Manage Club Members - Transfer A Member

This guide provides a step-by-step process for transferring a member from one club to another using the Lion Portal, ensuring a seamless transition while maintaining accurate membership records. It clarifies the responsibilities of the current and new club officers, helping users understand the necessary actions required from both parties. By following this guide, club administrators can efficiently manage membership changes, enhancing organizational effectiveness and member satisfaction.

1   Sign in to the Lion Portal. **lionportal.org**

## Drop - Transfer From Old Club

⚠️ **Alert**! To transfer a member into your Club the member needs to be dropped from their current club. The steps shown in this section are performed by the other club.
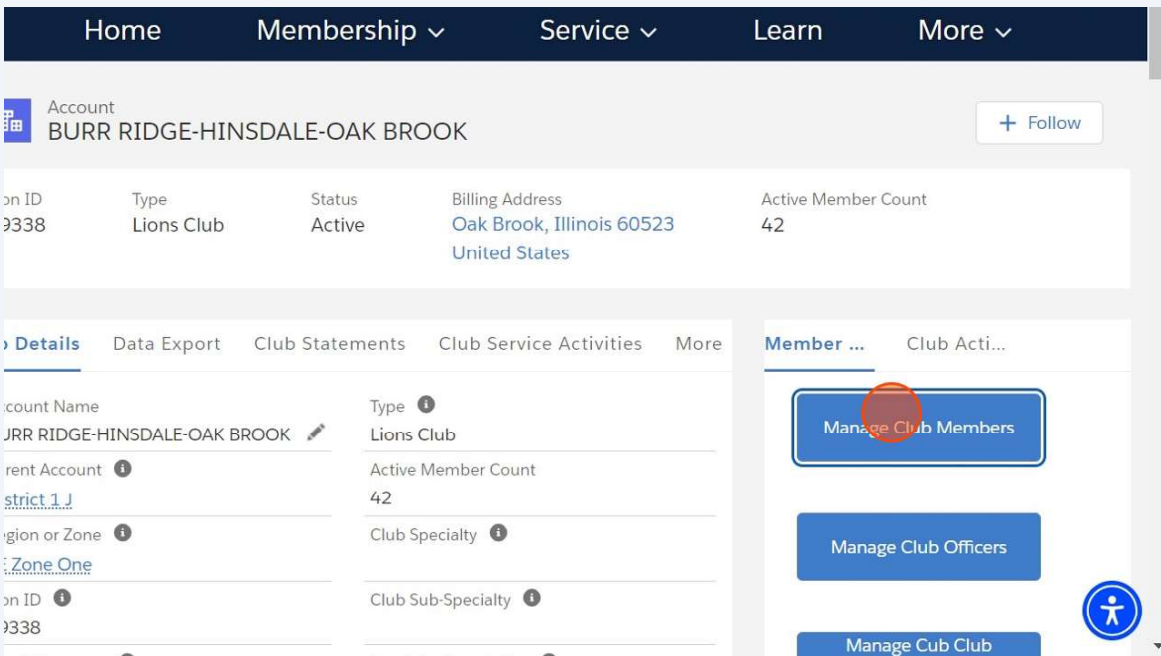
ⓘ This step is done by the Officer or Administrator of the **current** Club. Once the membership of the Member has been dropped the Officer or Administrator of the new club can transfer the member into the new club. This creates a new "Membership" record for the history of the member.
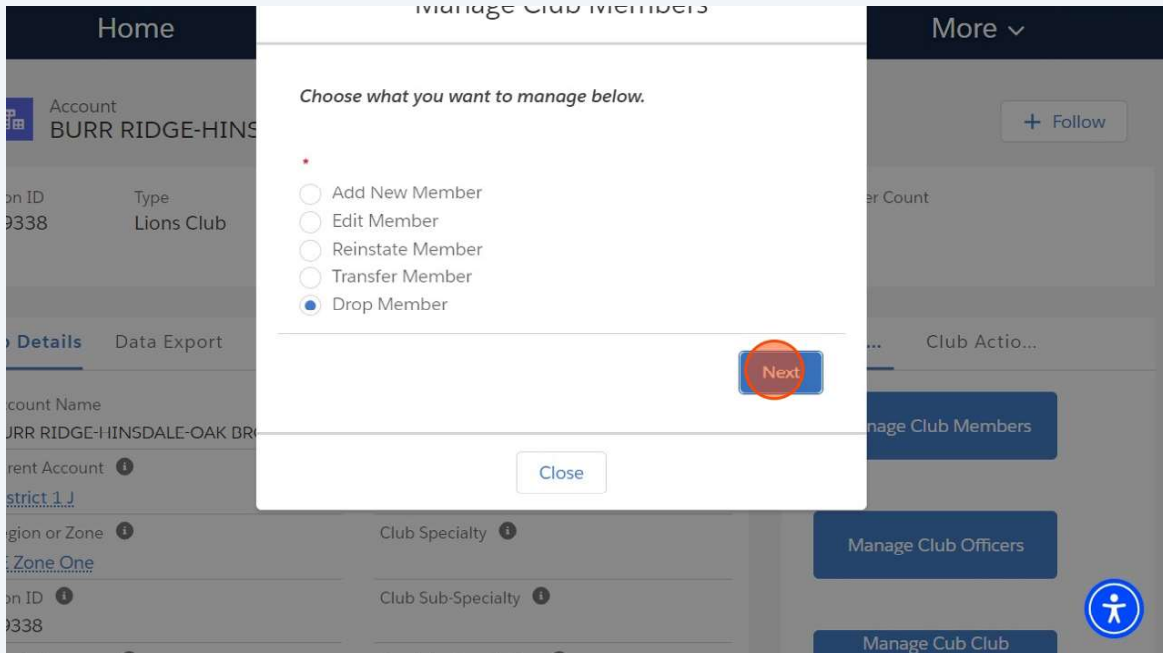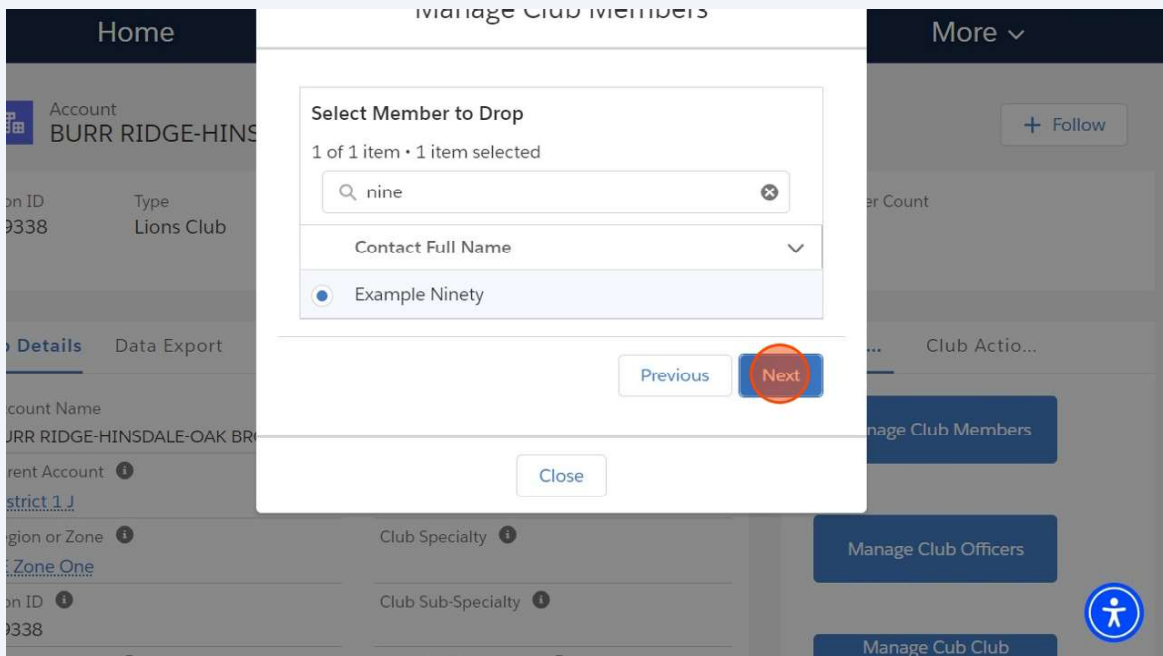
2 Click "MY CLUB"
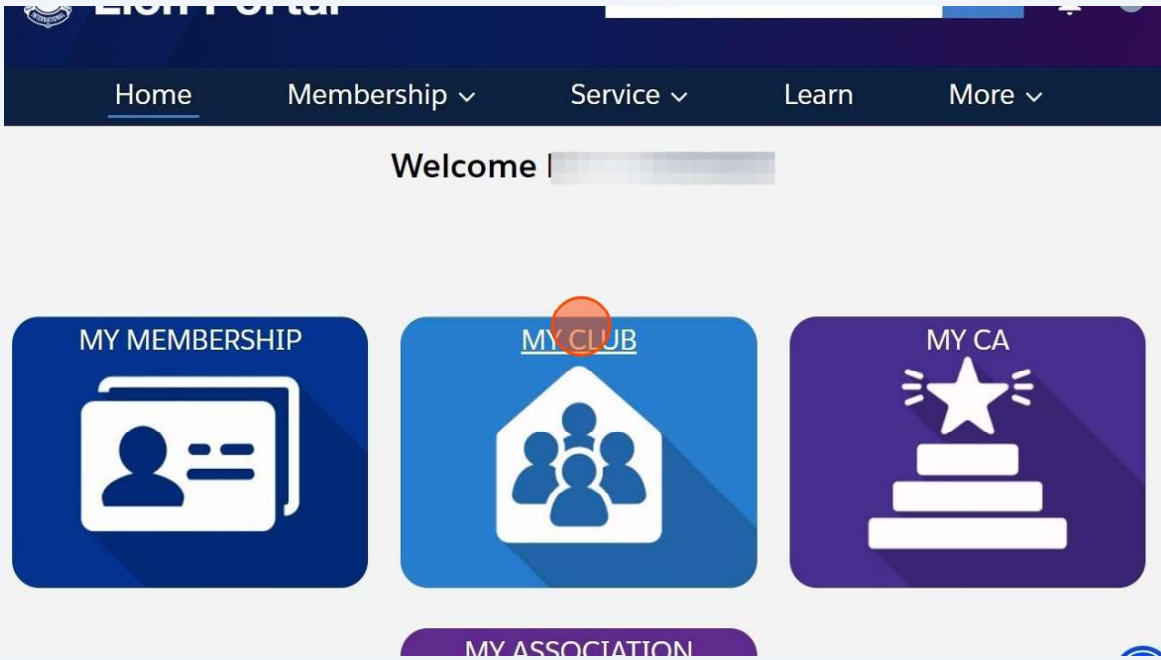
3 Click "Manage Club Members"

