



Delegating and Removing Delegation Task Guide for Enrollers

Overview

This guide provides agents and certified enrollers steps for delegating, de-delegating, and transferring Consumer Cases or Book of Business (BoB).

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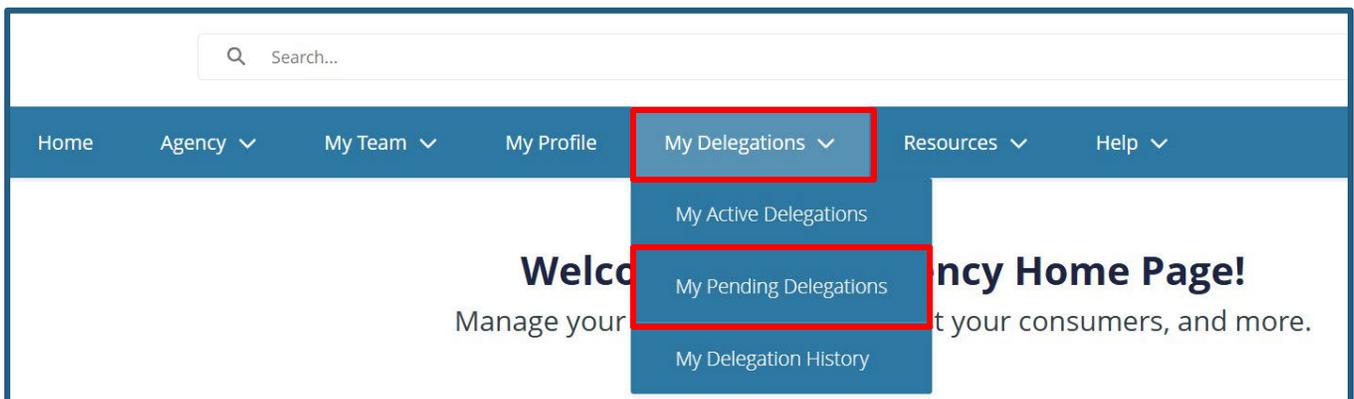
Background

This guide is for Level 1 and Level 2 Agents, Agency Managers, and Approved Admin Staff, and for Certified Enrollment Counselors (CEC), Entity Managers, Plan Based Enroller (PBE), and Medi-Cal Managed Care Plan Enroller (MMCPE).

Accept or Decline a Delegation Request

The Counselor must accept the delegation to access the Consumer's account or application. This section illustrates a Counselor's perspective; however, Agents have similar functionality. The Counselor accepts a delegation request by following these steps:

1. Log into the Enroller Portal and select **My Pending Delegations** from the *My Delegations* dropdown. The *My Pending Delegations* list view displays.





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2. To **accept** a pending delegation request:

- Select the checkbox next to the Consumer's name and click **Accept Delegations**.
- Select the checkbox next to the *Consumer Contact* column label and click **Accept Delegations** to accept all pending delegation requests.

Delegations
My Pending Delegations

1 item • Sorted by CalHEERS Case/Application ID • Filtered by My delegations - Delegation Status • Updated a few seconds ago

<input type="checkbox"/>	CalHEERS Case/...	Name	Date of Birth	SSN	Delegation St...	Request Sent Date	Delegation Name
1	<input type="checkbox"/> 5193166618	Ryu Suji	6/17/1999	8035	Pending	5/30/2024 10:30 AM	D-3433474

3. To **decline** a pending delegation request

- Select the checkbox next to a consumer's name and click **Decline Delegations**.

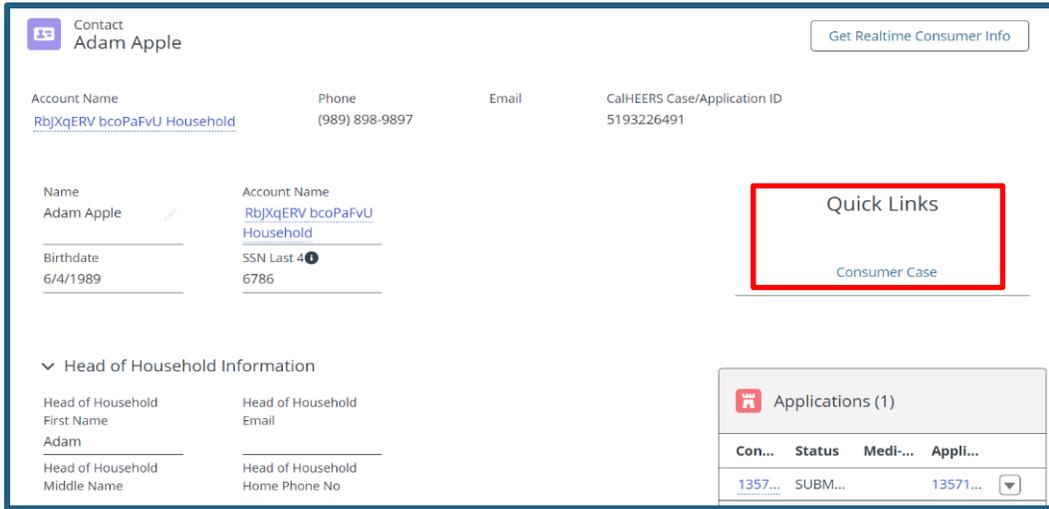
The consumer displays in the counselor's *My Active Delegations* list view on the *Delegations* page when delegation is complete.

Delegations
My Active Delegations

4 Items • Sorted by CalHEERS Case/Application ID • Filtered by My delegations - Delegation Status • Updated a few seconds ago

<input type="checkbox"/>	CalHEERS C...	Name	Date of Birth	SSN	Phone	Email	Household Eligi...	Consent ...	Delegation Start Date	Delegation ...
1	<input type="checkbox"/> 1357050921	Mina Smith	2/25/1986		12135539875		Medi-Cal Only	0	10/15/2024 3:14 PM	D-3433547
2	<input type="checkbox"/> 5193166570	Josie Fred	9/9/1987	8035			Medi-Cal Only	2029	5/15/2024 2:43 PM	D-3433464
3	<input type="checkbox"/> 5193166956	kyla baker	9/12/1990	8030			Medi-Cal Only	2030	7/8/2024 3:35 PM	D-3433508
4	<input type="checkbox"/> 5193167149	true testingtime	9/9/1990	8030			Medi-Cal Only	2030	7/25/2024 3:15 PM	D-3433512

- Clicking the **Consumer Case** link in the Quick Links section navigates the Counselor to the Consumer Home page.

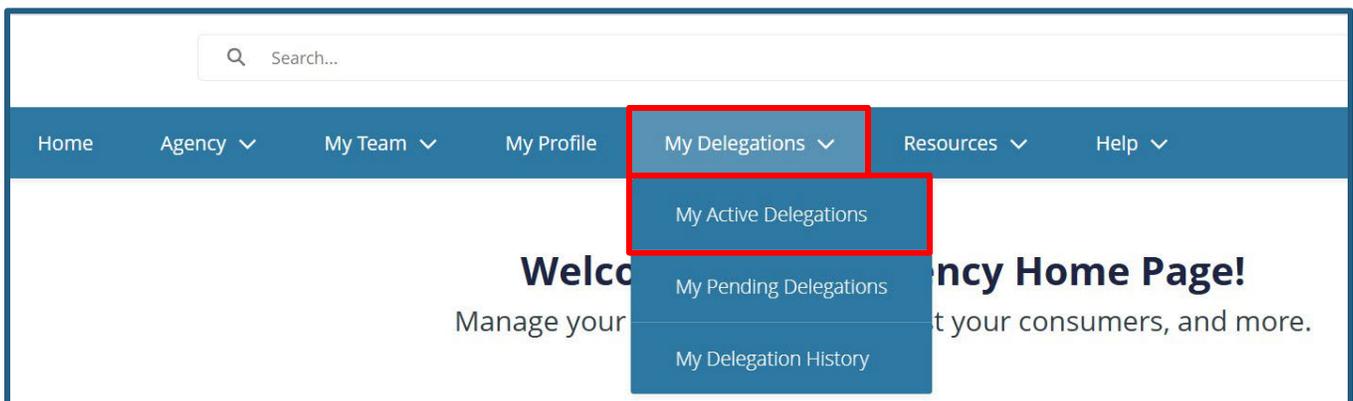


- Clicking a link under the *Delegation Name* column displays the *Delegation* page with the functionality to **Accept Delegation**, **Decline Delegation**, and **Mark as Inactive** buttons.

