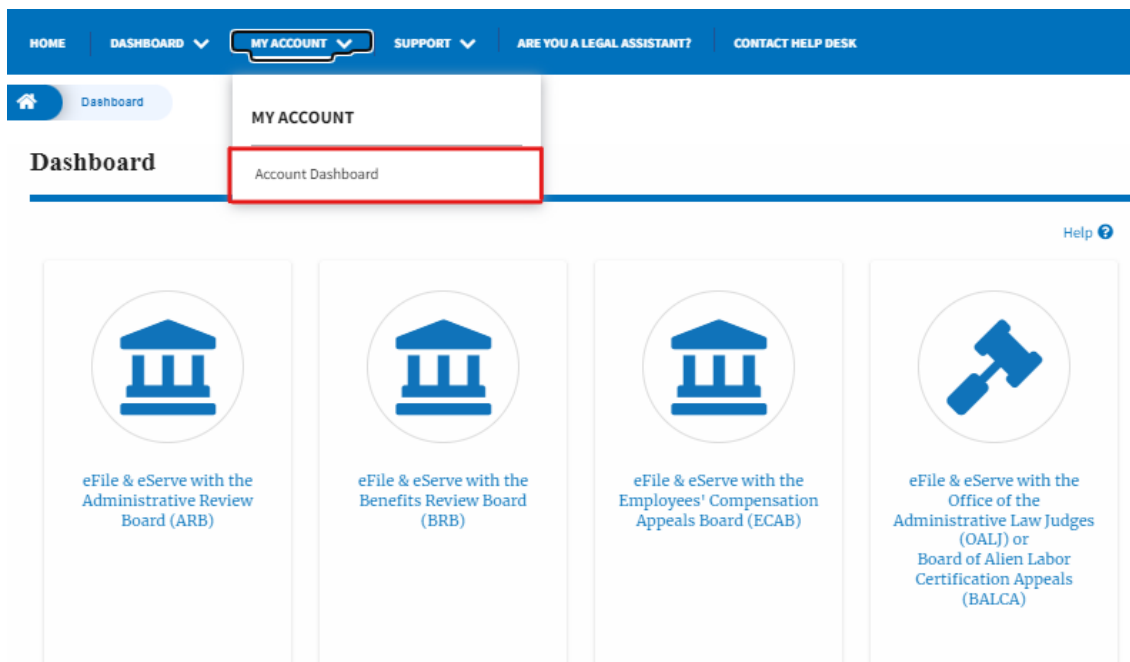




eFile and eServe

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

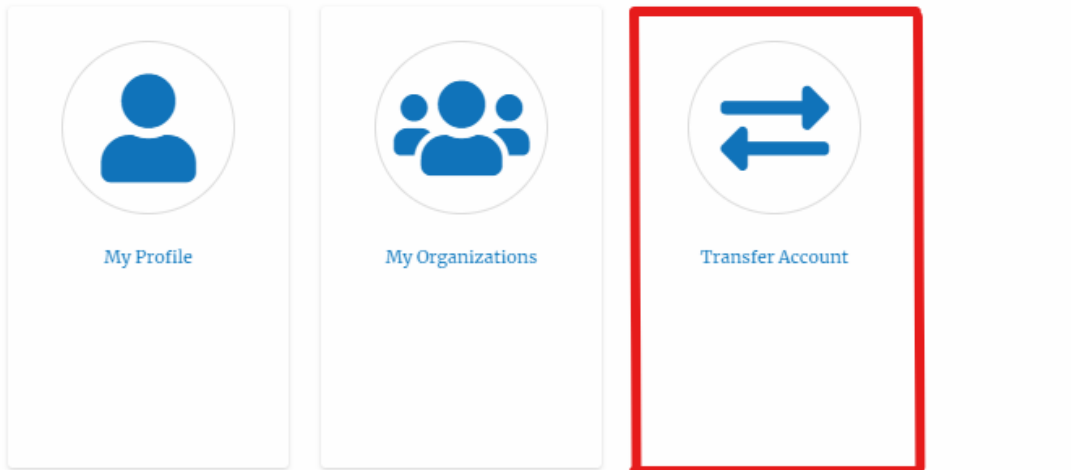
1. If you are not logged in already, follow the steps below
 - a. Log in to the eFile portal.
 - b. Click on the My Account menu.
 - c. Click on the Account Dashboard sub-menu.



