




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.
3. Check both spouses **Marital Status** field. **They both must show as married.**
4. Click the **Relationship** tab for one of the spouses. There **must** be a "Married to" record on the Relationship tab showing they are married to one another. If there isn't a relationship, you must create one.
5. Switch to the Deceased person's contact record.
6. Click the **Tools** button in the upper right corner and choose **Deceased Person**.
7. Check every box shown below in yellow. If it is grayed out, it does not apply.
 - ★ **You MUST Move to Separate Household** unless he or she is the last surviving member of the family.
 - ★ When spouse is **Alive, Active and Catholic**, choose BOTH **Transfer Donor Accounts** and **Transfer Donations**. (If one of them is gray, that means there is nothing to transfer.)
 - ★ Click **Transfer Envelope** if the spouse is **Alive, Active and Catholic**
Click **Cancel Envelope Number** if you do not want to transfer it to the spouse.
 - ★ Choose **Transfer Pledges** if the spouse is interested in continuing the pledge
Check **Discontinue pledges** if there is no spouse or no interest in continuing the pledge.
DO Discontinue pledges if he or she is last surviving member of the family.
8. Click the **Save** button twice 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
<input type="checkbox"/> Email	<input type="checkbox"/> Change Spouse Status to Widowed
<input type="checkbox"/> Cell Phone	<input type="checkbox"/> Add Missing Child Relationships
<input type="checkbox"/> Remove From Household	
<input type="checkbox"/> Move to Separate Household 	
<input type="checkbox"/> Change Status to Deceased	
<input type="checkbox"/> Discontinue Journey	
<input type="checkbox"/> End Date Participant Record	
<input type="checkbox"/> End Date Groups (0)	
<input type="checkbox"/> End Date Care Cases (0)	
<input type="checkbox"/> Future Events (0)	
<input type="checkbox"/> Close Open Responses (0)	
<input type="checkbox"/> Unsubscribe Publications (0)	
<input type="checkbox"/> Opt Out All Communications	
	Donation Data
	Transfer Donation Data to Spouse - Hoover, Eileen
	Donations - 850
	<input type="checkbox"/> Transfer Donations
	<input type="checkbox"/> Transfer Donor Accounts
	<input type="checkbox"/> Transfer Envelope
	<input type="checkbox"/> Cancel Envelope Number
	<input type="checkbox"/> Transfer Pledges (5)
	<input type="checkbox"/> Discontinue Pledges (2)
	Date Of Death <input type="text" value="MM/DD/YYYY"/>
	Participant Type
	Deceased