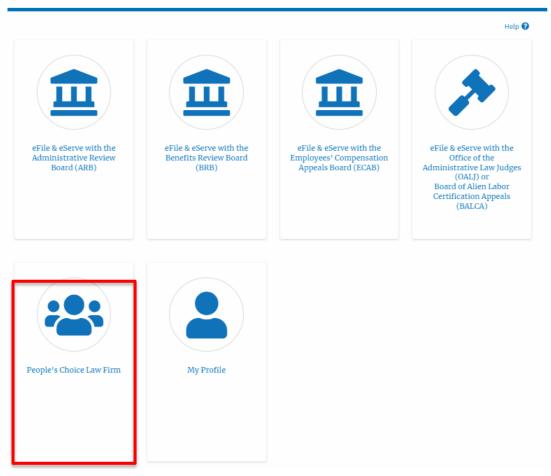


HOW DO YOU TRANSFER CASES FROM ONE ACCOUNT TO A NEW ACCOUNT AS AN ADMINISTRATOR?

- 1. If you are not logged in already, follow the steps below
 - a. Log in as the organization administrator.
 - b. Click on the Organization Name tile.

Dashboard



3. Or if you navigate from the My Accounts menu and My Organizations submenu, click on the name of the organization you wish to manage.

My Organizations

Add Organization Searc	h Organiza	tions					Help 🝞
Organization	Туре	Website	Contact Name	Contact Email	Contact Number	Address	Actions
People's Choice Law Firm	Public		Attorney Two			554004 NE.444 ST , Ohio , United States	Edit

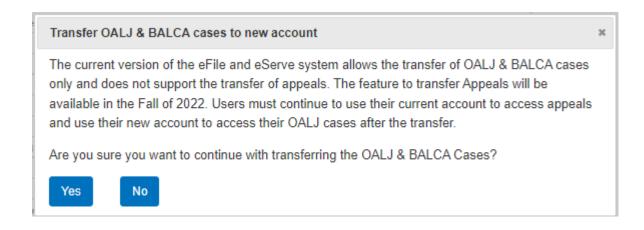


4. Click on the "Account Transfer" button.

Organization Details

Details	Cases	Appeals	Members	Mailboxes	Account Transfe
Organization Name	People's C	hoice Law Firm			
Address	554004 NE	.444 ST			
Country	United Sta	ites			
State	Ohio				
City	Cincinnati				
Zipcode	45201				
Organization Email					
Organization Type	Public				
Website					
Administrator 1 Name					
Administrator 1 Email					
Administrator 1 Contact Number					
Administrator 2 Name	Attorney T	'wo			
Administrator 2 Email			•		
Administrator 2 Contact Number	999999999	99			

5. Click on the "Yes" button in the pop-up displayed.



6. Click on the "How to Initiate Account Transfer" link to view all the details to be taken care of before initiating a case transfer.



Account Transfer

How to Initiate Account Transfer

Transfer-From Organization

People's Choice Law Firm, 554004 NE.444 ST

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Transfer to another account within the same Organization

Transfer-To Organization

Search for the organization to transfer to

Search using Organization id, name or email address

Instructions for entering Account Details below

Enter Transfer-From and Tranfer-To account pairs in this format, one pair per line current_email1@example.com,new_email1@example.com current_email2@example.com,new_email2@example.com

Account Details *

Transfer-From email, Transfer-To email

Enter the Transfer-From and Transfer-To email pairs separated by comma, one per line.



Cancel



Account Transfer

¥ How to Initiate Account Transfer

Please note

- In order to transfer cases from a current account (Transfer-From email) to a new account (Transfer-To email), the new account with a different email address must already exist.
- In order to ensure that the new account (Transfer-To email) is active and accessible, the new
 account owner must have logged in to the account at least once in the last 7 days.
- If the current account (Transfer-From email) belongs to an organization and the new
 account (Transfer-To email) belongs to a different organization from the current account,
 remove all delegated accesses to cases from the current account before initiating the
 transfer.

Steps

- · Select the Transfer-From Organization if the current account belongs to an organization.
- Search for and select the Transfer-To Organization if the new account belongs to an
 organization.
- Enter the current accounts' (Transfer-From email) and new accounts' (Transfer-To email) email addresses in the Account Details field as comma-separated pairs, one pair per line.
- Click 'Verify Accounts' button. System will verify that the accounts exist and belong to the selected organizations, if any, and that the data can be transferred.
- Account validation errors will be displayed at the bottom of the page, for each account pair in error.
- Errors must be resolved before account transfer can be initiated.
- After addressing validation errors, if any, click the 'Start Transfer' button.
- Confirm the transfer in the pop-up message to initiate the transfer of cases from the current
 accounts (Transfer-From email) to the new accounts (Transfer-From email).
- The current accounts (Transfer-From email) will be locked for submissions until the transfer is completed. This can take upto one hour.
- The current email addresses (Transfer-From email) and the new email addresses (Transfer-To email) will be notified when the transfer is initiated and when the transfer is completed.

