

Marking individuals as deceased in Ministry Platform

The Deceased Person Tool or DPT does the following in one efficient swoop.

- Changes AND contact status to Deceased
- Removes them from groups and events
- Unsubscribes publications like Faith
- Transfers donations/pledges to living spouse
- Moves them into a separate household to eliminate them from letters, labels, or merges

Quick Steps:

- 1. Click **Contacts** and search for the deceased person and click to open his/her record.
- 2. Click **Primary Family** to note if this person is married or the last surviving member of the family.
- If not married, proceed to step 5.
 If married, use Add/Edit family tool to set husband & wife to Active, Married and Head of Household.
- 4. Click the **General** tab.
- 5. Click the **Tools** button in the upper right corner and choose **Deceased Person**.
- 6. Check every box shown below in yellow. If it is grayed out, it does not apply.

To not check **Move to Separate Household** if he or she is the last surviving member of the family.

To NOT check Cancel Envelope Number, if you want to Transfer Envelope to spouse.

Transfer Donor Accounts or **Transfer Donations** when spouse is **Alive, Active and Catholic**

 Do NOT check Discontinue pledges if you want to Transfer Pledges to spouse.
 DO Discontinue pledges if he or she is last surviving member of the family or if remaining HOH wants to discontinue the pledge.

7. Click the **Save** <u>twice</u> and close the tool. The deceased person will seem to disappear from your congregation but he or she will appear in their own family record tomorrow.

- Remove Personal Data	– Update Family Data ——————————————————————————————————
Email	Change Spouse Status to Widowed
Cell Phone	Add Missing Child Relationships
Remove From Household	– Donation Data –
Move to Separate Household	Transfer Donation Data to Spouse - Hoover, Eileen Donations - 850
Change Status to Deceased	Transfer Donations
Discontinue Journey	Transfer Donor Accounts
End Date Participant Record	Transfer Envelope
End Date Groups (0)	Cancel Envelope Number
End Date Care Cases (0)	Transfer Pledges (5)
Future Events (0)	Discontinue Pledges (2)
Close Open Responses (0)	Date Of Death MM/DD/YYYY
Unsubscribe Publications (0)	Participant Type
Opt Out All Communications	Deceased