Removing Delegation

Agents can remove a consumer from their Book of Business (BoB) on the Consumer's *Delegation* page. This section illustrates the steps from the Agent perspective; however, Counselors have similar functionality. To remove a consumer from an Agent's Book of Business:

- Select **My Active Delegations** from the *My Delegations* dropdown. The *My Active Delegations* list view on the *Delegations* page displays.



- Click a link from the *Delegation Name* column. The *Delegation* page displays.



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	Consumer Contact	CalHEERS Case/Applic...	Phone	Email	Household Eligi...	Consent Vali...	Delegation ...	Delegation Name
1	DelegationTCOne Enr...	5193225261			CoveredCA Only	2028	2/27/2023 7:31 AM	D-01288
2	test user	5193227579		c@gmail...	CoveredCA Only	2028	2/21/2023 8:36 PM	D-01911
3	MemOnetzYJJCPC Me...	5193225766			CoveredCA Only	2028	2/7/2023 3:48 AM	D-01400
4	MemOneDCFPHEEF ...	5193225751			CoveredCA Only	2028	2/7/2023 3:00 AM	D-01393
5	MemOneNaOkgijl Me...	5193225736			CoveredCA Only	2028	2/7/2023 2:19 AM	D-01392
6	MemOnesgNrHjzF M...	5193225729			CoveredCA Only	2028	2/7/2023 1:31 AM	D-01390

3. Click **Mark as Inactive**.

Delegation D-01241

Accept Delegation Decline Delegation **Mark as Inactive**

CalHEERS Case/Application ID 1000150723-2022

Consumer Contact 1 Monica Geller

Consumer Household Monica Geller Household

Family Size 6

Delegation Name D-01241

Enroller Contact Karthik AgentLvl2

Agency/Entity Name Multi-Lokiverse Agency

Delegation Status 1 Active

Request Sent Date 2/2/2023 6:20 AM

Delegation Start Date 1 2/2/2023 6:20 AM

- The *Mark as Inactive* popup displays. Click **Save**. The Consumer is removed from the *Active Delegations* list.
 - Clicking the **Cancel** button navigates the Agent back to the *Delegation* page.

Mark as Inactive

Delegation Status 1 Active

Please Read :
This action cannot be undone and you cannot reactivate this delegation unless the consumer provides consent or actively re-delegates access to you. Note: marking an existing delegation as inactive may impact your commission.

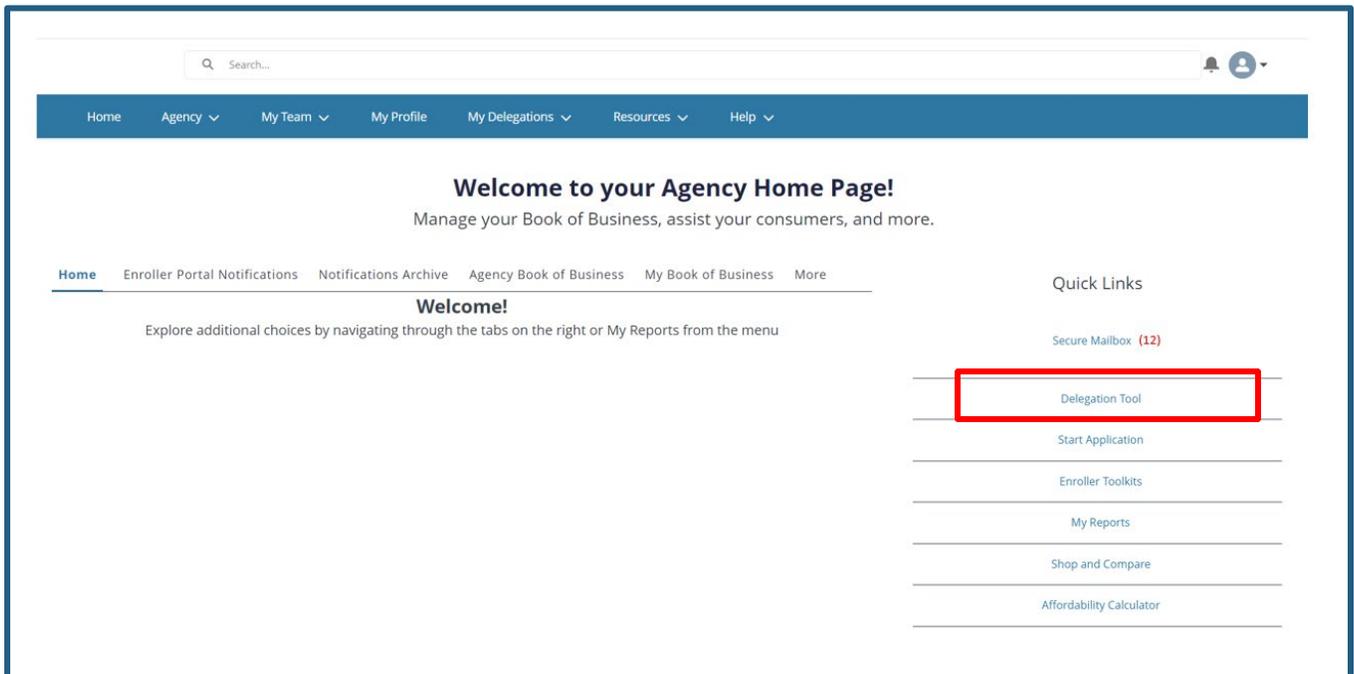
Cancel Save

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Delegation Tool

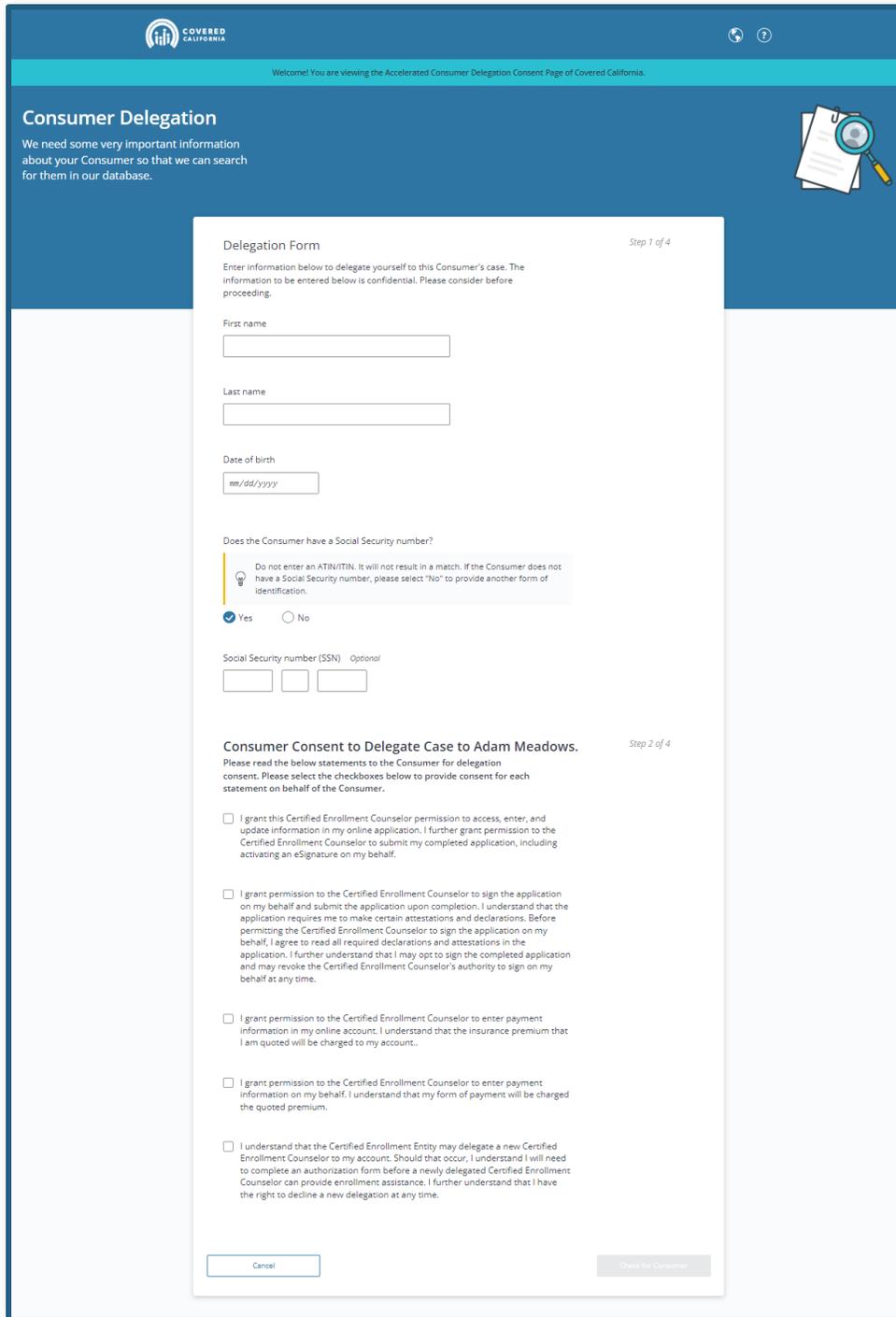
The *Delegation Tool* provides a means for Agents and Counselors to self-serve and delegate a Consumer's case to their BoB. Counselors, Agents, Entity Managers and Agency Managers access the **Delegation Tool** link from the Quick Links section on the Enroller Portal home page. The following steps illustrate the process by which both Agents and Counselors access the *Delegation Tool*.

