

## Transfer a person to Another Organization

1. You can transfer a person between any two organizations to which you have edit permissions. For example if a person is transferring between two Fraternities within a Region a Regional Admin can perform the task. However, before making any transfer, make sure that all necessary paperwork is completed. The request should normally come from the minister of the gaining organization.
2. Click on **Transfer Person to Another Organization** link on the left side of any Organization Summary Page. This will open a Search Form. You can enter one or more of the fields.

**Search for Person to Transfer**

[RETURN TO ORG SUMMARY](#)

Last Name ?

First Name ?

Suffix

Membership Status

Profession Status

Active ☒ Yes ☐ No ☐ Any

Primary Membership Organization ?

Parent Organization ?

[SEARCH](#)

**general functions**

[Select a Different Organization](#)

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- a. Enter **Last Name** and **First Name**. You can use a partial entry with '%'. In the example 'Mus%'.
- b. **Suffix** can be one of the common orders (e.g., **OFS**, **OFM**, **OFM Cap**).
- c. **Membership Status** can refine the search the form is # -Status (e.g, 01-Active, 02-Lapsed).
- d. **Active** is set to Yes, No or Any (default which mean if will select both Active and Inactive Persons).
- e. **Primary Membership Organization** Select a Fraternity or Province or leave it blank for all.
- f. **Parent Organization** Select a Region or Religious Order to limit the search or leave it blank for all.
- g. Click on [SEARCH](#) to generate a list of possible persons.

45390	Mussatto	William	OFS	Mussatto, William Roland	Professed	Yes	01-Active	Holy Spirit-Claremont-CA	Saint Francis-unknown-CA	Transfer
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- h. When you find the person click on the [Transfer](#) link to select the person.

*Select the organization you want to transfer to:*

National Organization:

Active Only: ☒

National	Region	org_unit_id	New Fraternity	active	Read Priv	Edit Priv
<input checked="" type="checkbox"/> OFS-USA						
<input checked="" type="checkbox"/> Saint Francis-unknown-CA						
		20052	Saint Francis-unknown-CA	Yes	No	Yes
		11351	Blessed Luchsius & Bounadonna /K/-Los Angeles-CA	Yes	No	Yes

- i. Then the [Select the organization you want to transfer to](#) page will appear. Select the National Organization (if its not the default OFS-USA) and leave the **Active Only** check box is checked unless you are transferring a person to an inactive organization. Click on the '+' to expand the list. Find the correct organization and click on the [Transfer to here](#) link. This will open the confirmation screen.
3. On the Confirmation Screen confirm the **From Here** and **To Here** are correct. Then enter the Transfer Date. Finally click on  to activate the Transfer.
4. If something is incorrect click on  to restart the process with the correct information.

*Make the transfer here:*

Person ID: 45390

You are Transferring: Mussatto, William Roland

Transfer from Parent Organization: Saint Francis-unknown-CA

Transfer from primary organization: 10149

From Here:

New parent organization: Saint Francis-unknown-CA

New Primary Organization: 10160

To Here:

Transfer Date \*: