

Background

There are times when you need to move a member from one family to another. This tip sheet shows how to do this quickly.

Locate/Mark New Family

Usually, you need to create the new family, or it is already created and is empty. If you need to search for it, use the Global Search and search by Email address.

Once you have located the new family, edit the family name and add a period to the beginning. So if the family is Clover, rename it to .Clover to make it easier to find in a later step.

Move The Member

These steps need to be followed carefully or the member could be lost.

1. Go into the member's record and click on Profile in the upper left menu.
2. Scroll to Families section at the bottom.
3. Click on the Move button.
4. In the box that appears, select your county in the Family County drop down box.
5. In the Families drop down box, select the family you wish to move the member into. Since you renamed the family in the section above, it should appear at the top of the list.
6. Double check the County and Family are correct and then click on the Move button.
7. Click on the Confirm button.

Rename The New Family

Click on the orange up arrow in the upper right corner to return to the search screen.

Click on the Member from the search screen and then click on Member List in the upper left menu. You should see the new family you moved the member into.

Rename the family, removing the leading period from the name.

Two Household Families

For split families, this method can be used to ADD the member to a second family. Instead of clicking on the Move button in step 3 of Move The Member section, click on the Add button.

Adding a member to a second family allows both families to manage the member record. The primary family can enroll the member, and both can register for events. Once the enrollment is approved, both families can add/remove projects. Both families will receive broadcast emails when you select "Send to Families".

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