4 Select the "Drop Member" "Radio Button" and click "Next"

5 Select the member to drop by clicking the "Radio Button" next to the member name and click "Next"

6 Enter the "Membership End Date". Select the "Drop Reason" option "Transferred" option.

7 "Drop Reason Details" can be entered. Click "Save"

ⓘ   The member has been dropped from their current club.
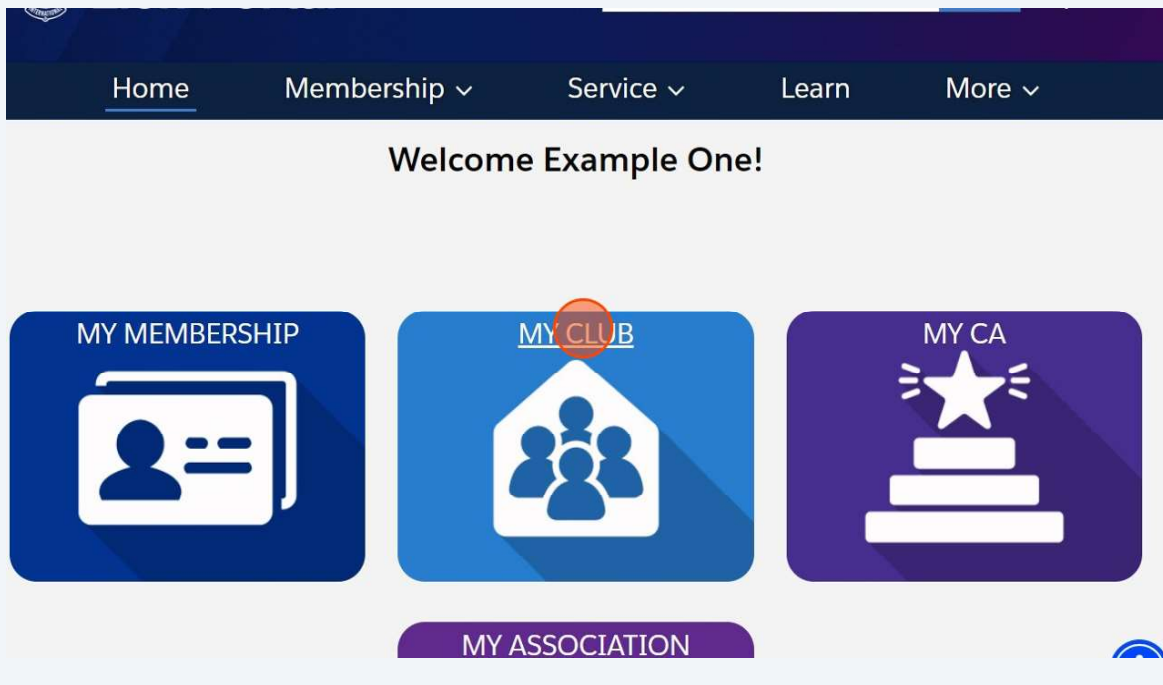
Add - Transfer to the New Club

