# CT 2.0: Intro

## Clerk Tutorial 2: Transfers

**Start here**: Intro

### What you need

**Practice partner -**
Working in a class? Pair off with another class member. Working alone? Ask another church clerk or your conference clerk.

**Member to transfer -**
This needs to be a baptized member, use your own member record or "Harold" who you added in **Exercise Set 1**. If you haven't already added "Harold", you'll want to revisit **Exercise Set 1** and see what you missed.

## The Transfer Process - from A to Z

1. **Request** - Z asks, "A, will you transfer _____ to us?"

2. **Grant** - A replies, "Yes, we will"

3. **Accept** - Z replies, "Great, thank you"

## Ok, let's try it...

Working with a partner? Decide whether you will be A or Z. If you're Z, start with "Transferring In" and, if you're A, start with "Transferring Out". After you complete the first transfer, switch roles and transfer the member back.

No partner? Ask your conference clerk to help.

Continue to   Exercise 1: Online Transfers (http://eadventist.helpscoutdocs.com/article/116-clerk-
tutorial-2-online-transfers)

# CT 2.1: Online Transfers

## Clerk Tutorial 2: Transfers

## Exercise 1: Online Transfers

Working with a partner? Decide whether you will be A or Z. If you're Z, start with "Transferring In" and, if you're A, start with "Transferring Out". After you complete the first transfer, switch roles and transfer the member back.

No partner? Ask your conference clerk to help

### Transfer In

If you're "Z", start here then switch to  Transfer Out (#transfer_out).

Ask your practice partner (or conference clerk) for the name of their **church** and the **full name** of the member that you can transfer for this exercise ("Harold" or another member). Record the information below. In a real transfer, the new member will contact you and provide their name and the church that holds their membership:

*Full name of member* _____

*Practice partner's church* _____

**Step 1 – Request**

1. Choose the purple **People** menu section on the left, then choose **transfers**.

2. On the **Transfers** screen, click the "Request Transfer" button.

3. On the **Request Transfer** screen, leave "Transfer member" set to "to my church". Click the "Select" link to choose the member's current church (the granting church). This will open the **Select Church** pop-up.

4. In the"Search for" field, enter part of the member's current church name (the one you wrote down above), then click the "Search" button to display a list of all churches whose names match your criteria.

5. Find the church in the search results. Select it by clicking the circle beside it, then click the "Ok" button.

6. The **To clerk of** field should show the church you selected.  Select **your** church in the **To join** field and enter the member's name in the **Last name** and **First name** fields. The **Middle name**, **Suffix** and **Birth date** fields are optional.

7. Click the "Save" button to create the transfer request. eAdventist will notify the other clerk that you have created this new request.

8. Notice that this transfer request is listed on the **To grant** tab, and has a **yellow** light beside it.  Yellow means **wait** while the other clerk grants the request.

**Step 2 – Grant (your partner's turn)**

> TIP: For practice transfers, your partner will let you know when they have granted the request. eAdventist will automatically notify you of your partner's changes by email. You can also check the "Transfer Reminders" section of the **Home** screen at any time to see how many transfers are waiting for your attention.

**Step 3 - Accept**

9. Reload the **Transfers** screen and verify that the request is no longer included on the **To grant** tab. Now click the **To accept** tab.

10. Notice that the request has moved to the **To accept** tab and has a **green** light again. Your request has been granted. For real transfers, you will take the member's name to your church board or pastor for voting by the church board and congregation. For this practice transfer, you are the board and congregation and you just voted to approve the transfer. Click the **View** link to enter your vote.

11. On the **Transfer** screen, you can see that the other clerk has granted the request. Click the "Accept/Decline" button to enter your final vote.

12. Choose "Accepted" and enter the date of the vote, (e.g. September 3, 2013 in mm/dd/yyyy format) and click the "Save" button.

13. This will take you back to the **Transfer** screen and shows that the member now belongs to your church.

14. The member's name should be a link. This indicates that the member belongs to your church and you can access his/her record. Click on the link to confirm this.

15. The **Person** screen displays the member's information. The lower part of the page shows all family members and which church they belong to.  If a family member belongs to a different church, you will see their name but it will not be a link since you do not have access to their record.

16. Done! Switch roles and transfer the member back.

## Transfer Out

If you're "A", start here, then switch to Transfer In (#transfer_in).

1. Choose the purple **People** menu section on the left, then choose **transfers**.

2. On the **Transfers** screen, click the **To grant** tab and find the request that your partner just created.

**Request (your partner's turn)**

> TIP: eAdventist will automatically notify you of your partner's entries by email. You can also check the "Transfer Reminders" section of the **Home** screen at any time to see how many transfers are waiting for your attention.

