

eAdventist

technology for churches

In-Class Exercises: Set 2 Transfers for Church Clerks

For the eAdventist Demo Site

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EXERCISE 1: ONLINE CHURCH TO ONLINE CHURCH TRANSFER

*Instructions for the following found in **Transferring Members** in the User Guide*

If you are currently in a class, your instructor will now assign a practice partner to you. Alternate roles with your partner, first acting as the **Requesting Clerk** (Exercise 1A) and then acting as the **Granting Clerk** (Exercise 1B).

If you are NOT in a class, but working on your own, you need another church clerk to be your practice partner for Exercise 1. If you do not know a clerk to practice transfers with, contact your conference membership clerk and ask for help finding a practice partner. When you have a partner, complete one transfer as the **Requesting Clerk** (doing only the steps in Exercise 1A) while your partner is the **Granting Clerk** (and doing only the steps in Exercise 1B). Then reverse roles and do another transfer with your practice partner.

NOTE: If the transfer does NOT work as explained in these exercises, contact your conference membership clerk and verify that your church in the Demo database has been marked as being “online”. If your church has not been set up properly, transfers will not work as expected.

See following pages for Exercise 1A and Exercise 1B

EXERCISE 1A – REQUESTING CLERK

In Exercise 1A you will act as the **Requesting Clerk** and enter an online request for a member to transfer from the church of your practice partner (the **Granting Clerk**), INTO your church.

Ask your practice partner for the full name of one of the members in their church so that you can request the transfer (they should have a “Harold” if they have done in-class exercises; if not, ask for another member’s name that they have entered). Also ask what church your practice partner is assigned to and record the information here (when you are processing real transfers, an individual will contact you and give you their name and the church they want to transfer from):

Full name of member you are going to request _____

Practice partner’s church (granting church) _____

**RIGHT NOW, THE GRANTING CLERK HAS NOTHING TO DO.
YOUR PRACTICE PARTNER IS WAITING FOR YOU
TO COMPLETE STEPS 1-8 OF EXERCISE 1A**

1. Click the purple **People** menu item on the left, then click **transfers**.
2. Click the “Request Transfer” button.
3. On the **Request Transfer** page), click the “Select” link to choose the member’s current church (the granting church. This will open the **Select Church** window.
4. In the **Select Church** window, type in part of the church name that the member is transferring from (you wrote it down before starting this exercise), and click the “Search” button.
5. All churches whose name contains the letters you entered in the **Church name** field will be displayed. Click in the circle to the left of the correct church and click the “Ok” button.
6. The name of the church will be displayed in the **To clerk of** field. Select **your** church in the **To join** field and enter the member’s name (which you wrote down earlier) in the **Last name** and **First name** fields. The **Middle name**, **Suffix** and **Birth date** are optional fields.
7. Click the “Save” button to create the transfer request. eAdventist will notify the other clerk of the request.

8. Notice that this transfer request is listed on the **To grant** tab, but has a **yellow** light beside it. Yellow means that you need to **wait** for the other clerk to grant this request. Once this request has been granted by the other clerk, it will display on the **To accept** tab and have a **green** light, meaning it is your turn to **go** and vote on the transfer. But for now, you get to wait.

**WAIT FOR YOUR PRACTICE PARTNER, THE GRANTING CLERK,
TO COMPLETE STEPS 1-5 OF EXERCISE 1B**

If you are in a classroom, click the yellow **Home** menu section and select the “home” menu item underneath, then watch the number of “Transfers To Accept” displayed. Continue to “refresh” your screen and when that number goes up by one your practice partner has completed Steps 1-5 of Exercise 1B and granted your transfer request. If you are NOT in a classroom, but working independently, you will probably have a delay in finishing the transfer...actually a more accurate representation of what really happens with transfers. When you log back into the program, check and see if the “To Accept” number has gone up, at which point your partner will have completed Steps 1-5 of Exercise 1B.

**WHEN YOUR PARTNER, THE GRANTING CLERK,
HAS COMPLETED STEPS 1-5 OF EXERCISE 1B, CONTINUE WITH STEP 9**

9. Click the **Transfers to Accept** link in the middle of the **Welcome to eAdventist** (home) screen.
10. Notice that your transfer automatically moved to the **To accept** tab and now has a **green** light. The other clerk has granted your request and this is when you would take this request to your church board or pastor for voting by your church body. Once that has happened, or since you are just practicing, click the **View** link.
11. On the **Transfer** page, you will 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 the vote was taken, (e.g. September 3, 2013 in mm/dd/yyyy format) and click the “Save” button.
13. The program returns you to the **Transfer** page and shows that the individual is now a member of your church.
14. Just to double-check that the individual made it to your church, click the member’s name on the right section of the screen. It should be a link, indicating that you can access it.
15. The **Person** page 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 is not a member of your church, you will see their name and church info, but will not be able to access their records.
16. This member has been successfully transferred into your church.