ⓘ   These steps are done by the Officer or Administrator of the **new** Club. This creates a new "Membership" record with the new Club to track the history of the member.

8   The Officer or Administrator of Club to receive the transferred member is signed in to the portal.

9   Click "MY CLUB"

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Welcome Example One!

MY MEMBERSHIP

MY CLUB

MY CA

MY ASSOCIATION

10   Click "Manage Club Members"

11   Select the "Radio Button" next to "Transfer Member" and click "Next"

12 To locate the member you can search by "Name" or "Lion ID". Enter the data and click "Search"
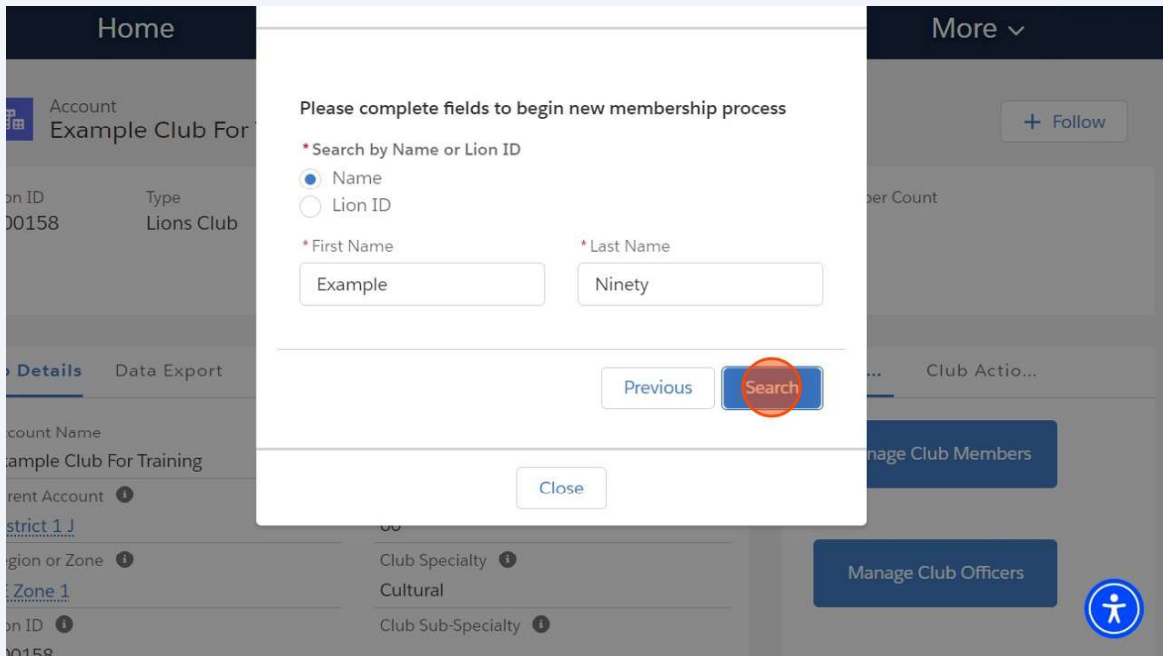
13 Select the member by clicking the "Radio Button" next to the member name and click "Next"