**Grant**

3. Reload the **Transfers** screen and find the new request that your partner created. It will have a **green** light ("go"), indicating that it's your church's turn to vote on it. For a real transfer, you would take the member's name to your church board or pastor for voting by the church board and congregation. For this practice transfer, you are the board and congregation and you just voted to grant the transfer.

4. Click the **View** link to see the transfer. On the **Transfer** screen, notice that the transfer has been requested but not granted. Click the "Grant/Deny" button to enter your vote.

5. On the **Process Transfer Request** screen, eAdventist will automatically attempt to find requested name in your member records. If you don't see the member in the search results, you can adjust "Search last name" and "Search first name", and click the "Search" button. When the search returns the member, select him/her from the results list.

6. Set the "Action" to "Granted", enter the **Voted** date (e.g. July 9, 2013 in m/d/yyyy format), and click the "Save" button.

7.  eAdventist will notify the other clerk that your church has granted the transfer.  Notice that the **Transfer** screen shows your "Grant" vote. Click the **Back to transfers** link to return to the **Transfers** screen.

8.  Click on the **To accept** tab and find the transfer that you granted. It now has a **yellow** light, indicating that you are **waiting** for the other clerk to accept the transfer.

**Accept (your partner's turn)**

> TIP: eAdventist will automatically notify you of your partner's entries by email. You can also check the "Transfer Reminders" section of the **Home** screen at any time to see how many transfers are waiting for your attention.

**Check the results**

9.  Reload the **Transfers** screen and verify that the request is no longer included on the **To accept** tab. Now click the **Completed** tab

10. Notice that the request has moved to the **To accept** tab and has a **green** light again. Your request has been granted. If you don't see the completed transfer, try increasing the value in **Days to show** and click "Save setting".

11. Let's check if you can still access the member's record. Click on **search** (under the **People** menu section).

12. Enter the last name in the **Last name** field and click the "Search" button.

13. You should see any other of member's family listed in the search results, but not the outgoing member.

14. If the member you transferred out has other family members remaining in your church, click to select one of them.  Notice that the outgoing member is now a member in your practice partner's church.

15. Done! Switch roles and transfer the same member back.

> Continue to   Exercise 2: Transfer Comments (//help.eadventist.net/article/142-transfer-comments)

# CT 2.2: Transfer Comments

## Clerk Tutorial 2: Transfers

**Start here**: Intro

Exercise 1: Online Transfers (http://eadventist.helpscoutdocs.com/article/116-clerk-tutorial-2-online-transfers)

  - Transfer In
  - Transfer Out

Exercise 2:  Transfer Comments

Exercise 3:  Transfer TO an International Church (//help.eadventist.net/article/115-clerk-tutorial-2-transfer-to-an-international-church)

Exercise 4:  Transfer FROM and International Church (//help.eadventist.net/article/113-clerk-tutorial-2-transfer-from-an-international-church)

## Exercise 2: Transfer Comments

Work with the same partner as in Exercise 1 - another church clerk or your conference clerk.

 If you're Z, start with "Requesting a Transfer" and, if you're A, start with "Replying with a Comment".

### Requesting a Transfer

If you're A, go to "Replying with a Comment" instead.

**Step 1 - Create a Request**

Use the same steps as in Exercise 1, to request the transfer of Jenny Anderson from your partner's church to yours. The request should show on the "To grant" tab of the **Transfers** page. It should have a yellow "light" in the first column - indicating that you are waiting for the other clerk to grant the request.

**Step 2 - Add a Comment (your partner's turn)**

Unfortunately, Jenny had previously transferred out of your partner's church and is no longer a member there. Your partner will let you know this by adding a "Comment". eAdventist notifies you of the Comment by displaying a "balloon" in the second column and sending you an email.

**NOTE:** To preserve member privacy, eAdventist does not provide any verification that the person you

> requested **is a member** or **belong s to the church** that you selected. It simply forwards the request to the other church clerk - who will verify it for you and either Grant the request or reply with a Comment.

### Step 3 - Reply with a Comment

Click on the "View" link next to Jenny's name on the "To grant" tab. Click on the "Add a comment" link in the "Comments" box and write a brief thank you. Click "Save" when you are finished. eAdventist will send a notification email to your partner.

### Step 4 - Withdraw the Request

Finally, click the "withdraw" link on the "Actions & Comments" tab. When you click the "Back to transfers" link, the transfer should show on the "Withdrawn" tab. eAdventist will send another email notification to your partner. You're done!

## Replying with a Comment

If you're Z, go to "Requesting a Transfer" instead.

### Step 1 - Create a Request (your partner's turn)

Your partner will request the transfer of Jenny Anderson from your church to his/hers. The request should show on the "To grant" tab of the **Transfers** page. It should have a green "light" in the first column - indicating that you will need to grant the request.

