

# 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](https://lionportal.org)

## Drop - Transfer From Old Club

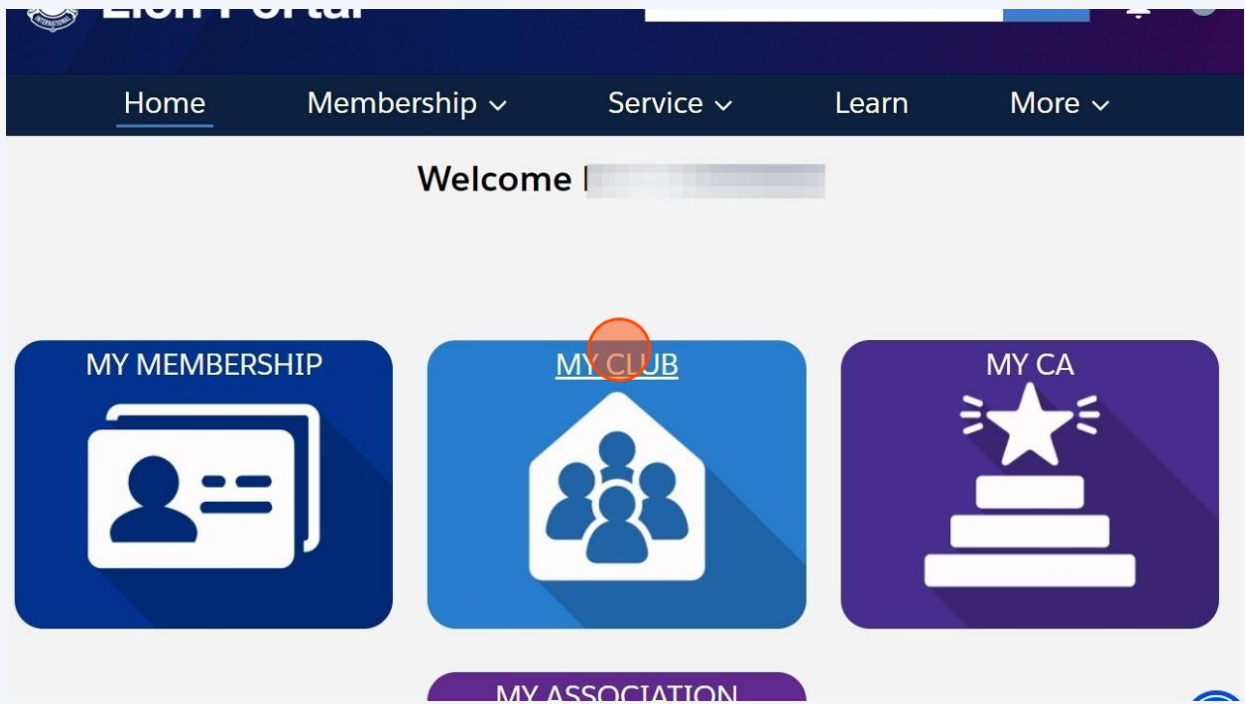


**Alert!** To transfer a member into your Club the member needs to be dropped from their current club. The steps shown in this section are performed by the other club.