To begin the delegation process, the Agent must first search for and identify the active Consumer.



1. Click the **Delegation Tool** link from the Quick Links section on the Enroller Portal home page. The *Consumer Delegation* page displays.
2. Enter the following Consumer information on the Delegation Form:
 - First name
 - Last name
 - Date of birth

The *Does the Consumer have a Social Security number?* section is optional and displays with a **Yes** and **No** radio button. The radio button defaults to **Yes** and displays the *Social Security number (SSN)* field.



Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.

Delegation Form Step 1 of 4

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

Do not enter an ATIN/ITIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

Yes No

Social Security number (SSN) *Optional*

Consumer Consent to Delegate Case to Adam Meadows. Step 2 of 4

Please read the below statements to the Consumer for delegation consent. Please select the checkboxes below to provide consent for each statement on behalf of the Consumer.

I grant this Certified Enrollment Counselor permission to access, enter, and update information in my online application. I further grant permission to the Certified Enrollment Counselor to submit my completed application, including activating an eSignature on my behalf.

I grant permission to the Certified Enrollment Counselor to sign the application on my behalf and submit the application upon completion. I understand that the application requires me to make certain attestations and declarations. Before permitting the Certified Enrollment Counselor to sign the application on my behalf, I agree to read all required declarations and attestations in the application. I further understand that I may opt to sign the completed application and may revoke the Certified Enrollment Counselor's authority to sign on my behalf at any time.

I grant permission to the Certified Enrollment Counselor to enter payment information in my online account. I understand that the insurance premium that I am quoted will be charged to my account.

I grant permission to the Certified Enrollment Counselor to enter payment information on my behalf. I understand that my form of payment will be charged the quoted premium.

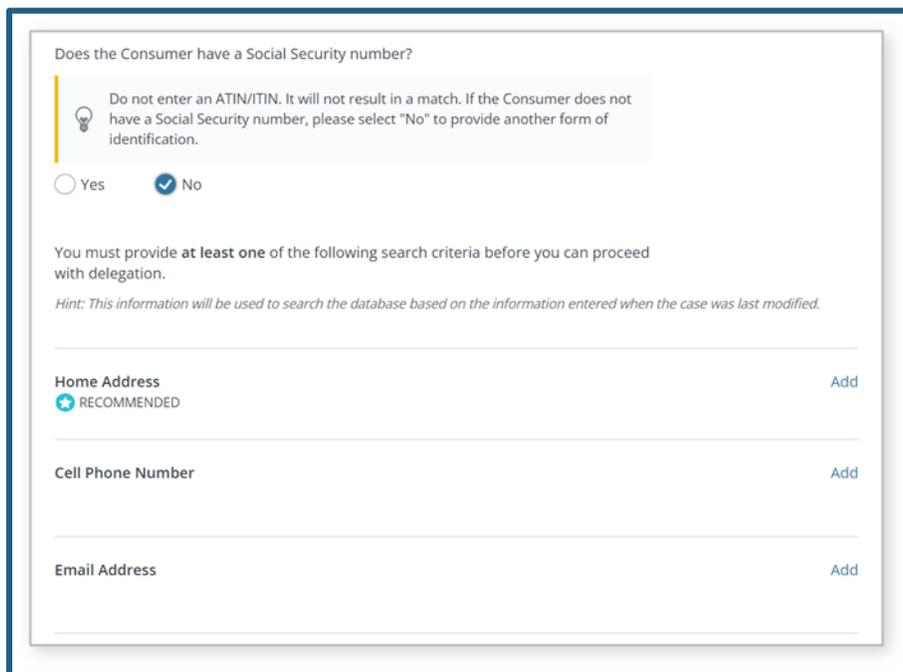
I understand that the Certified Enrollment Entity may delegate a new Certified Enrollment Counselor to my account. Should that occur, I understand I will need to complete an authorization form before a newly delegated Certified Enrollment Counselor can provide enrollment assistance. I further understand that I have the right to decline a new delegation at any time.

3. Enter the SSN.

- An error message displays when the SSN is not a nine-digit number.

- Clicking the **No** radio button in the *Does the Consumer have a Social Security number?* field displays the following and requires at least one search criteria option:
 - **A message:** *You must provide at least one of the following search criteria before you can proceed with delegation displays.*
 - **Search criteria options:** **Home Address**, **Cell Phone Number**, or **Email Address**. An **Add** button displays next to each option.
- Selecting an option dynamically displays a required entry field.
- Clicking the **Remove** button removes the selected search option.

Note: Searching by **Home Address** is recommended.



4. Check the box next to each statement in the *Consumer Consent to Delegate Case to [Agent's name.]* section to indicate that the Consumer consents to the Agent to act on their behalf.
 - An error message displays when a checkbox is unchecked.
 - Clicking all the checkboxes enables the **Check for Consumer** button.

Note: Clicking the **Cancel** button navigates the Agent to the Enroller Portal home page.

Consumer Consent to Delegate Case to Alan Lou.

Please read the below statements to the Consumer for delegation consent. Please select the checkboxes below to provide consent for each statement on behalf of the Consumer.

Step 2 of 4

- I understand that I must provide my personally identifiable information in order to complete the eligibility and enrollment process. I authorize this Agent to access, enter, and update my personally identifiable information into the online application. I further understand that this Agent may access my personally identifiable information in the future if I request any changes to my health coverage.
- I understand that I may end my partnership with this Agent at any time through my Account Dashboard or by calling 1-800-300-1506.
- I grant permission to the Agent to enter payment information in my online account. I understand that the insurance premium that I am quoted will be charged to my account. I further grant permission to the Agent to submit my completed application, including activating an e-signature on my behalf.
- I authorize this Agent to serve as my Agent of Record. If this Agent is affiliated with an Agency, I understand that the Agency may delegate a new Agent to serve as my Agent of Record in the future. I understand that a newly delegated Agent will have access to my personally identifiable information in order to service my account. I further understand that I may end my partnership with a newly delegated Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

Cancel

Check for Consumer

5. Click **Check for Consumer** to initiate a search based on the criteria entered. The system conducts a match based on the information entered. One of the following displays:

- **No Match Found** – No existing match found in the system.