### Step 2 - Add a Comment

Click on the "View" link next to Jenny's name on the "To grant" tab. Jenny is not a member of your church, so you won't be able to grant the request. To let the other church clerk know this, click on the "Add a comment" link in the "Comments" box and write a brief explanation. Click "Save" when you are finished.

### Step 3 - Reply with a Comment (your partner's turn)

Your partner will add a Comment thanking you for the information. eAdventist will send you an email notification.

### Step 4 - Withdraw the Request (your partner's turn)

Your partner will Withdraw the request. eAdventist will send you an email notification of the Withdrawl. You're done!

> **NOTE:** eAdventist will automatically send an email notification of each Comment to all church clerks and conference clerks that are involved in the transfer - except for international clerks.

Continue to   Exercise 3: Transfer TO an International Church (//help.eadventist.net/article/115-clerk-tutorial-2-transfer-to-an-international-church)

*Last updated on March 2, 2022*

# CT 2.3: Transfer TO an International Church

## Clerk Tutorial 2: Transfers

Start here **:** Intro (http://eadventist.helpscoutdocs.com/article/112-clerk-tutorial-2-intro)
Exercise 1: Online Transfers (http://eadventist.helpscoutdocs.com/article/116-clerk-tutorial-2-online-transfers)
- Transfer In
- Transfer Out
Exercise 2: Transfer Comments (//help.eadventist.net/article/142-transfer-comments)
**Exercise 3**: Transfer TO an International Church
Exercise 4: Transfer FROM an International Church (//help.eadventist.net/article/113-clerk-tutorial-2-transfer-from-an-international-church)

## Exercise 3: Transfer TO an International Church

For this exercise, your conference clerk will be your practice partner since he/she will enter the international church's vote.

> **TIP**: If you receive a "Request for Transfer of Church Membership" by postal mail or email, the church is **international** or "offsystem" (i.e. outside of North America and Guam/Micronesia), otherwise the request would have come via eAdventist.

For our example, we are going to assume that the international ("offsystem") church is requesting Allen [*yourLastName*], a member added in Clerk Tutorial 1. If you haven't added Allen, you can also choose a real member of your church for this exercise.

*Full name of member* _____

1. It's always a good idea to use **Person Search** to verify that the individual is in your membership records before starting on the transfer. Click on the **People** menu section, then click "search".

2. On the **Person Search** screen, type in the first few letters of the last name of the member and click the "Search" button.

3. If you find the member's name in your search results and see "Member" in the "Status" column, then you're ready to start on the transfer. Click the transfers menu item to go to the **Transfers** screen.

4. International churches do not have access to eAdventist, so international requests will come by postal mail or email. You will need to enter the request in eAdventist on their behalf. To do this, click the "Request Transfer" button.

5. On the **Request Transfer** screen, change the "Transfer member" setting to "to an Offsystem church (from my church)".

6. Select your church in the "To clerk of" drop-down list (remember, you are entering request that you received). Then click the "Select" link next to "To join" and find the church that requested the transfer.

7. For this exercise, you can choose any international church. For example, enter "first" in the "Church name" field and click the "Search" button.

8. From the churches in the search results, select one (indicated by a "globe" icon next to the name), then clicking on the "Ok" button. (NOTE: If you cannot find the church you are searching for, try variations of the name, city or country. If you are still unable find it, use "request new" in the "Organization" menu section to have it added).

9. The church you selected should be displayed in the "To join" field.  Enter the last name and first name of the member and click the "Save" button.

10. The transfer is now ready to be voted by your church indicated by the green "light". For a real transfer, take the member's name to your church board or pastor for voting by the church board and congregation. For this exercise, consider it voted and click the View link for the request.

11. On the **Transfer** screen, click the "Grant/Deny" button to enter your vote.

12. On the **Process Transfer Request** screen, eAdventist will automatically attempt to find requested name in your member records. If you don't see the member in the search results, you can adjust "Search last name" and "Search first name", and click the "Search" button. When the search returns the member, select him/her from the results list.

13. Set the "Action" to "Granted", enter the "Voted date" (e.g. July 9, 2013 in m/d/yyyy format), and click the "Save" button.

14. eAdventist will return to the **Transfer** screen where you will see your vote. Click the "Back to transfers" link to return to the main **Transfers** screen.

15. Click on the **To accept** tab and find the transfer which now has a yellow "light" indicating to wait for the other church. The transfer will display on the **Completed** tab once this final vote has been entered.

16. The international church doesn't use eAdventist, so how will they find out that your church has granted the request? Your conference membership clerk takes care of this for you. Notice that the "Printed" column says "Pending".

17. Your conference membership clerk mails prints these transfers on a regular basis. The next mailing will create a notification that your conference clerk will send to the international church. For real transfers on the "live" site, you will see the print date.

18. After a few weeks, the other church will vote the individual into membership and return the form to your conference membership clerk. Your membership clerk will enter the acceptance date on behalf of the international ("offsystem") church and the next time you log in, this transfer will display on your **Completed** tab. Also, the member will no longer be in your membership list.

