



Navigate With Confidence

## Transferring Learners Into and Out of Your Organization

### Using LOMA's Learning System

As employees move from one company to another—or from one branch of a company to another—their record of LOMA Learning remains intact. Ed Reps can easily move individuals into and out of their organization groups using LOMA's Learning System.

#### Transfer a learner INTO your organization:

1. Request the learner's **LOMA Test ID** from the learner. (*Learners can view their Test ID by logging in to their existing LOMA Learning account profile.*)
2. Log in to [LOMA's learning system](#)
3. Click Manage > People from the home page [VIEW SCREENSHOT](#)
4. Click Transfer User button [VIEW SCREENSHOT](#)
5. Enter the learner's **Test ID**, then click the search icon (magnifying glass) [VIEW SCREENSHOT](#)
6. Confirm that the correct learner record is displayed.
7. Select the Organization you wish to transfer the learner into, and click Transfer button [VIEW SCREENSHOT](#)
  - o *Once the transfer is complete, the learner's record will appear in any search results or tracking for the newly-assigned organization.*

#### To transfer a learner OUT OF your organization:

1. Log in to [LOMA's learning system](#)
2. Click Manage > People from the home page [VIEW SCREENSHOT](#)
3. Click Transfer User button [VIEW SCREENSHOT](#)
4. Enter the learner's **Test ID**, then click the search icon (magnifying glass) [VIEW SCREENSHOT](#)
  - o *The Ed Rep needs to request the Test ID from the student to complete this activity. The student can view their Test ID in their account profile.*
5. Confirm that the correct learner record is displayed.
6. Select Remove from My Organization button [VIEW SCREENSHOT](#)
7. View success message.
  - o *Once the transfer is complete, the employee's record will no longer appear in search results or tracking for your organization.*

Screen shots are provided on the following pages to help guide you as you navigate LOMA's learning system.

For additional assistance, please reach out to the LOMA Contact Center at [education@loma.org](mailto:education@loma.org).

## Screenshot #1

LOMA Learn Manage Catalog Search Catalog

People

LOMA  
Navigate With Confidence  
www.loma.org

My Designations

Completed: 0 Started: 9

View All

Announcements

LMS Upgrade coming soon!  
Date: 8/16/2022

View All

## Screenshot #2

LOMA Learn Manage Catalog Search Catalog

Transfer User

Search

Search Users

User Search

This Domain Only

> See more search criteria

## Screenshot #3

LOMA Learn Manage Catalog Search Catalog

Manage / People / Transfer User

### Transfer User

Enter a Test ID to search for a student. Select an organization and click Transfer to transfer that student to that organization. Click on Remove From My Organization to remove that student from the current Organization.

Test ID

Test ID	First Name	Middle Initial	Last Name	Login ID
No matching records found				

## Screenshot #4

To transfer a user IN TO your organization:

The screenshot shows the LOMA 'Transfer User' page. At the top, there is a navigation bar with 'Learn', 'Manage', and 'Catalog' menus, a search bar, and user profile icons. Below the navigation, the breadcrumb 'Manage / People / Transfer User' is visible. The main heading is 'Transfer User'. A text box contains the instruction: 'Enter a Test ID to search for a student. Select an organization and click Transfer to transfer that student to that organization. Click on Remove From My Organization to remove that student from the current Organization.' Below this, a search input field contains '020336018E'. A table lists the search results:

Test ID	First Name	Middle Initial	Last Name	Login ID
020336018E	tester082322c		tester082322c	tester082322c

Below the table, the 'Transfer This Learner To:' section has a 'Select Organization' dropdown menu and a 'Transfer' button. A green arrow points to the 'Transfer' button. The dropdown menu is open, showing a search input and two options: 'LOMA Test Org (8888880)' and 'LOMA Test Org (8888881)'. A green arrow points to the first option.

## Screenshot #5

To transfer a user OUT OF your organization:

The screenshot shows the LOMA 'Transfer User' page. At the top, there is a navigation bar with 'Learn', 'Manage', and 'Catalog' menus, a search bar, and user profile icons. Below the navigation, the breadcrumb 'Manage / People / Transfer User' is visible. The main heading is 'Transfer User'. A text box contains the instruction: 'Enter a Test ID to search for a student. Select an organization and click Transfer to transfer that student to that organization. Click on Remove From My Organization to remove that student from the current Organization.' Below this, a search input field contains '020336018E'. A table lists the search results:

Test ID	First Name	Middle Initial	Last Name	Login ID
020336018E	tester082322c		tester082322c	tester082322c

Below the table, the 'Transfer This Learner To:' section has a 'Select Organization' dropdown menu and a 'Transfer' button. A green arrow points to the right. To the right of the 'Transfer' button is a blue button labeled 'Remove From My Organization' with a green arrow pointing to it.