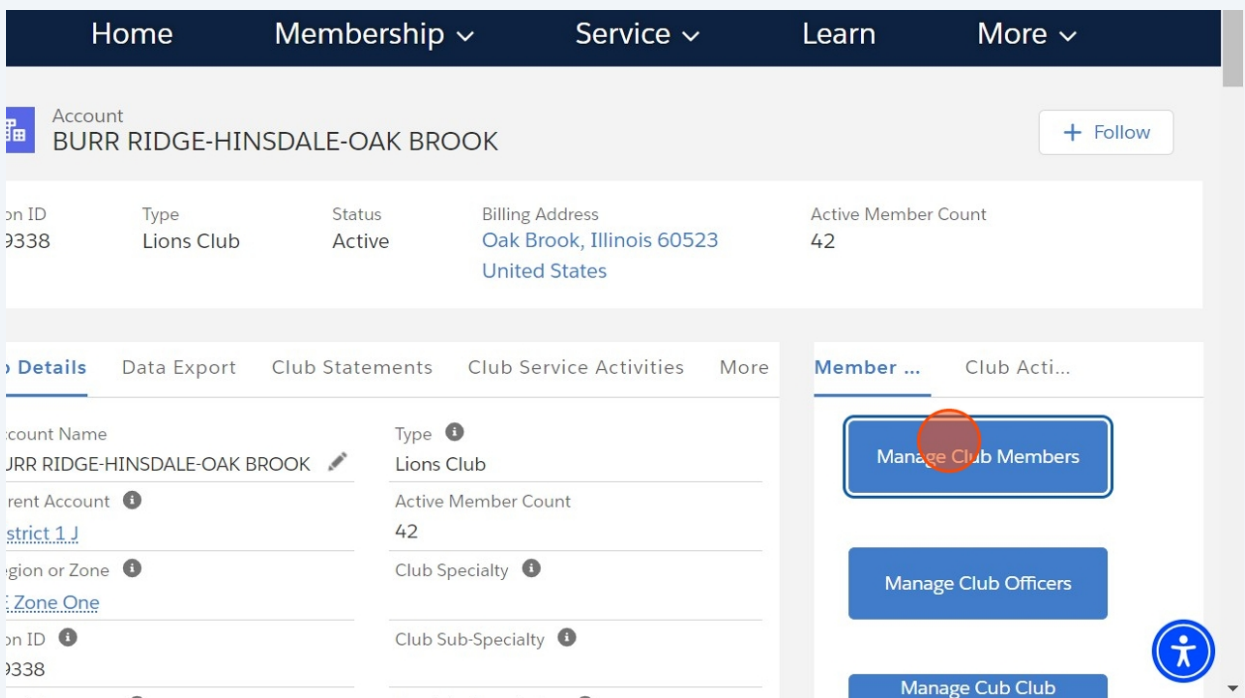


This step is done by the Officer or Administrator of the **current** Club. Once the membership of the Member has been dropped the Officer or Administrator of the new club can transfer the member into the new club. This creates a new "Membership" record for the history of the member.

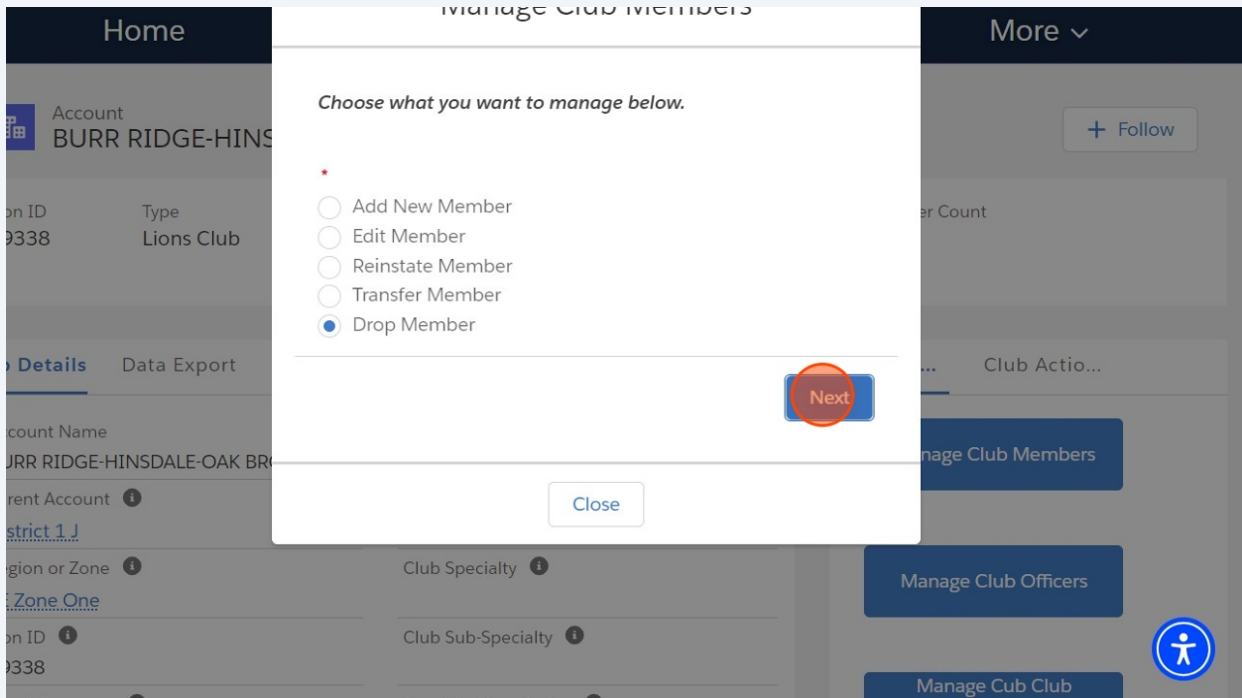
2 Click "MY CLUB"



