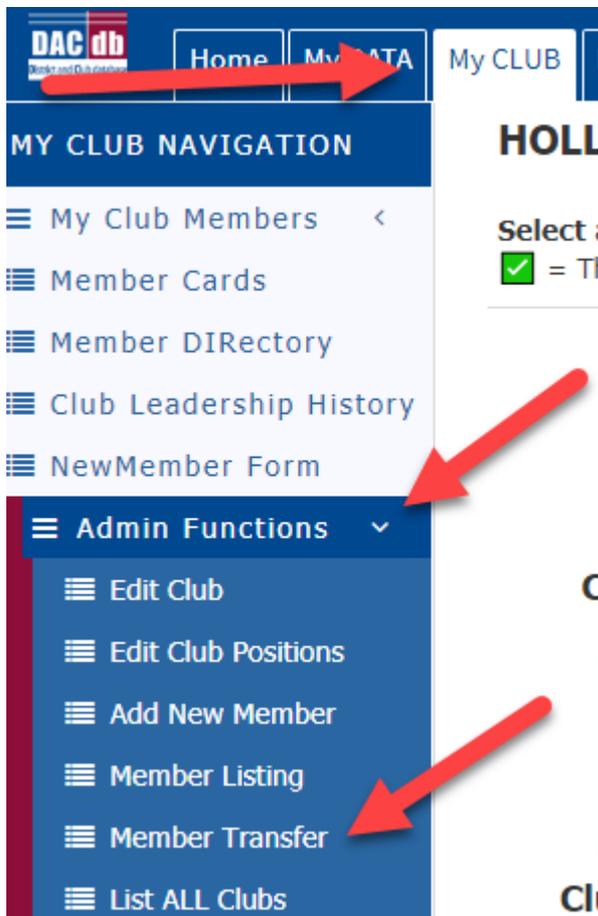


## Transferring a Member

Lin Kelly - 2025-03-25 - Club Members

**Transferring a Member** (this only works for members who are in the DACdb system and have been **TERMINATED** in their previous club).

1. Click the **My Club** tab; expand "Admin Functions" on the left hand side; and then click the "Member Transfer" option.



2. **Member Transfer Page**--Type in partial or complete Last name in Search Parameters and click Search.

## Member Transfer - into Hollywood (5551212)

### Add Member

Cancel

User this function when a Member was previously terminated from another club and in joining club (**Hollywood**).

This function will allow you to search for the terminated member in the DACdb system, and ADD them into this club -- copying over the existing terminated member information. The selected member here will be added to this club (**Hollywood**) leaving the member terminated in the club where they were terminated and creating a new record with the same MemberID and member information in this club (**Hollywood**).

#### Search Parameters

Enter partial Member name:

Search

#### Notes:

- Enter a partial last name and (if necessary), the comma and partial first name, to find the terminated member in DACdb, you are looking to find.
- THERE IS NO SUCH THING AS A TRANSFER WITHIN RI. It is a **TERM** in one Club and an **ADD** in another Club.
- The MemberID of the terminated member selected will be used. This parallels what RI will attempt to do - find the Member's ID and reuse it.
- Please verify the member information. Most likely the member address or phone information has changed.
- Please correct the start date. By default -- today's date will be used as the start date in your club.
- RI ADD will be sent immediately following the member selection and ADD.
- Honorary MemberTypes from another club can be added as Active Member in another club.

3. **Find the correct member--** A list will display of records that match the search filter you entered. Floating your cursor over **View** in the Action column allows you to see a few details about the person to be able to verify the individual is the right one.

4. When you find the right person, click the **Add** link next to their name. They will be entered into your club roster. Because their RI number stays with them, their addition to your club will be sent immediately to RI if you have RI Integration enabled.

5. After the member is added via the transfer process, you can edit their member profile to make additions or corrections to their contact information.

6. Check the Login tab to be sure the Username field is not blank. If so, insert their email in the Username field. Otherwise, they will be unable to log in to DACdb.

**Note:** When a member transfers into another club, their Start Date is when they are *entered into the club they are transferring into*. You and the member have the ability to enter the years in the previous club on the Club tab of the member's profile. That will keep track of the total Years in Rotary for the member.

Tags

Transfer member