14 Confirm the Membership of the member.
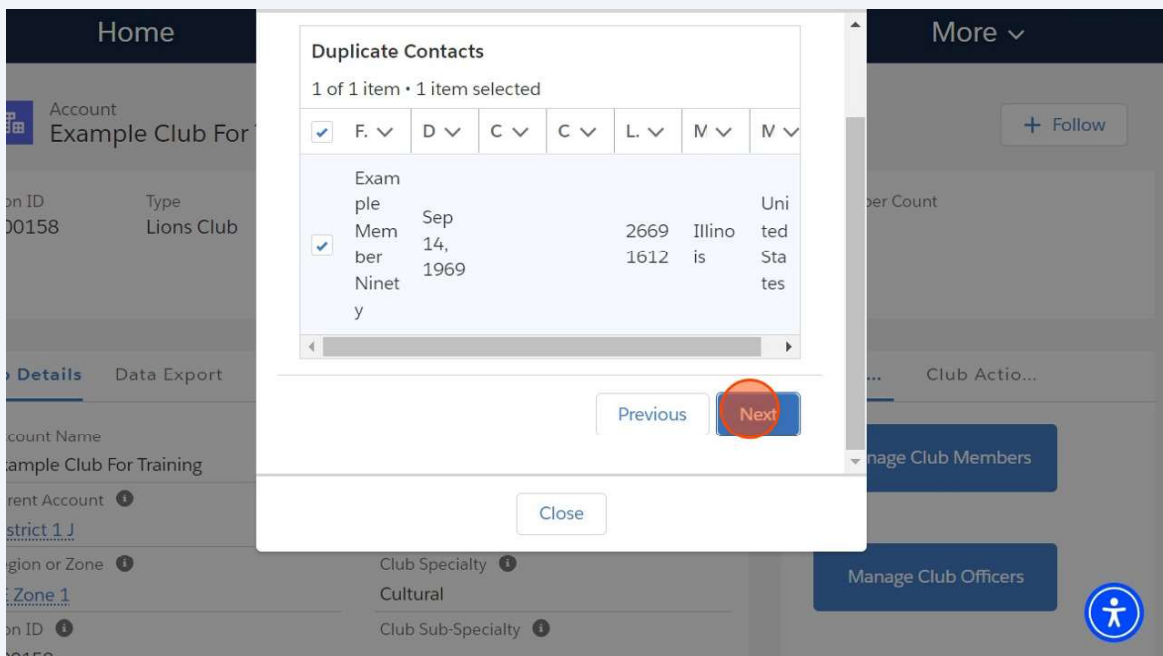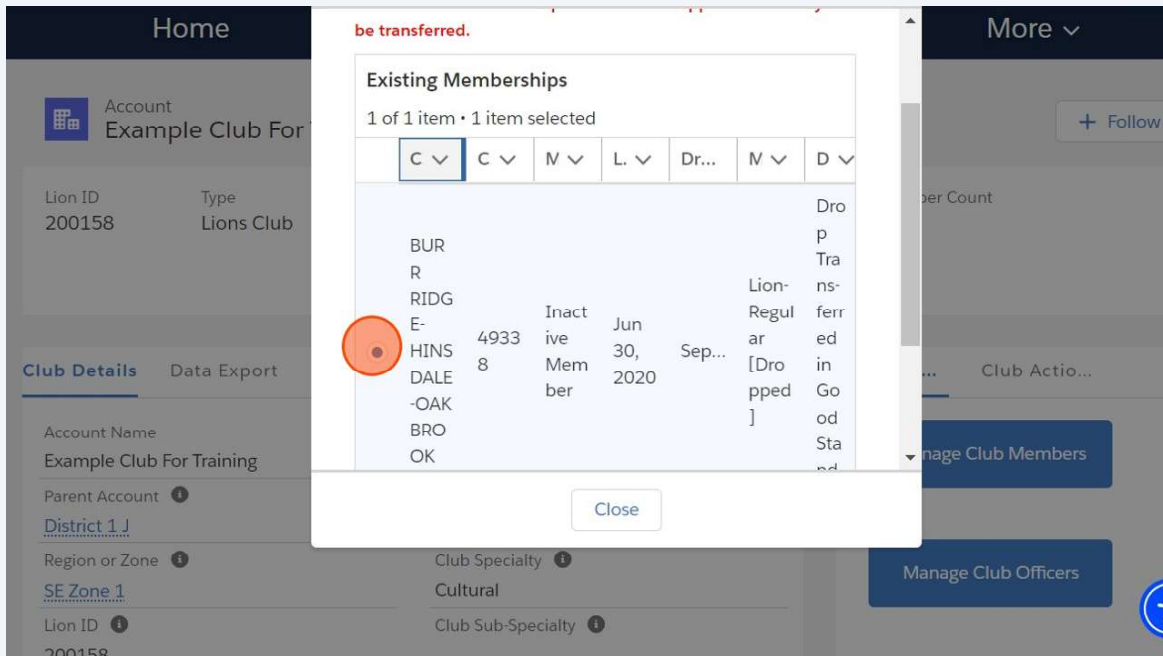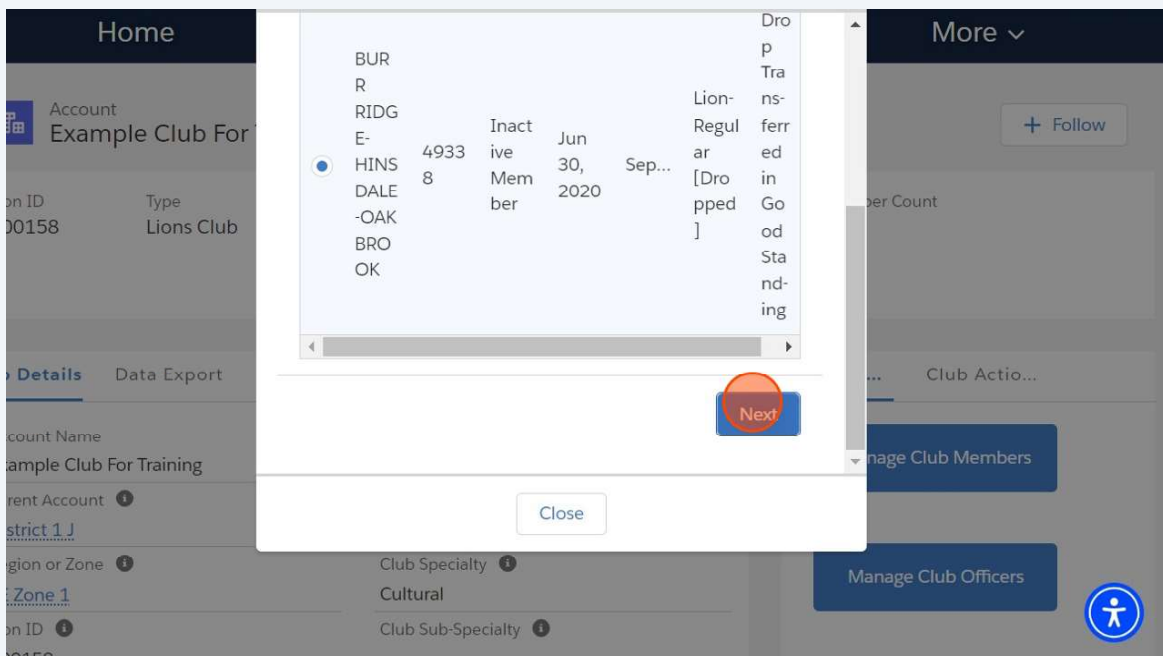