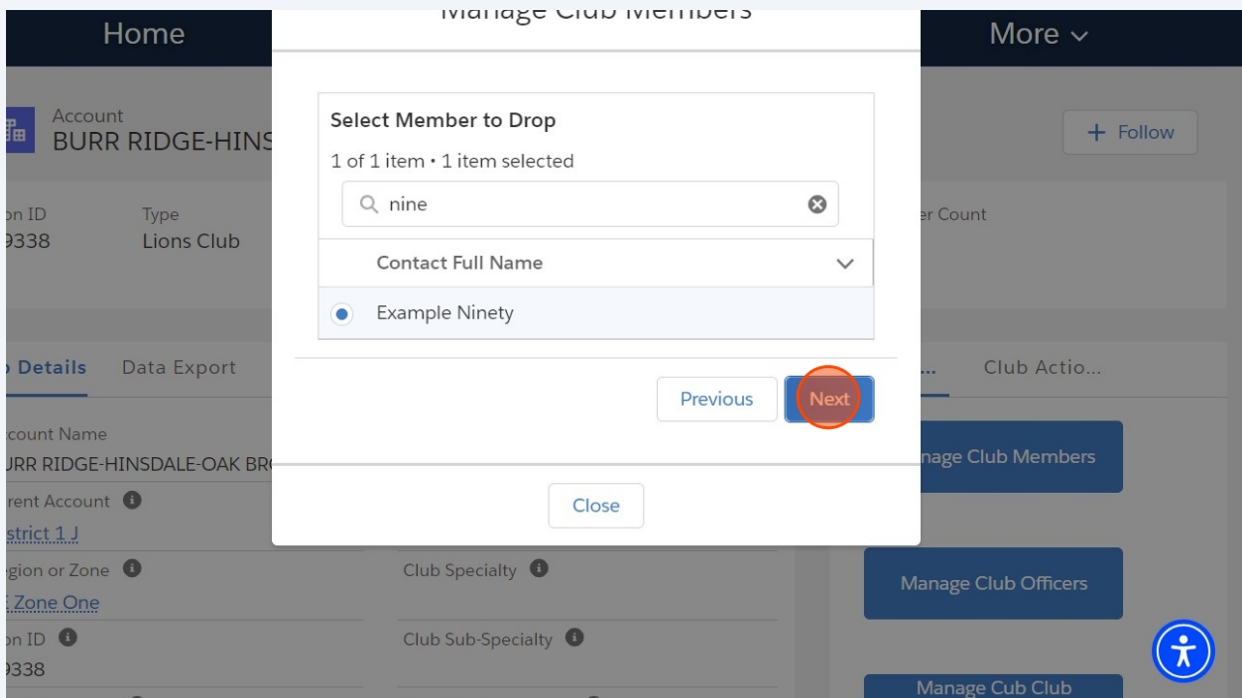
3 Click "Manage Club Members"



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.