ASK YOUR PRACTICE PARTNER TO REVERSE ROLES AND TO NOW ACT AS THE REQUESTING CLERK (PERFORM STEPS IN EXERCISE 1A) AND YOU ACT AS THE GRANTING CLERK (PERFORM STEPS IN EXERCISE 1B)

EXERCISE 1B – GRANTING CLERK

In Exercise 1B you will act as the **Granting Clerk** and grant an online request for a member to transfer OUT of your church and into the church of your practice partner, who is acting as the **Requesting Clerk**.

WAIT FOR YOUR PRACTICE PARTNER, THE REQUESTING CLERK, TO COMPLETE STEPS 1-8 OF EXERCISE 1A

If you are in a classroom, click the yellow **Home** menu section and select the “home” menu item underneath and watch the number of “Transfers to Grant” displayed. Continue to “refresh” your screen and when that number goes up by one your practice partner has completed Steps 1-8 of Exercise 1A and entered a request. If you are NOT in a classroom, but working independently, you may have a delay in processing the transfer...actually a more accurate representation of what really happens with transfers. When you log into the program, check and see if the “Transfers to Grant” number has gone up, at which point your partner will have completed Steps 1-8 of Exercise 1A.

WHEN YOUR PARTNER, THE REQUESTING CLERK, HAS COMPLETED STEPS 1-7 OF EXERCISE 1A, GO TO STEP 1

1. Click the **Transfers to Grant** link in the middle of the **Welcome to eAdventist** (home) screen.
2. The transfer request that has been sent to you will show up on the **To grant** tab and will have a **green** light, indicating that you are to **go** and do something with this transfer. In this case, take the transfer request to your church board or pastor for your church body to vote on. Once the vote has occurred, come back to this screen, or since you are just practicing, click the **View** link beside the correct transfer request.
3. The **Transfer** screen will show that the transfer has been requested. Click the “Grant/Deny” button to enter your vote.
4. The **Process Transfer Request** screen will display any of your members that match the requested name (first 4 characters of the last name AND first 2 characters of the first name that the other clerk entered). This allows you to find the correct member even if the other clerk misspelled your member’s name. Click in the circle to the left of the correct individual to transfer.
5. Click in the circle next to “Granted”, enter the **Voted** date (e.g. July 9, 2013 in mm/dd/yyyy format), and click the “Save” button.
6. 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.

7. 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 this person into their church.

**WAIT FOR YOUR PRACTICE PARTNER, THE REQUESTING CLERK,
TO COMPLETE STEPS 9-12 OF EXERCISE 1A**

If you are in a classroom, click the yellow **Home** menu section and select the “home” menu item underneath and watch the number of “Transfers out” displayed. Continue to “refresh” your screen and when that number goes up by one your practice partner has completed Steps 9-12 of Exercise 1A and entered the acceptance. If you are NOT in a classroom, but working independently, there may be a delay in finishing the transfer...actually a more accurate representation of what really happens with transfers. When you log back into the program, check and see if the “Transfers Out” number has gone up, at which point the other clerk will have completed Steps 9-12 of Exercise 1A.

**WHEN YOUR PARTNER, THE REQUESTING CLERK,
HAS COMPLETED STEPS 9-12 OF EXERCISE 1A, CONTINUE WITH STEP 8**

8. Click the **Transfers out** link in the middle of the **Welcome to eAdventist** (home) screen.
9. Note that the member’s transfer now displays on the **Completed** tab, meaning that the other church clerk has accepted the member. If you do not see the completed transfer, increase the value in **Days to show** and click the “Save setting”. Check the **Completed** tab again.
10. Search for the member by clicking on **search** (under the **People** menu section).
11. Enter the last name in the **Last name** field and click the “Search” button.
12. You should see any other of member’s family listed in the search results, but the outgoing member no longer is.
13. If the member you transferred out has other family members remaining in your church, click to select one of them. You should see that the outgoing member is now shown as a member in your practice partner’s church.
14. You have successfully granted the transfer of a member to your practice partner’s church.

**ASK YOUR PRACTICE PARTNER TO REVERSE ROLES AND TO NOW ACT AS
THE GRANTING CLERK (PERFORM STEPS IN EXERCISE 1B) AND YOU ACT AS
THE REQUESTING CLERK (PERFORM STEPS IN EXERCISE 1A)**

EXERCISE 2: TRANSFER SOMEONE TO AN OFFSYSTEM CHURCH

Instructions for the following found in *Transferring Members in the User Guide*

In this exercise, you will work independently and practice processing a request from an offsystem church for one of your church's members.

NOTE: If the transfer does NOT work as explained in these exercises, contact your conference membership clerk and verify that your church in the Demo database has been marked as being "online". If your church has not been set up properly, transfers will not work as expected.

If you receive a "Request for Transfer of Church Membership" by postal mail or email, it means that the church that sent it is an "offsystem" church (i.e. outside of North America), otherwise the request would have come via eAdventist.

For our example, we are going to assume that the offsystem church is requesting Allen [yourlastname], a member entered in earlier in-class exercises. If you are doing these exercises outside of a classroom setting, find a current member of your church to practice transferring out and substitute that individual's name for Allen's in our examples.

