - c. Click the **More** button and check the **Donor Record** box.
 - d. Enter and envelope number.
 - e. Click the **Save** and then **Close** buttons.