Home

Account  
Burr Ridge-Hinsdale

Lion ID 49338 Type Lions Club

Club Details Data Export

Member Name: Example Ninety  
Member's ID: 26691612

\* Membership End Date  
Sep 1, 2024

\* Drop Reason ⓘ  
Transferred

Drop Reason Details

Save

Close

7

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

Home

Account  
Burr Ridge-Hinsdale

Lion ID 49338 Type Lions Club

Club Details Data Export

Member Name: Example Ninety  
Member's ID: 26691612

\* Membership End Date  
Sep 1, 2024

\* Drop Reason ⓘ  
Transferred

Drop Reason Details  
Moving to Example Club For Training

Save

Close



The member has been dropped from their current club.

## Add - Transfer to the New Club



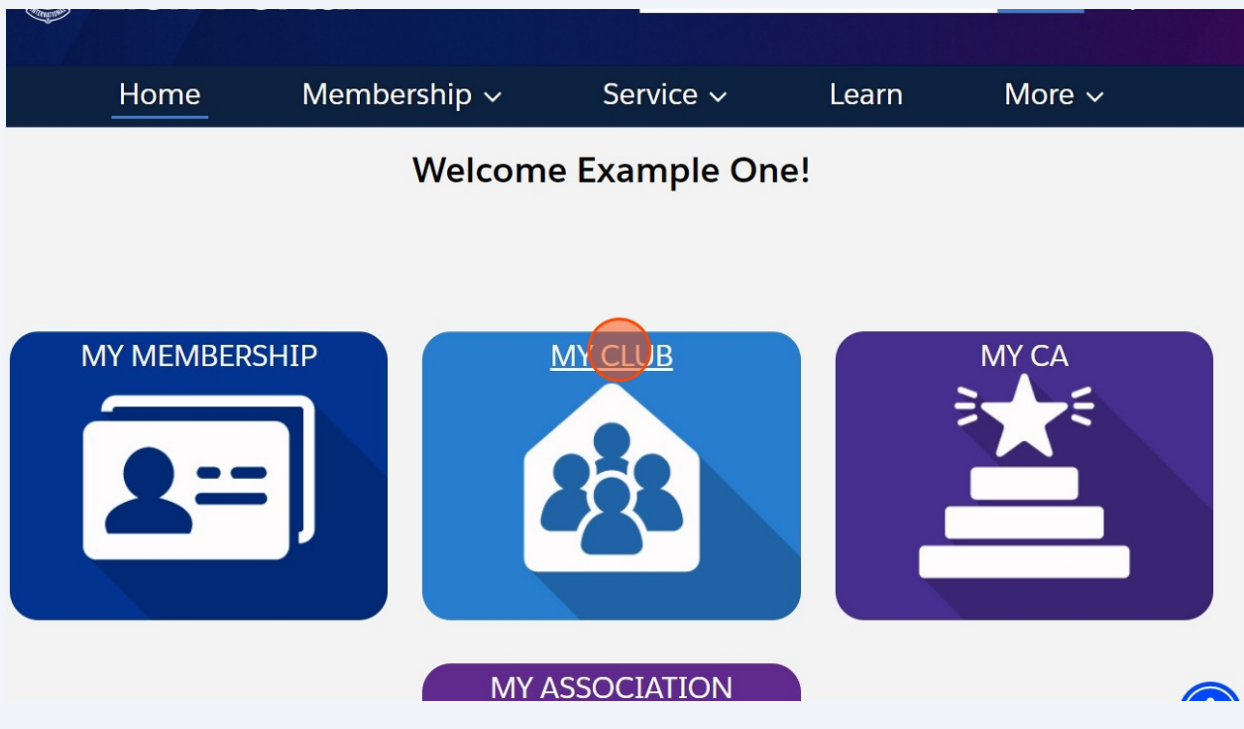
These steps are done by the Officer or Administrator of the **new** Club. This creates a new "Membership" record with the new Club to track the history of the member.