Please note that the current version of the eFile and eServe system allows the transfer of OALJ & BALCA cases only and does not support the transfer of appeals. Appeals transfer will be available by the Fall of 2022. Users must continue to use their old account to access appeals and use their new account to access their OALJ cases.

5. Select the checkbox if the new accounts belong to the same organization as the current ones or enter the 'Transfer-To' organization in which the new accounts are a member or skip this if the new accounts do not belong to an organization.



Account Transfer

-	aw Firm, 554004 NE.444 ST	\$
Transfer to a	nother account within the same Organization	
Transfer-To Organiz	ation	
Search for the org	anization to transfer to	(
earch using Organizatio	n id, name or email address	
current_email1@e	n and Tranfer-To account pairs in this format, one pair per line xample.com,new_email1@example.com xample.com,new_email2@example.com	
Account Details *		
current_email1@e	example.com,new_email1@example.com example.com,new_email2@example.com	

- 6. Enter the current and new email addresses of the members as described below.
 - Enter Transfer-From and Transfer-To account pairs in this format, one pair per line
 - current_email1@example.com, new_email1@example.com
 - current_email2@example.com, new_email2@example.com

	mple.com,new_email1@example.com mple.com,new_email2@example.com	
er the Transfer-From and	Transfer-To email pairs separated by comma, one per line.	/
Verify Accounts	Cancel	



 Click on 'Verify Accounts' to verify the email addresses' pairs entered in the 'Account Details' field.

Resolve the validation error messages (if any) displayed at the bottom of the page to proceed to transfer initiation.

	ample.com,new_email1@example.com ample.com,new_email2@example.com	
Enter the Transfer-From a	d Transfer-To email pairs separated by comma, one per l	ine.
Verify Accounts	Cancel	

8. Once the verification is completed, the message "Verification Successful. Click **Start Transfer** button." will be displayed.

Account Transfer
Verification Successful. Click Start Transfer button.
► How to Initiate Account Transfer
Transfer-From Organization
People's Choice Law Firm, 554004 NE.444 ST
Transfer to another account within the same Organization

9. Click on the Start Transfer button displayed at the bottom of the page



eFile and eServe

Enter the Transfer-From and Transfer-To email pairs separated by comma, one per line. Select what to transfer * Transfer Cases	current_email1@example.com,new_email1@example.com current_email2@example.com,new_email2@example.com	
Transfer Cases		

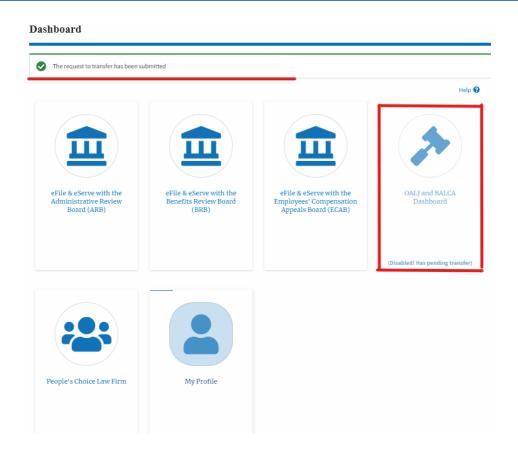
10. Click on the "Confirm" button to start the Transfer of Cases

Account Transfer

Do you want to proce	ed with the transfer?	
Confirm	Cancel	

11. A confirmation message will be displayed on the main dashboard and the OALJ tile will be disabled for all the participating accounts until the transfer is completed.





12. The admin of the organization, the Transfer-From email ids, and Transfer-To email ids receive a transfer initiation email and transfer completion email.

Account Transfer Initiated
EFile Support <efilesupport@dol.gov> TaxC: '</efilesupport@dol.gov>
Dear John Smith,
This is to notify you that the transfer of cases from the account with email and the transfer of cases from the transfer of cases
Thank you,
eFile and eServe
*** DOL TEST SITE ***



Account Transfer Completed



Dear John Smith,

This is to notify you that the transfer of cases from the account with email to the account with email to the account with email initiated by has been completed on 08/11/2022.

Thank you,

eFile and eServe

*** DOL TEST SITE ***