15 Click "Next"

16 Enter the "Membership Start Date", Select the "Membership Type" option, "Membership Category" and click "Next".

17 A green Success message is displayed. Click the "X" icon to close the message.

18 The Club Detail tab is displayed.

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Account
Example Club For Training   + Follow

on ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place	61
			Naperville, Illinois 60565	
			United States	

| Details | Data Export | Club Statements | Club Service Activities | More | | Member ... | Club Acti... |

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Zone 1

n ID ⓘ

Type ⓘ
Lions Club

Active Member Count
61

Club Specialty ⓘ
Cultural

Club Sub Specialty ⓘ

Manage Club Members

Manage Club Officers

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19 Click "Home" to return to the portal landing page

🦁 **Lion Portal**   Search [Search] 🔔 👤

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Account
Example Club For Training   + Follow

Lion ID	Type	Status	Billing Address	Active Member Count
200158	Lions Club	Active	124 Any Place	61
			Naperville, Illinois 60565	
			United States	

| **Club Details** | Data Export | Club Statements | Club Service Activities | More | | Member ... | Club Acti... |

Account Name
Example Club For Training ✎

Parent Account ⓘ

Type ⓘ
Lions Club

Active Member Count

Manage Club Members

20   This concludes the "Manage Club Members - Transfer A Member" Quick Guide

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Welcome Example One!

MY MEMBERSHIP

MY CLUB

MY CA

MY ASSOCIATION
LIONS