8

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

9

Click "MY CLUB"



10 Click "Manage Club Members"

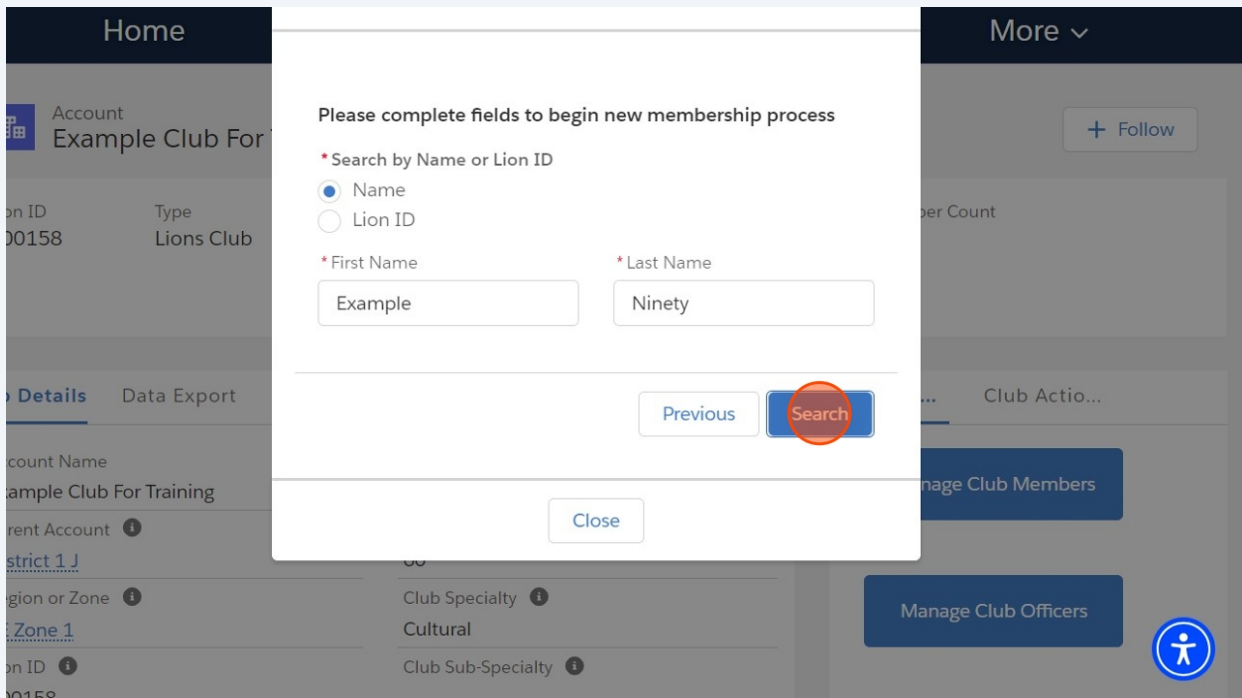
The screenshot shows the top navigation bar with 'Home', 'Membership', 'Service', 'Learn', and 'More'. Below is the club header for 'Example Club For Training' with a '+ Follow' button. A table lists club details: Club ID (00158), Type (Lions Club), Status (Active), Billing Address (124 Any Place, Naperville, Illinois 60565, United States), and Active Member Count (60). Below the table are tabs for 'Details', 'Data Export', 'Club Statements', 'Club Service Activities', and 'More'. The 'Details' tab is active, showing fields for Account Name, Parent Account, Region or Zone, Club ID, Type, Active Member Count, Club Specialty, and Club Sub-Specialty. On the right, there are two blue buttons: 'Manage Club Members' (highlighted with a red circle) and 'Manage Club Officers'. A user profile icon is visible in the bottom right corner.

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

The screenshot shows the 'Manage Club Members' dialog box overlaid on the club details page. The dialog box has a title bar 'Manage Club Members' and a subtitle 'Choose what you want to manage below.' Below the subtitle is a list of radio button options: 'Add New Member', 'Edit Member', 'Reinstate Member', 'Transfer Member' (which is selected with a blue dot), and 'Drop Member'. At the bottom of the dialog box are two buttons: 'Next' (highlighted with a red circle) and 'Close'.