No Match Found

Based on the details you provided, we were unable make a match to our database. If you would like to start a new application, please select the Return to Enroller Dashboard button to begin the process. If you would like to try again, please select the Start Over button to re-enter details. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

Return to Enroller Dashboard

Start Over

- The **Return to Enroller Dashboard** button navigates the Agent to the Enroller Portal home page
- The **Start Over** button navigates the Agent to the *Consumer Delegation* page
- **Multiple Matches Found** – Multiple matches found in the system



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Multiple Matches Found

Based on the details you provided, we were not able to find a single match in our database. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

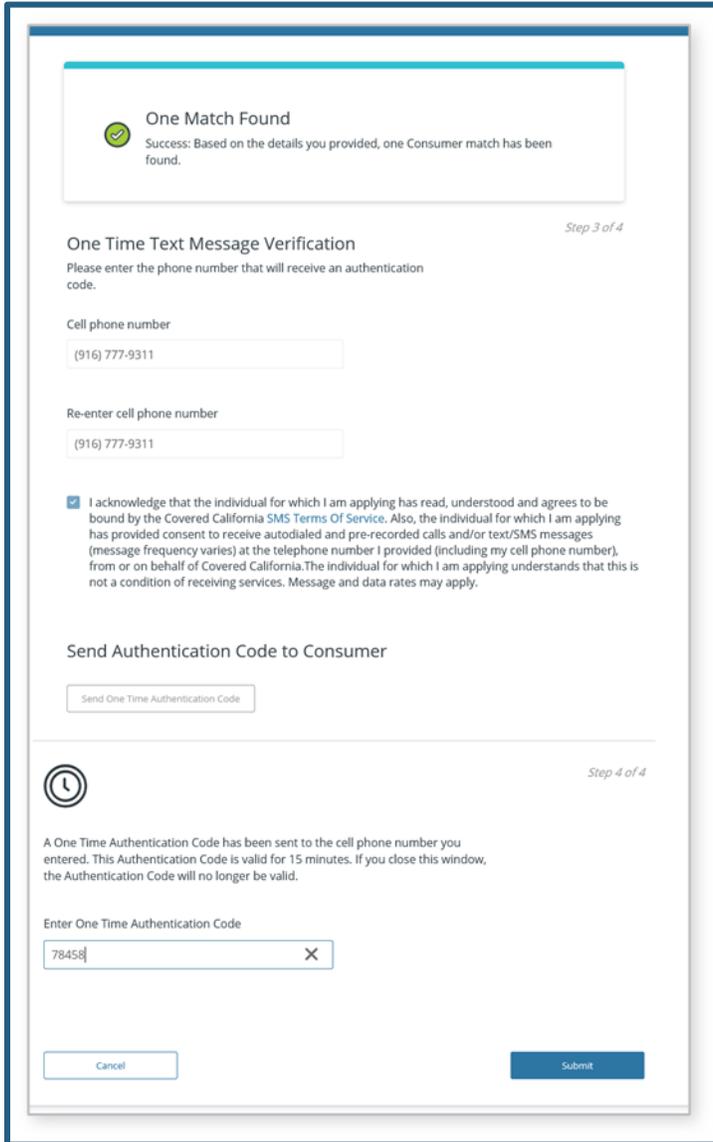
- *Match Already Delegated* – Match found and is currently delegated to the Agent

Match Already Delegated

Based on the details you provided, we found a match in our database that is already delegated to your book of business. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

The next step is to authenticate the consumer. The *One Match Found* page displays when an exact match is found.



One Match Found
Success: Based on the details you provided, one Consumer match has been found.

One Time Text Message Verification *Step 3 of 4*
Please enter the phone number that will receive an authentication code.

Cell phone number
(916) 777-9311

Re-enter cell phone number
(916) 777-9311

I acknowledge that the individual for which I am applying has read, understood and agrees to be bound by the Covered California SMS Terms Of Service. Also, the individual for which I am applying has provided consent to receive autodialed and pre-recorded calls and/or text/SMS messages (message frequency varies) at the telephone number I provided (including my cell phone number), from or on behalf of Covered California. The individual for which I am applying understands that this is not a condition of receiving services. Message and data rates may apply.

Send Authentication Code to Consumer
Send One Time Authentication Code

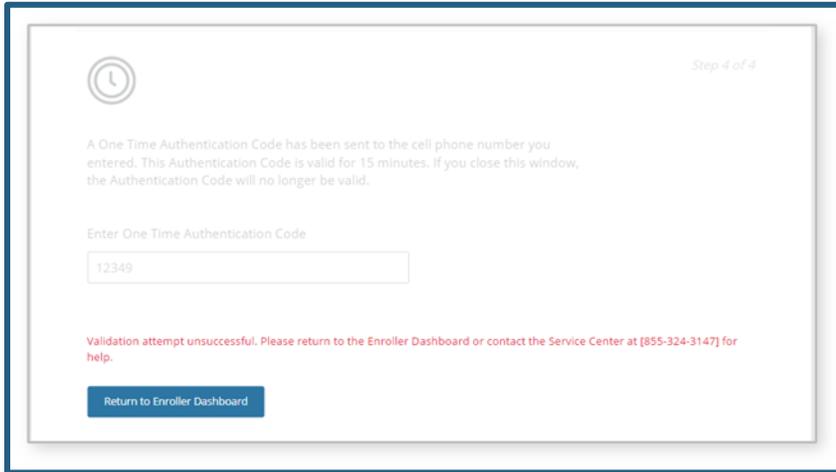
Step 4 of 4
A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you close this window, the Authentication Code will no longer be valid.

Enter One Time Authentication Code
78458 X

Cancel Submit

6. On the *One Match Found* page enter the Consumer's cell phone in the cell phone number fields.
7. Check the **SMS Terms Of Service** checkbox to continue.
8. Click **Send One Time Authentication Code**. A code is sent to the cell phone number entered.
9. Up to three authentication codes can be requested. The user has three attempts to successfully enter each code.

- A total of nine attempts with the incorrect code disables all fields with the exception of the **Return to Enroller Dashboard** button.



Step 4 of 4

A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you close this window, the Authentication Code will no longer be valid.

Enter One Time Authentication Code

12349

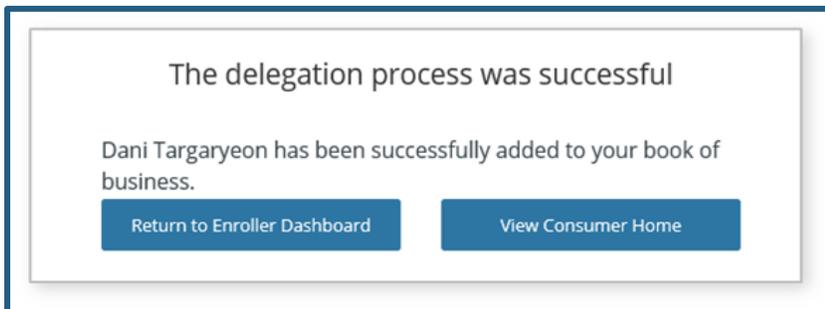
Validation attempt unsuccessful. Please return to the Enroller Dashboard or contact the Service Center at (855-324-3147) for help.

Return to Enroller Dashboard

Note: The authentication code becomes invalid after 15 minutes and when the page is closed. Clicking the **Cancel** button navigates the user to their respective home page.

10. Click the **Submit** button on the *One Match Found* page. One of the following popups displays:

- *The delegation process was successful* – consumer’s case is successfully delegated.



The delegation process was successful

Dani Targaryeon has been successfully added to your book of business.

Return to Enroller Dashboard View Consumer Home

- *The delegation process was unsuccessful* – Due to a system error popup displays.

