Marking individuals as deceased in Ministry Platform

NOTE: The deceased person will seem to disappear from your congregation.
Do not panic. He or she will appear in their own family tomorrow.

Quick Steps:

1. Click **Contacts** and search for the deceased person.
2. Click to open his/her record.
3. Click **Primary Family** to note if this person is married or the last surviving member of the family.
4. **If not married,** proceed to step 5.

   If married, the following must be true for **BOTH** spouses for the Deceased Person Tool to move donations from the deceased individual to the surviving spouse.

   You can use the **Add/Edit Family** tool from the General tab to check the "Heads are Married" box.

Contact Status	=	Active
Contact Marital Status	=	Married
Family Position	=	Head of Household

5. Click the **General** tab.
6. Click the **Tools** button in the upper right corner and choose **Deceased Person.**
7. Check **MOST EVERY** box on the Deceased Person screen that is not grayed out.
   (If an entry is grayed out, no data exists.)

   Exceptions:

   a. Do not check **Remove from household.** Instead check **Move to Separate Household.**
   b. Do not check **Cancel Envelope Number**, if you want to **Transfer Envelope** (to spouse).
   c. Do not check **Discontinue pledges** if you want to **Transfer Pledges** (to spouse). Choose **Discontinue pledges** if he or she is the last surviving member of the family or if the remaining HOH is not Catholic and/or not interested in continuing the pledge.
   d. Do not check **Remove from household** if he or she is the last surviving member of the family.
8. Set the **Participant Type** to **Deceased**.
9. Enter a **Date of Death.**
10. Click the **Save** button and then click **Save** again on the confirmation page.
11. Close the tool when you receive confirmation that the tool ran successfully.