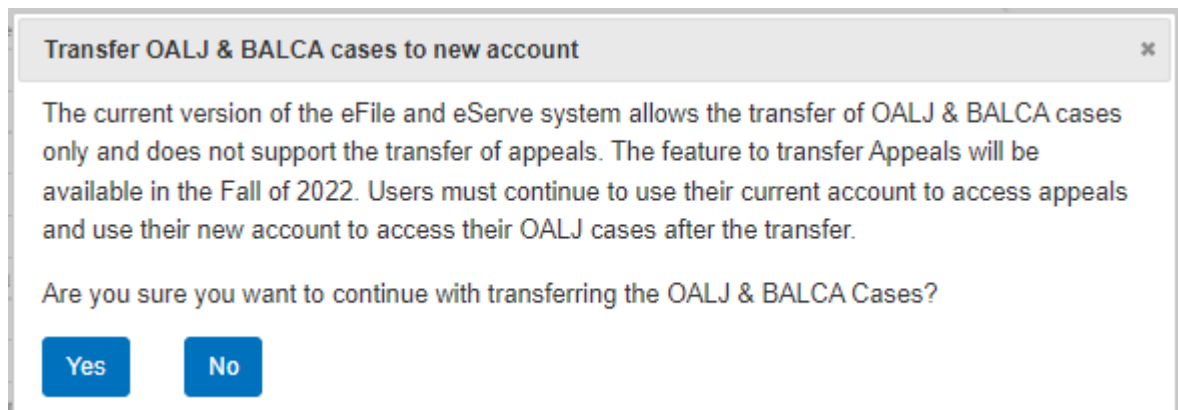
2. Click on the tile 'Transfer Account'.



My Account



3. Click on the “Yes” button in the pop-up displayed.



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



Account Transfer

[▶ How to Initiate Account Transfer](#)

Transfer-To Organization

Search using Organization id, name or email address

Instructions for entering Account Details 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

Account Details *

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

Verify Accounts

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. Enter the 'Transfer-To' organization in which the new account is a member or skip this if the new account does not belong to an organization.



Account Transfer

► How to Initiate Account Transfer

Transfer-To Organization

Search using Organization id, name or email address

Instructions for entering Account Details 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

Account Details *

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

[Verify Accounts](#) [Cancel](#)

6. Enter the current and new email addresses as described below.
 - Enter Transfer-From and Transfer-To account pair in this format
 - current_email1@example.com, new_email1@example.com

Enter the current and new email addresses

Account Details *

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

[Verify Accounts](#) [Cancel](#)



eFile and eServe

7. Click on 'Verify Accounts' to verify the email address 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.

Account Details *


Transfer-From email, Transfer-To email

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

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](#)

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

Account Details *

Transfer-From email, Transfer-To email

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



eFile and eServe

Select what to transfer *

Transfer Cases

Start Transfer Cancel

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

Account Transfer

Do you want to proceed 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.

Dashboard

✓ The request to transfer has been submitted

Help


 eFile & eServe with the Administrative Review Board (ARB)	 eFile & eServe with the Benefits Review Board (BRB)	 eFile & eServe with the Employees' Compensation Appeals Board (ECAB)	 OALJ and BALCA Dashboard <small>(Disabled! Has pending transfer)</small>
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12. The Transfer-From email id and Transfer-To email id receive a transfer initiation email and transfer completion email.



eFile and eServe

Account Transfer Initiated

 EFile Support <eFileSupport@dol.gov>
To: [REDACTED]
Cc: [REDACTED]

Dear John Smith,


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

Thank you,

eFile and eServe

*** DOL TEST SITE ***

Account Transfer Completed

 EFile Support <eFileSupport@dol.gov>
To: [REDACTED]
Cc: [REDACTED]

Dear John Smith,

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

Thank you,

eFile and eServe

*** DOL TEST SITE ***