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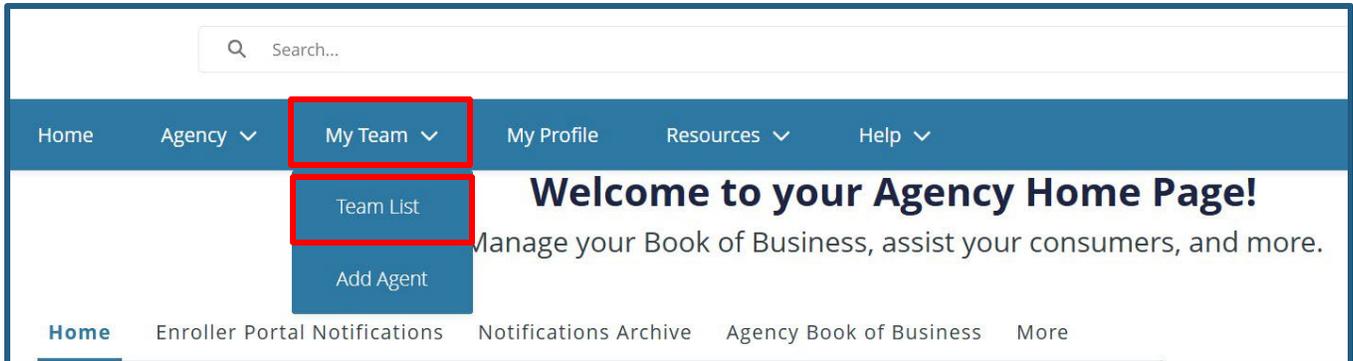


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Approved Agency Admin Staff Level 1 and Level 2

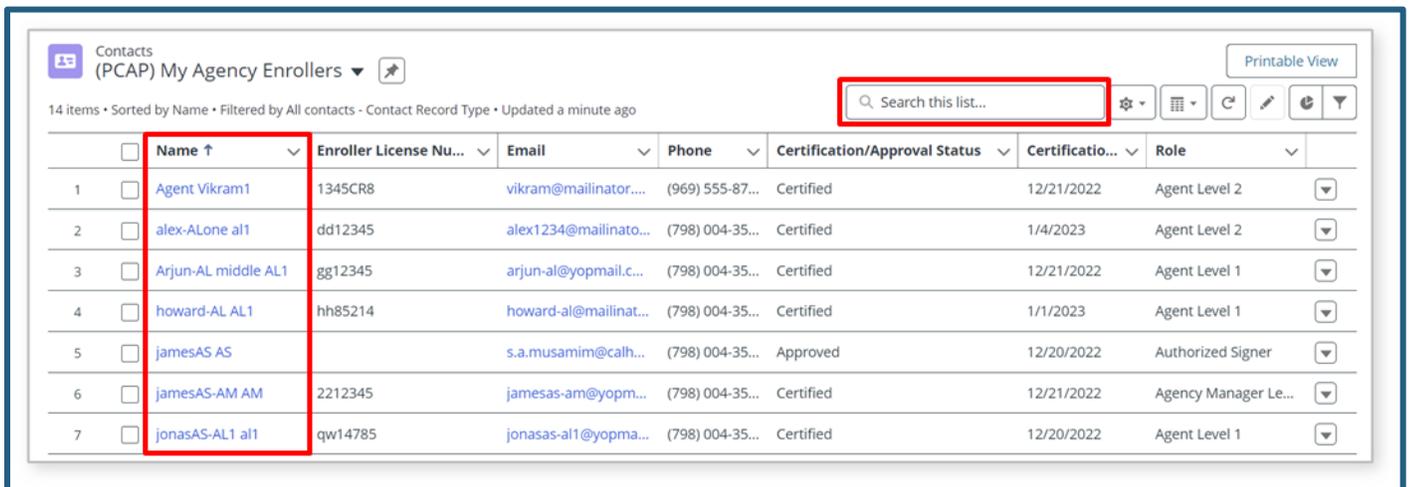
Approved Admin Staff Level 1 and 2 may delegate a Consumer on behalf of an Agent. The Admin Staff first conducts a search for an active Agent and accesses the Agent's Contact page before continuing with the delegation process.

1. Select **Team List** from the *My Team* dropdown menu on the Enroller Portal home page. The *My Agency Enrollers* list view on the *Contacts* page displays.

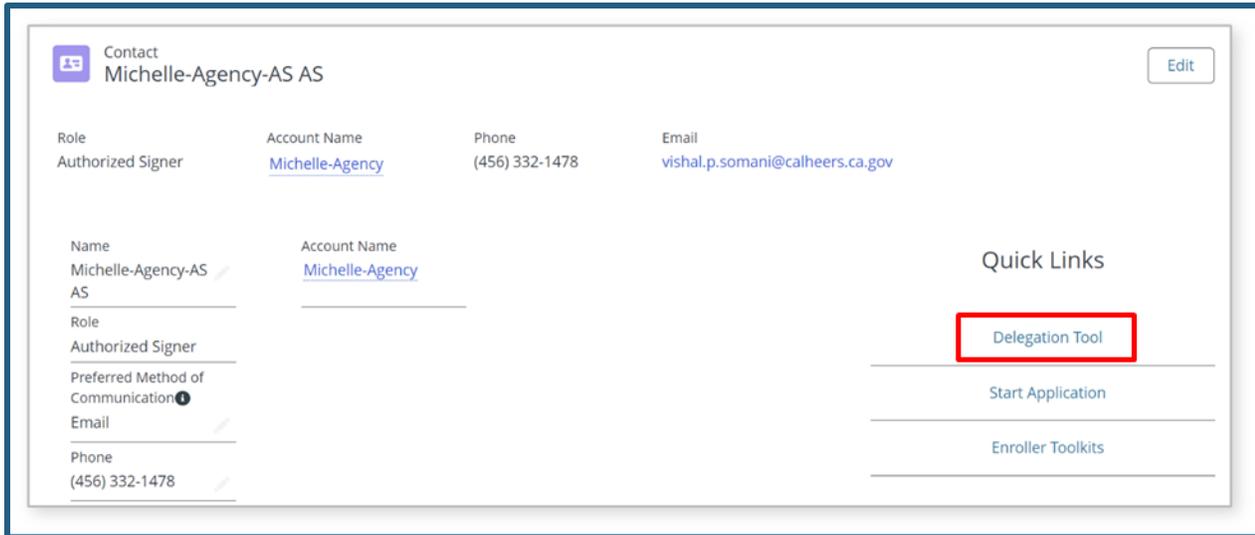


2. Enter one of the following search criteria in the Search this list... field:

- Name
- Enroller License Number
- Email
- Phone
- Certification/Approval Status



3. Select the desired delegate by clicking on the link associated to the Agent from the list of names displaying under the *Name* column. The Agent's *Contact* page displays.



Contact
Michelle-Agency-AS AS Edit

Role	Account Name	Phone	Email
Authorized Signer	Michelle-Agency	(456) 332-1478	vishal.p.somani@calheers.ca.gov

Name	Account Name	Quick Links
Michelle-Agency-AS AS	Michelle-Agency	
Role		
Authorized Signer		

Preferred Method of Communication ⓘ

Email

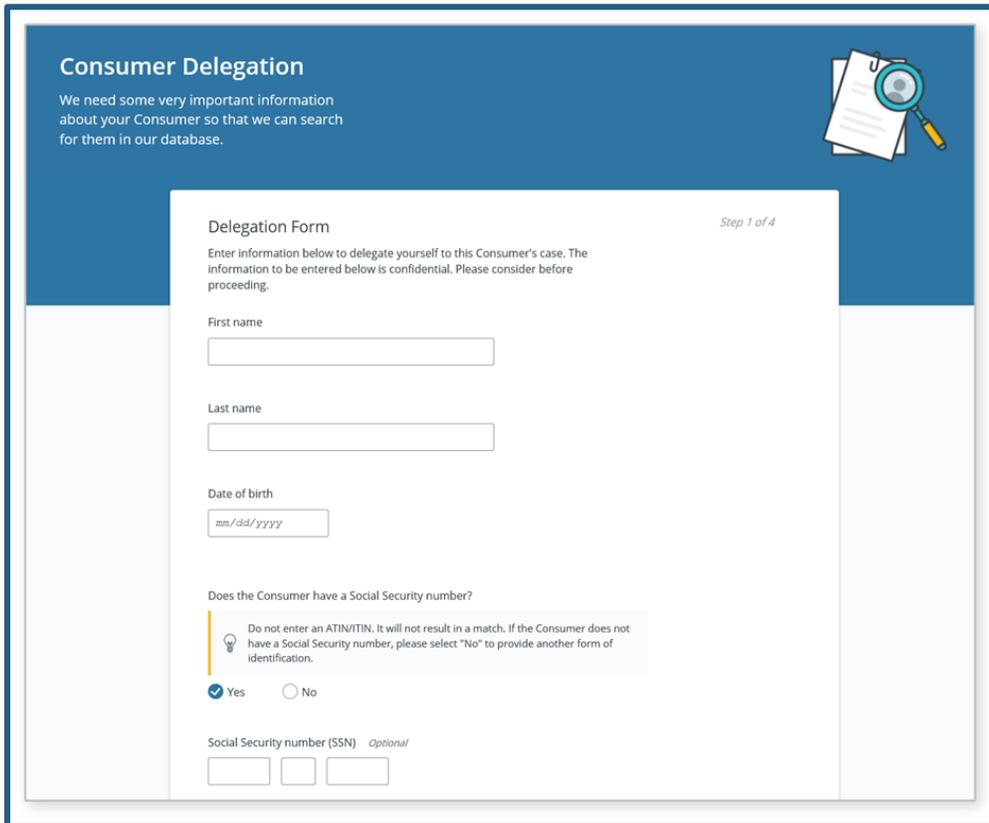
Phone
(456) 332-1478

Delegation Tool

Start Application

Enroller Toolkits

4. Click the **Delegation Tool** link in the Quick Links section. The *Consumer Delegation* page displays.
5. The Admin Staff completes the delegation process similar to all other users.



Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.

Delegation Form Step 1 of 4

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

Do not enter an ATIN/ITIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

Yes No

Social Security number (SSN) *Optional*

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Transfer Consumer Delegations

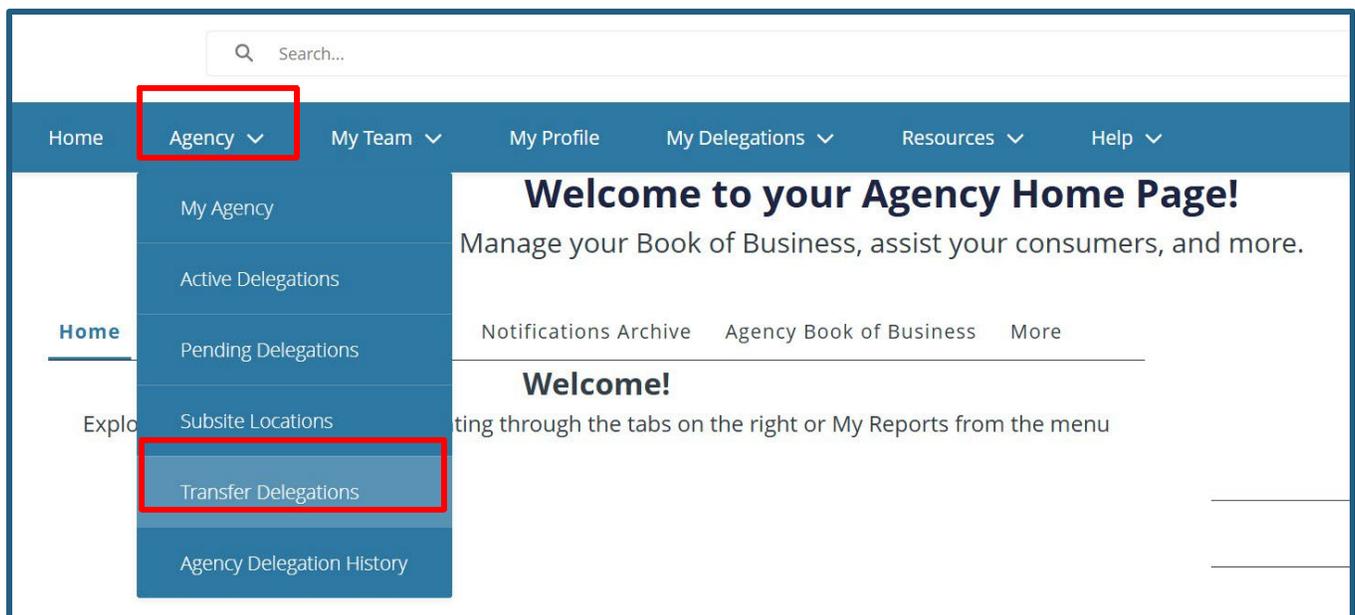
Agency Managers and Entity Managers can transfer a user's entire BoB or specific Consumer cases from one user to another user within their Agency or Entity on the *Transfer Delegations* page.

Additionally, Agency Admins and Entity Admins can transfer an entire BoB from one user to another user across different agencies and entities on the *Transfer Book Of Business* page.

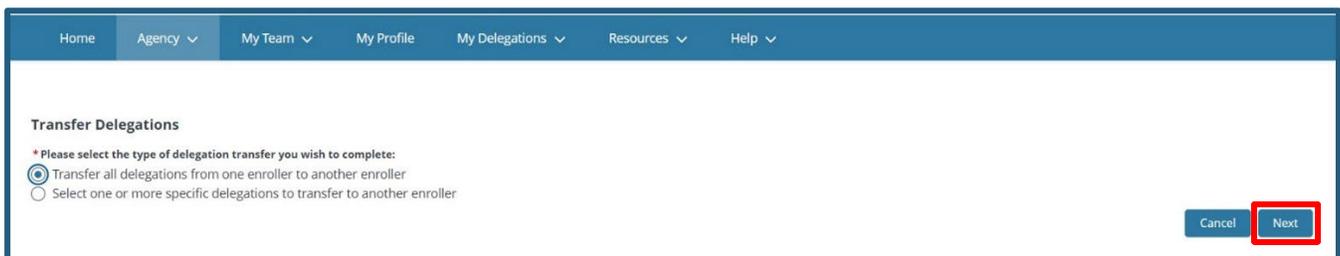
The section is written from the Agency Manager's perspective; however, Entity Managers have the same functionality.

To transfer an Agent's entire BoB:

1. Select **Transfer Delegations** from the *Agency* dropdown on the Enroller Portal home page. The *Transfer Delegations* page displays.



2. Click the radio button for *Transfer all delegations from one enroller to another enroller*. Then click **Next**.



- Clicking the **Cancel** button navigates the user back to the Enroller Portal home page.

3. Search for the Agent whose BoB is being transferred using the **Search** field on the *Select the source enroller for the delegation transfer* page. Agents may use the following parameters to search:
 - Name
 - Email
 - License/Certification Number
 - Role
4. Select the checkbox next to an enroller's name.
5. Click **Next**.
 - An error message displays when more than one enroller is selected
 - Clicking **Cancel** navigates the user to the *Transfer Delegations* page.

Select the source enroller for the delegation transfer

Search ⓘ

	Name	Email	License Number	Certification/Approval Status	Contact Status	Role
<input type="checkbox"/>	Zuchini Dominic aa	zuchini.dominic@mailinato...	6789JAA	Certified	Active	Agency Manager Level 2
<input type="checkbox"/>	Austin AustinAML1	austinaustinam1@mailinat...	JIO0987	Certified	Active	Agency Manager Level 1
<input type="checkbox"/>	dwayne2 bravo One	bravo@mailinator.com	7269879	Certified	Active	Agent Level 1
<input type="checkbox"/>	Tom Holland	parker@mailinator.com	4567788	Certified	Active	Agent Level 2
<input type="checkbox"/>	andy wood	andy@mailinator.com	jjsj928	Certified	Active	Agent Level 2
<input type="checkbox"/>	MARSHAL ONE	marshalone@mailinator.co...	EVE1236	Certified	Active	Agent Level 2
<input type="checkbox"/>	Olivia Olivia	olivia.olivia@mailinator.com	P896569	Certified	Active	Agent Level 1

6. Search for an Agent to receive the BoB transfer using the Search field on the *Select the target enroller for the delegation transfer* page. Agents may use the following search parameters:
 - Name
 - Email
 - License/Certification Number
 - Role
7. Select the checkbox next to an enroller's name.
8. Click **Transfer Delegation(s)**.

Only enrollers in Certified and Active status can receive delegation transfers.