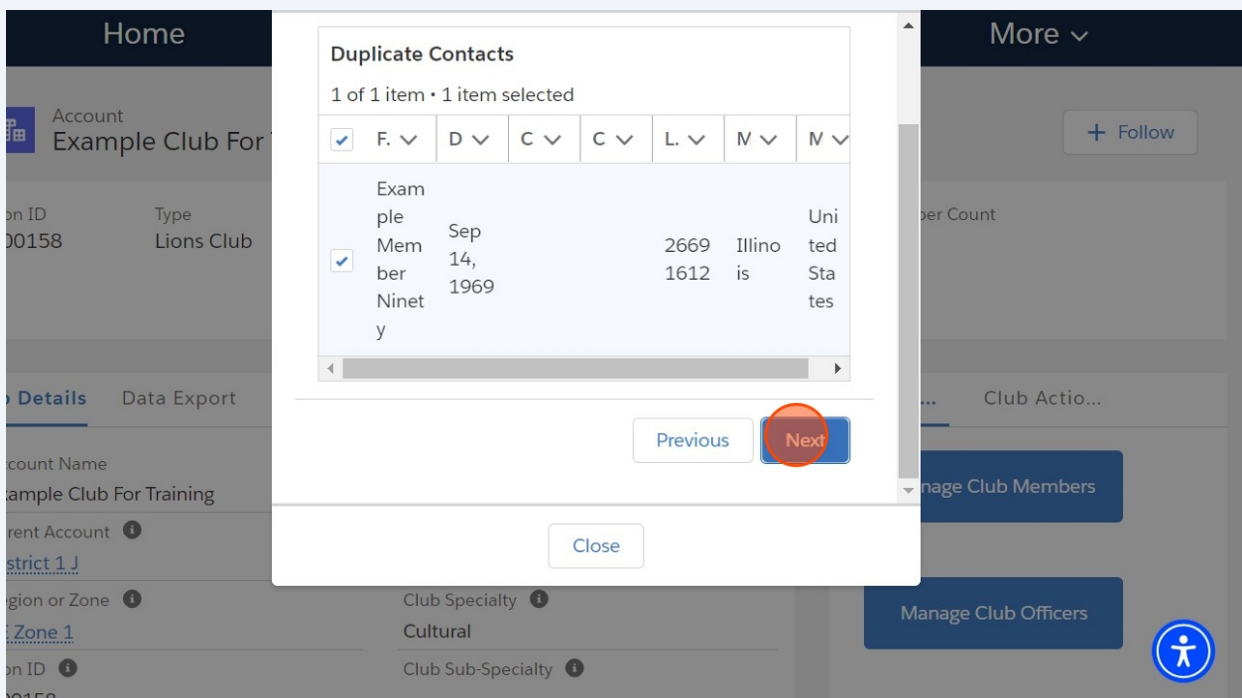
12

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.

The screenshot shows a web application interface with a modal window titled "Existing Memberships". The modal displays a table with one selected item. A red circle highlights the first row of the table.

C	C	M	L	Dr...	M	D				
BUR	R	RIDG	E-	4933	Inactive	Member	Jun 30, 2020	Sep...	Lion-Regul ar [Dro pped ]	Dro p Tra ns-ferr ed in Go od Sta nd-

Buttons: Close

15 Click "Next"

The screenshot shows the same web application interface as in step 14, but with a red circle highlighting the "Next" button at the bottom right of the modal window.

Buttons: Next, Close



16

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

Home Manage Club Members More ▾

Account Example Club For Training

\* Membership Start Date Sep 10, 2024

\* Membership Category Active

\* Membership Type Regular Member

Next

Close

17

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

Lion Po

Success! Membership Record Created!

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club For Training + Follow

Account ID	Type	Status	Billing Address	Active Member Count
00158	Lions Club	Active	124 Any Place Naperville, Illinois 60565 United States	60

Details Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Active Member Count

Manage Club Members

18 The Club Detail tab is displayed.

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club For Training [+ Follow](#)

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

**Details** Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Parent Account Active Member Count 61

Region or Zone Club Specialty Cultural

[Manage Club Members](#)

[Manage Club Officers](#)

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

Lion Portal Search

Home Membership ▾ Service ▾ Learn More ▾

Account Example Club For Training [+ Follow](#)

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

**Club Details** Data Export Club Statements Club Service Activities More

Account Name Example Club For Training Type Lions Club

Parent Account Active Member Count

[Manage Club Members](#)

20

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

