How to Initiate a Transfer Request

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As chapter leader, you can initiate the transfer of an active or expired membership from your chapter to chapter you do not have authority over, within your state or in a different state.

GETTING STARTED

Where to begin:

Icons you will use:

Things to understand:

WHEN CAN A TRANSFER REQUEST BE INITIATED?

A transfer request can be initiated for an active and/or expired memberships when the following criteria is met:

- For **active** memberships:
  - His or her active membership has a **Local**, **State** or **Approved** submission level status
- For **expired** memberships:
  - He or she does not have an **active** membership in another chapter (e.g., membership has already been transferred to the inbound chapter and approved; **under the same account/FFA ID**, member self-registered for a membership in another chapter and was approved [i.e., member self-transferred])
  - **And**, you have authorization over the receiving chapter (e.g., you manage both the middle school and high school chapters)

If the membership is **expired** and you do not have authorization over the receiving chapter, the transfer can be initiated by:

- **State staff**, for in-state transfers – transfer is immediate
- **National staff**, for state-to-state transfers **when requested by state staff** – transfer is immediate
- **The member**, by self-registering for a membership in the inbound chapter (i.e., **member self-transfer**) – approval by inbound chapter leader is required
- **You**, by renewing the membership for the current year, for the purpose of creating a transfer request – approval by inbound chapter leader is required

WHEN WILL THE TRANSFER BE COMPLETED?

For the transfer to be completed, the inbound chapter leader must approve the transfer request in **Manage Membership Transfers**. The membership will continue to appear on the outbound roster until the request is approved.
DIFFERENCE BETWEEN OUTBOUND TRANSFERS AND INBOUND TRANSFERS
An outbound transfer is the transfer of a membership from your chapter (depart) to another chapter. An inbound transfer is the transfer of a membership to your chapter (receive) from another chapter.

TRANSFER ACTIVE MEMBERSHIP(S)
You can create a transfer request for an active membership with a Local, State or Approved submission level status.

Step One – Search:
Use Search and Advanced Search to locate the membership(s).
1. Select Student or Alumni – The default is Student unless you only have Alumni roles
2. Verify the current Membership Year is selected – The default is the current year
3. Verify your Chapter is selected – Your chapter should be the default unless you manage multiple chapters
4. In Advanced Search, narrow your search results by one or more of the following:
   a. Submission Level Status
   b. Grade
   c. FFA ID
   d. First Name and Last Name – Entered partially or completely
5. Click Search

Step Two – Create a Transfer Request:
With the membership(s) identified, you can now create a transfer request.
1. Select Membership(s) to be transferred by one of the following methods:
   a. Select checkboxes to transfer one or more memberships
   b. Click the top-left checkbox to transfer all memberships on the current page
2. In the Actions area, verify the correct State is showing – Your state should be the default
3. Click the  to open the Chapter drop-down menu
4. Select a Chapter
5. Click Transfer Membership(s)
6. Click OK to approve the action

Watch for a green success message at the top of the screen.

**Step Five – Monitor the Transfer Request:**
After creating a transfer request, you can monitor the status in Manage Membership Transfers.

1. Go to Manage Membership Transfers
2. Select Student or Alumni – The default is Student unless you only have Alumni roles
3. Verify the current Membership Year is selected – The default is the current Membership year
4. Verify your Chapter is selected – Your chapter should be the default unless you manage multiple chapters
5. Select Outbound Transfer Requests – The default is Inbound Transfer Approvals
6. View the Request Status column
TRANSFER EXPIRED MEMBERSHIP(S)

For expired memberships, you can create a transfer request *after* renewing the membership for the current membership year.

**Step One – Search:**

Use **Search** and **Advanced Search** to locate the membership(s) to be transferred.

1. **Select Student** or **Alumni** – The default is **Student** unless you only have Alumni roles
2. **Click the ** to clear the **Membership Year** field – The default is the current year

3. **Click the ** to open the **Membership Year** drop-down menu
4. **Select a past Membership Year**
5. **Verify your Chapter** is selected – Your chapter should be the default *unless* you manage multiple chapters

6. In **Advanced Search**, narrow your search results by *one or more* of the following:
   a. **Submission Level Status**
   b. **Grade**
   c. **FFA ID**
   d. **First Name** and **Last Name** – Entered partially or completely

7. **Click Search**
Step Two – Renew membership(s):
With the membership(s) identified, you can now renew the membership(s) for the current year.

1. Select Membership(s) to be renewed by one of the following methods:
   a. Select checkboxes to renew one or more memberships
   b. Click the top-left checkbox to renew all memberships on the current page
2. In the Actions area, verify the current Membership Year is selected – The default is the current year
3. Click the to open the Membership Type drop-down menu
4. Select a Membership Type
5. Click Renew Membership(s)
6. Click OK to approve the action

Watch for a green success message at the top of the screen.
**Step Three – Search for renewed membership(s):** Use Search and Advanced Search to locate the renewed membership(s).

1. Click the [ ] to clear the Membership Year field

2. Click the [ ] to open the Membership Year drop-down menu
3. Select the current Membership Year
4. In Advanced Search, leave your filters the same unless you previously searched by Submission Level Status or Grade
5. Click Search

**Step Four – Create a Transfer Request:**
With the renewed membership(s) identified, you can now create a transfer request.

1. Select Membership(s) to be transferred by one of the following methods:
   a. Select checkboxes to transfer one or more memberships
   b. Click the top-left checkbox to transfer all memberships on the current page
2. In the **Actions** area, click the [X] to clear the **State** field – Your state should be the default

3. Click the [ ] to open the **State** drop-down menu
4. Select a **State**
5. Click the [ ] to open the **Chapter** drop-down menu
6. Select a **Chapter**

7. Click **Transfer Membership(s)**
8. Click **OK** to approve the action

Watch for a green success message at the top of the screen.
**Step Five – Monitor the Transfer Request:**

After creating a transfer request, you can monitor the status in **Manage Membership Transfers**.

1. Go to **Manage Membership Transfers**
2. Select **Student** or **Alumni** – The default is **Student unless you only have Alumni roles**
3. Verify the current **Membership Year** is selected – The default is the current Membership year
4. Verify your **Chapter** is selected – Your chapter should be the default unless you manage multiple chapters
5. Select **Outbound Transfer Requests** – The default is **Inbound Transfer Approvals**
6. View the **Request Status** column

### Questions/Concerns

If you have any questions or concerns, please contact the National FFA Membership Team at membership@ffa.org or 888-332-2668, option 3.