Select the target enroller for the delegation transfer

Search 

<input type="checkbox"/>	Name	Email	License Number	Certification/Approv...	Contact Status	Role
<input type="checkbox"/>	Zuchini Dominic aa	zuchini.dominic@mailinato...	6789JAA	Certified	Active	Agency Manager Level 2
<input type="checkbox"/>	Austin AustinAML1	austinaustinam1@mailinat...	JIO0987	Certified	Active	Agency Manager Level 1
<input type="checkbox"/>	dwayne2 bravo One	bravo@mailinator.com	7269879	Certified	Active	Agent Level 1
<input type="checkbox"/>	andy wood	andy@mailinator.com	jjsj928	Certified	Active	Agent Level 2
<input type="checkbox"/>	MARSHAL ONE	marshalone@mailinator.co...	EVE1236	Certified	Active	Agent Level 2
<input type="checkbox"/>	Olivia Olivia	olivia.olivia@mailinator.com	P896569	Certified	Active	Agent Level 1
<input type="checkbox"/>	Pavan Kumar	pavan.kumar@mailinator.c...	N965698	Certified	Active	Agent Level 1

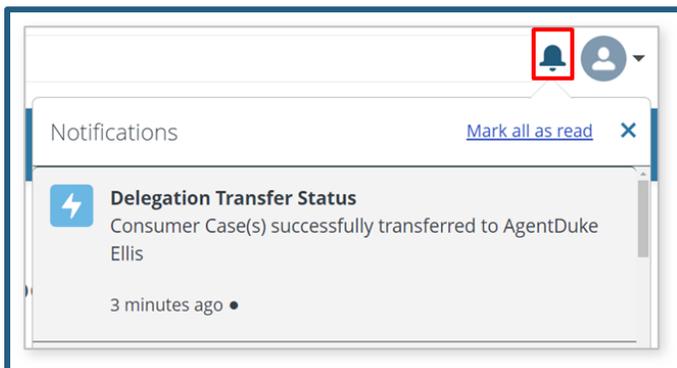
Cancel **Transfer Delegation(s)**

Note: The following error message displays when an enroller does not have these statuses: *Only enrollers in Certified and Active status can receive delegation transfers.*

Transfer is in progress. You will see a notification on the bell icon when the request is complete

[Return to Home Page](#)

A message displays that the transfer is in progress. Clicking the **Return to Home Page** button navigates the user to the Enroller Portal home page.



Notifications [Mark all as read](#) 

 **Delegation Transfer Status**
Consumer Case(s) successfully transferred to AgentDuke Ellis
3 minutes ago •

A *Delegation Transfer Status* popup displays with a successful message.

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Exporting an Agent's Book of Business

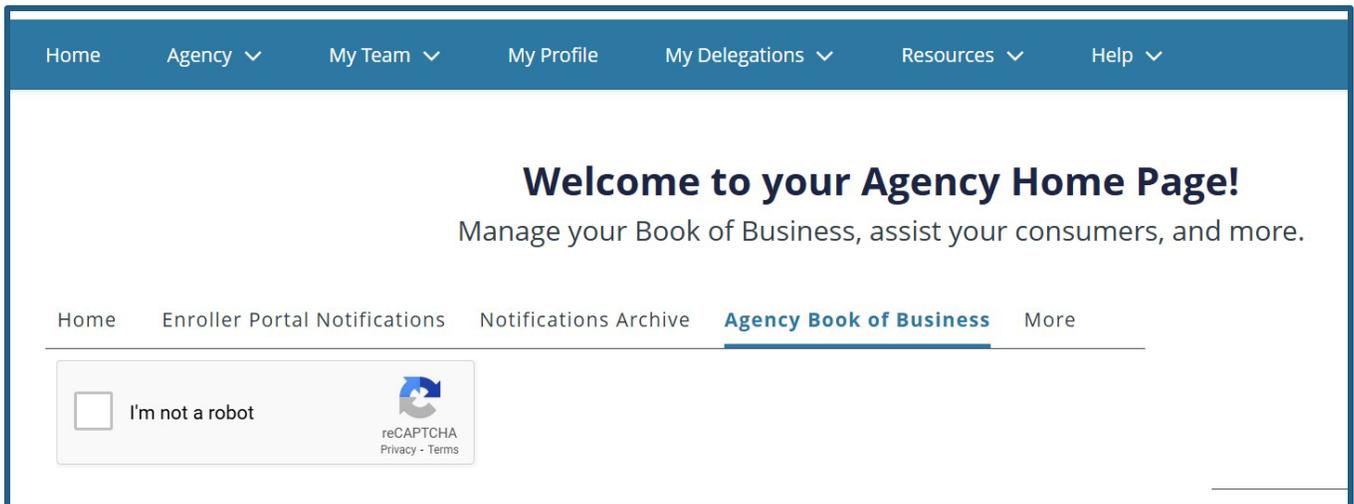
The section is written from the Agency Manager's perspective; however, Entity Managers have the same functionality.

To export an Agent's BoB:

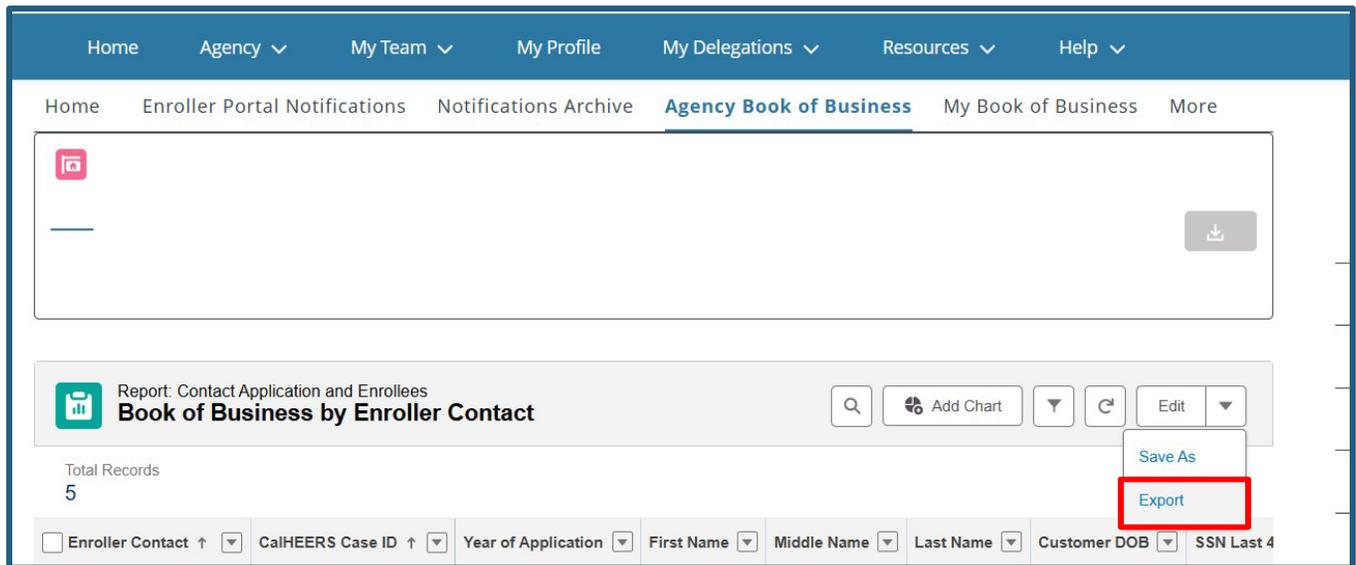
1. From the Enroller Portal home page, select the **Agency Book of Business** tab.



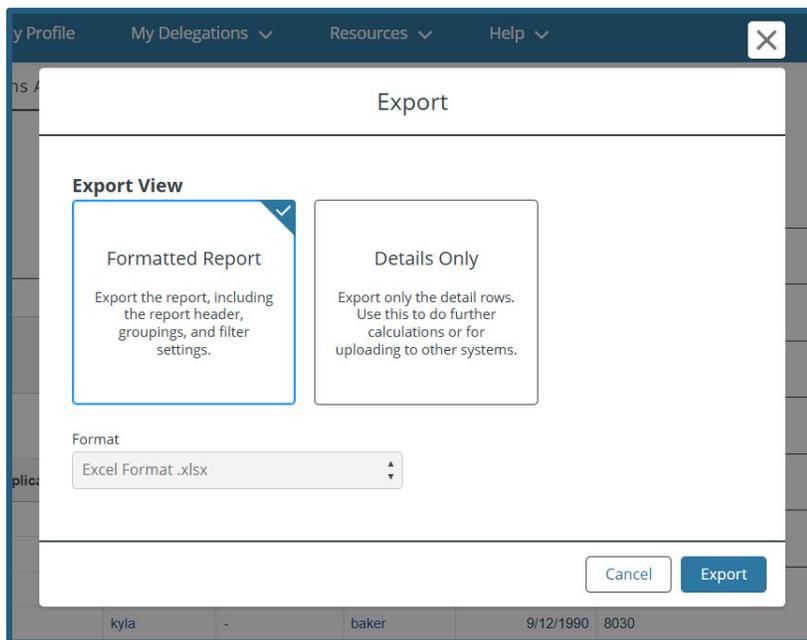
2. To view the Book of Business, reCAPTCHA is required.