19. Ask your conference membership clerk to accept the transfer on the **Demo** site. Once the transfer has been accepted, you can double-check that the individual is no longer a member in your church by clicking the search menu item under the **People** menu section.

20. Enter a portion of the member's last name and click the "Search" button.

21. The individual should not be included in the search results if the transfer has been completed.

22. You have successfully completed a transfer to an international ("offsystem") church.

Continue to   Exercise 4: Transfer FROM an International Church (//help.eadventist.net/article/113-clerk-tutorial-2-transfer-from-an-international-church)

# CT 2.4: Transfer FROM an International Church

## Clerk Tutorial 2: Transfers

Start here **:** Intro (http://eadventist.helpscoutdocs.com/article/112-clerk-tutorial-2-intro)

Exercise 1:  Online Transfers (http://eadventist.helpscoutdocs.com/article/116-clerk-tutorial-2-online-transfers)

  -  Transfer In
  -  Transfer Out

Exercise 2: Transfer Comments (//help.eadventist.net/article/142-transfer-comments)

Exercise 3:   Transfer TO an International Church (//help.eadventist.net/article/115-clerk-tutorial-2-transfer-to-an-international-church)

**Exercise 4**:  Transfer FROM and International Church

## Exercise 4: Transfer FROM an International Church

For this exercise, your conference clerk will be your practice partner since he/she will enter the other church's vote.

**TIP**: Whenever someone is transferring to your church, whether they are coming from another eAdventist church or an **international** (or  *offsystem*) church, you always start the same way – by requesting the transfer to your church.

1.  Click the **People** menu item, then click transfers.

2.  Click the "Request transfer" button.

3.  To indicate which church the person is transferring from, click the "Select" link.

4.  In the **Select Church** pop-up, enter a portion of the church name in the "Name containing" field and click the "Search" button.

5.  For this example, find and select an international (*offsystem*) church (indicated by the "globe" icon), then click the "Ok" button. The church name will automatically be displayed in the "To clerk of" field.

6.  Select your church in the "To join" field, enter the name of the person transferring to your church (just make one up for this exercise), and click the "Save" button.

7.  The transfer will be displayed on the **To grant** tab with a yellow light indicating that you are waiting for the international church to grant the request. At this point, the "Printed" column indicates that this transfer is

"Pending" – your conference clerk has not yet printed and mailed this transfer request to the international church.

8. For real transfers on the "Live" site, your conference membership clerk will print and mail the request. After that happens, the Printed date will be filled in.

9. It can often take several weeks or more to receive the international church's grant vote due to postal and language challenges. When it arrives, your conference clerk enter it in eAdventist and eAdventist send you an email notification. If the international church inadvertently returns their grant vote to you, forward it to your conference. For this exercise, ask your conference to enter a grant so that you continue.

10. Once the grant vote has been entered, there is an important difference from normal transfers. The international church is not using eAdventist, and has no existing member record to transfer. How do we get around this problem? Add the person to your church as a nonmember.

11. To add a nonmember for this exercise, click "new family" under the **People** menu section (you can also add a person to an existing family). On the blank **Person** screen, enter the transferring person's name, and any other information you have, being sure to select your church in the "Church" field, check the "Union paper" and "Adventist Review" boxes, and click the "Save" button.

12. This individual now a nonmember in your church's eAdventist records. NOTE: this is the only situation in which a nonmember record can be transferred.

13. If your conference clerk has entered the international church's grant vote, click transfers under the **People** menu section.

14. Find the transfer request on the **To accept** tab. In reality, the dates requested, granted, and accepted will each be a few weeks apart, but for practice purposes, we are just entering made-up dates. Pretend your church has accepted this person into membership, and click the "View" link.

15. Enter the "Voted date" (e.g. July 15, 2013 in m/d/yyyy format). Notice that eAdventist provides an option to enter the member's original membership method and date (how they first became a Seventh-day Adventist) in the "Member by" and "Membership date" fields. If you do not have this information, it's optional. Click the "Save" button.

16. The **Transfer** screen will show you that the transfer is now completed.  Click on the new member's name to look at her membership record (any names that are not links have transferred out of your membership and are no longer available for you to see).

17. On the **Person** page, verify that the "Church" field shows the name of your church and that the "Status" is now "Member".

18. Click the **Membership** tab on the lower part of the screen.

19. The transfer history should be displayed at the bottom of the tab. If you don't have the member's original baptism date, you can enter it later on this tab in the "Membership date" field.

20. You have successfully transferred someone from an international (*offsystem*) church. Note that your

conference clerk needs to help on Step 9. For real transfers, it is best to enter the nonmember record (Step 11) BEFORE entering the transfer request so that it ready when your conference clerk receives and enters the international church's grant vote.