Record full name of member to transfer out _____

1. It is a good idea to verify that the individual is actually a member of your church. Click on the **People** menu section and click "**search**". On the **Person Search** screen, type in the first few letters of the last name of the person transferring out (the name you wrote above, in our example we are going to use "Allen Smith" as our member) and click the "**Search**" button.
2. If the individual name displays with your organization name and the status of "Member", then he or she is indeed a member of your church.
3. To begin the transfer request process, click the **transfers** menu item.
4. Because the **offsystem** church clerk does not use eAdventist, the request will have come by postal mail or email. **You** will need to enter the request **on their behalf** in eAdventist. 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 the other clerk's request). Then click the "Select" next to the **To join** field to select the church your member will be transferring to.
7. If you had a request for a real transfer, you would select the church name on the request. Since we are just practicing, choose any offsystem 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 that is offsystem (indicated by a †) by clicking in the circle to the left of the name and then clicking on the “Ok” button. (NOTE: If a church you are looking for does NOT display when you search for it, EITHER the name does not match exactly and you need to change your search criteria OR the foreign church does not exist in eAdventist and a request needs to be entered to create it).
9. The name of the offsystem church will automatically be displayed in the **To join** field. Enter the last name and first name of the person you are transferring and click the “Save” button.
10. The transfer is now ready to be voted by your church. Notice the **green** light indicating that it is your turn to **go** and take the transfer request to your church board or pastor so that your church body can vote on it. Once the vote has occurred, come back to this screen, or since you are just practicing, click the **View** link beside the correct transfer request.
11. The **View** link will take you to the **Transfer** screen. Click the “Grant/Deny” button to enter your vote.
12. The **Process Transfer Request** screen will display all of your members that match the requested name (first 4 characters of the last name AND first 2 characters of the first name). This is to help you find the correct member even if you misspelled the name. Click in the circle to the left of the correct individual to transfer.
13. Click in the circle next to “Granted” and enter the **Voted** date (e.g. July 16, 2013 in mm/dd/yyyy format), and click the “Save” button.
14. This will take you back 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 locate the transfer. It now has a **yellow** light indicating that you must **wait** since there is nothing further that you will need to do with this transfer. It will be displayed on your **Completed** tab once the acceptance date has been entered.
16. How will the acceptance date get entered? Your conference membership clerk is now in control of this transfer. Notice that the **Printed** column says “Pending”.
17. The next time your conference membership clerk does a transfer mailing, a report will be sent to the offsystem church asking for an acceptance date. When your membership clerk has printed and mailed it, you will see the print date (note that this date may not show on the demo site since the conference clerk may not run the report for practice transfers).
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 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. 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** link 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 offsystem church.

EXERCISE 3: TRANSFER SOMEONE FROM AN OFFSYSTEM CHURCH

In this exercise, you will work independently and practice completing a transfer of someone coming to your church from an offsystem church.

NOTE: If the transfer does NOT work as explained in these exercises, contact your conference membership clerk and verify that your church in the Demo database has been marked as being “online”. If your church has not been set up properly, transfers will not work as expected.

Whenever someone is coming **to** your church, whether they are coming from an online, offline, or offsystem church, you always start the transfer 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 window, enter a portion of the church name in the **Name containing** field and click the “Search” button.
5. For this example, find a church that is offsystem (indicated by the †), click in the circle next to that church, and 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 purposes of practicing), 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 grant date to be entered. 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 offsystem church
8. Once your conference membership clerk has printed and mailed this request to the offsystem church, the **Printed** date will be filled in (note that this date may not get filled in on the demo site because the conference clerk may not print the practice transfers).
9. In reality, once your conference clerk mails the form to the offsystem church, there will be a few weeks before it is returned to her with the grant date filled in. At that time, she will either enter the grant vote and the transfer will display on your **To accept** tab the next time you log in. eAdventist will also send you an email notification. If the offsystem church inadvertently returns their grant vote to you, forward it to your conference membership clerk so that she can enter it. For this exercise, she will need to enter the grant vote in order for you to continue.

10. When she enters the grant vote, there will be an important difference from normal transfers. The offsystem church is not using eAdventist, so there is 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, click “**new family**” under the **People** menu section (you could 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 has an eAdventist record as a nonmember, which can be selected for the transfer (NOTE: this is the only situation in which a nonmember record can be transferred).
13. After your conference clerk has entered the offsystem church’s grant vote, click **transfers** under the **People** menu section.
14. Locate 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 mm/dd/yyyy format). Notice that eAdventist provides the option of entering the member’s original membership method and date (how they first joined the Seventh-day Adventist denomination) in the **Member by** and **Membership date** fields. If you did **not** receive that information from the offsystem church, just ignore those fields and 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 (names that are not underlined 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 later receive the member’s original baptism date, you can enter it on this tab in the **Membership date** field.
20. You have successfully transferred someone from an offsystem church. Note that your conference membership clerk must perform Step 10. For real transfers, it is best to enter the nonmember record (Step 11) BEFORE entering the transfer request so that the nonmember record is available when your conference membership clerk receives the offsystem church’s vote.