3. Once verified through reCAPTCHA, click the **Edit** dropdown and select **Export**.



4. The *Export* popup displays with the following export view options:



- **Formatted Report:** Export the report, including the report header, groupings, and filter settings.
- **Details Only:** Export the details rows. Use this to do further calculations for uploading to other systems.
 - Selecting the **Details Only** tile enables the Format dropdown, and an **Encoding** field displays.

5. Click the **Export** button. The Book of Business by Enroller Contact report downloads to the user's local computer and displays in an Excel file.



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Book of Business by Enroller Contact
As of 2023-03-01 09:46:09 Pacific Standard Time/PST • Generated by Bernardo Silva

Filtered By
Show: All contact applications
Created Date greater or equal 1/6/2023 12:00 AM
Contact: Account Name: Delegation Status equals Active
Case Status equals ACTIVE
Contact: is Individual inactive equals False

Enroller Contact	CalHEERS Case ID	Year of Application	First Name	Middle Name	Last Name	Customer DOB	SSN Last 4	Residence Address Line 1	Residence Address Line 2	Address - City	Address - State
Austin AustinAML1	5193226161	2023	sHViulvB		SdlyXMmW	6/19/1991	7864	2435 Fair Oaks Evergreen Park, Tuolumne, CA 95305		Tuolumne	CA
		2023	rKWPHX		flvOfyCS	6/4/1989	8812	2435 Fair Oaks Evergreen Park, Tuolumne, CA 95305		Tuolumne	CA
Duke Ellis	5193199718	2023	Marcus		Eufy	1/1/1988	8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Isabelle		Eufy	6/20/1998	8043	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty		Eufy	4/1/2012	8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Isabelle		Eufy	6/20/1998	8043	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Marcus		Eufy	1/1/1988	8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty		Eufy	4/1/2012	8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Marcus		Eufy	1/1/1988	8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Amy		Eufy	4/1/1989	8066	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Amy		Eufy	4/1/1989	8066	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty		Eufy	4/1/2012	8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
	5193220968	2023	DueKnLMK		KfPyoCDN	10/10/1984	6871	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	tOHIsqV		OoKwoKAX	10/10/1984	6875	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	tOHIsqV		OoKwoKAX	10/10/1984	6875	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	lXwKQlp		DfYsDRHy	10/10/1984	7741	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	VPafyDOX		KYnVBNw	10/10/1984	7756	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	VPafyDOX		KYnVBNw	10/10/1984	7756	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	steven		Jacobs	10/10/1990	8041	street of main col01 null, almir, CA 95833		almire	CA
		2023	fhqoFWna		veamGdIR	1/12/1973	7743	2435 Fair Lake View, Sacramento, CA 95833		Sacramento	CA
		2023	fhqoFWna		veamGdIR	1/12/1973	7743	2435 Fair Lake View, Sacramento, CA 95833		Sacramento	CA

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Exporting Your Own Book of Business

In addition to exporting a specific Agent’s Book of Business, Agency Managers and Entity Managers can export their own BoB. Agents, and Counselors may also export the BoB using the same steps illustrated above with one minor difference: clicking the My Book of Business tab on the Enroller Portal home page the My Book of Business report displays.

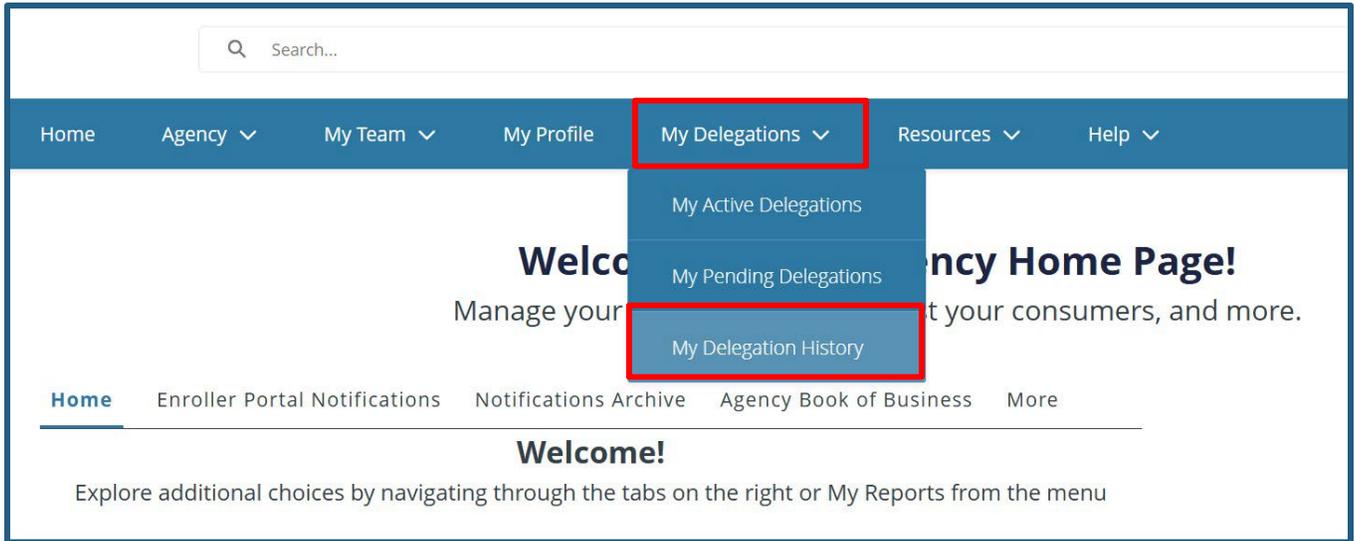
My Delegation History

The *My Delegation History* list view on the *Delegation History* page displays the Agent’s or Counselor’s delegated consumers when the delegation process is successful. This section is intended for Agency Managers; however, Entity Managers, Agents and Counselors have the same functionality.

1. From the *My Delegations* tab dropdown, select **My Delegation History** link



Delegating and Removing Delegation Task Guide for Enrollers



The *My Delegation History* list view on the *Delegation History* page displays with the following Consumer information:

- Consumer Contact
- CalHEERS Case/Application ID
- Delegation Start Date
- Delegation End Date
- Reason for End
- Delegation History Name

2. Click the **Delegation's History Name** link from the *Delegation History Name* column to display the *Delegation History* page

The screenshot shows a table titled 'My Delegation History' with 9 rows of data. The 'Delegation History Name' column is highlighted with a red box. The table includes columns for Consumer Contact, CalHEERS Case/Application ID, Delegation Start Date, Delegation End Date, Reason for End, and Delegation History Name.

	Consumer Contact	CalHEERS Case/Ap...	Delegation Start Date	Delegation End Date	Reason for End	Delegation History Name
1	Marcus Eufy	5193199718	2/15/2023 10:22 AM	2/28/2023 9:17 AM	Transfer within Agency/...	DH-0001994
2	rXKWtPHX fjvOFyCS	5193226161	2/9/2023 1:27 AM	2/17/2023 9:36 PM	Transfer within Agency/...	DH-0001818
3	bob harris	5193224709	2/1/2023 12:26 AM	2/14/2023 10:52 PM	Transfer within Agency/...	DH-0001479
4	Karim Benzema	5193219993	1/18/2023 4:20 AM	1/30/2023 5:07 AM	Consumer requested ca...	DH-0000532
5	tOHIsqqv OoKwokAX	5193221091	1/16/2023 6:27 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000466
6	TxeKQQlp DYscDHxy	5193221094	1/16/2023 7:04 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000467
7	VPafydOX KYnVJBnw	5193221132	1/16/2023 8:11 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000468
8	steven Jacobs	5193221315	1/16/2023 10:15 PM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000469
9	fhqoFWna veamGdiR	5193221484	1/17/2023 3:19 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000470