



Transferring Consumers within an Agency

Overview

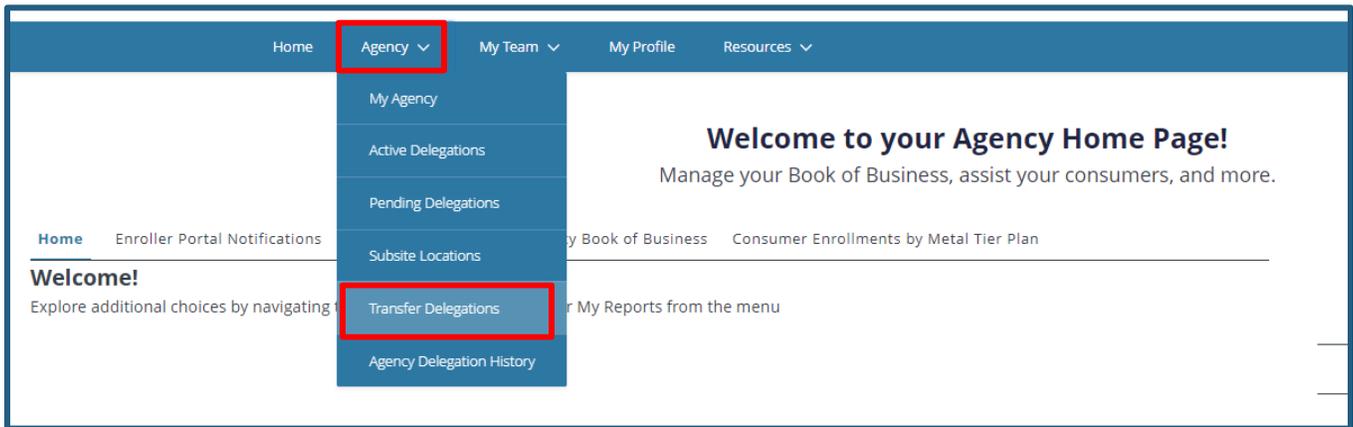
Agency Managers and Approved Admin Staff 2 can transfer consumer delegations between Agents within the Agency without assistance from Covered California. This includes transferring the entire Book of Business between Agents within the same Agency.

The steps below are from the Agency Manager's perspective, but the functionality is the same for Approved Admin Staff 2.

Note: To transfer consumers or an entire Book of Business to an Agent outside of the Agency, contact Agent Contracts at agentcontracts@covered.ca.gov.

Transferring a Single Consumer

1. Login to the Agency Portal.
2. From the *Agency* dropdown menu, select **Transfer Delegations**.



3. Click the radio button for *Select one or more specific delegations to transfer to another enroller*. Then click **Next**.





Transferring Consumers within an Agency

- Your list of consumer delegations populates on the next page. Select one or more delegations to transfer to another enroller, then click **Select Delegations**.

Select one or more specific delegations to transfer to another enroller. Please note, only up to 200 records can be transferred at a time.

Search

0 Items selected

<input type="checkbox"/>	Consumer Contact	Enroller Name	Delegation Start Date	Delegation Status	CalHEERS Case/Application ID	Delegation Name
<input type="checkbox"/>	Ellen Griswold	AM1 Fire		Pending	5193227074	D-3470877
<input type="checkbox"/>	Blanca Bronson	A2 Brooks		Pending	5193232111	D-3470874
<input type="checkbox"/>	Megan Diaz	A1 Sierra		Pending	5193231502	D-3470843
<input type="checkbox"/>	leslie branson	AM1 Fire		Pending	5193231840	D-3470869
<input type="checkbox"/>	Andre Johnson	A1 Sierra		Pending	5193227599	D-3470852

Cancel **Select Delegation(s)**

Note: The search bar can be used to search the following:

- CalHEERS Case/Application ID
- First and/or Last Name of the Consumer Contact

- On the following page, use the Search field for the Enroller to receive the consumer delegate transfer, select the Enroller then click **Transfer Delegation(s)**.

Agents can be found by searching the following:

- Name
- Email
- License/Certification Number
- Role

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/Approval Status	Contact Status	Role
<input type="checkbox"/>	A2 Brooks	a2brooks23@mallinator.com	AD52615	Certified	Active	Agent Level 2
<input type="checkbox"/>	A1 Sierra	a1sierra23@mallinator.com	AD52622	Certified	Active	Agent Level 1

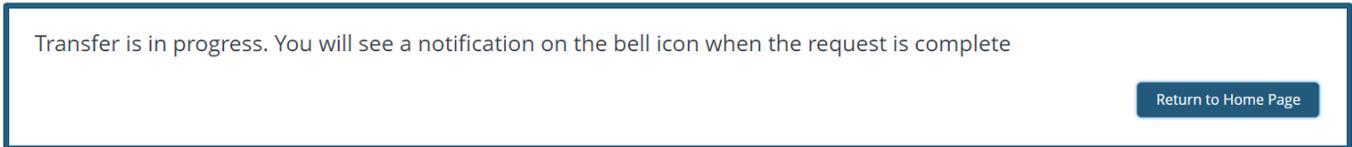
Cancel **Transfer Delegation(s)**



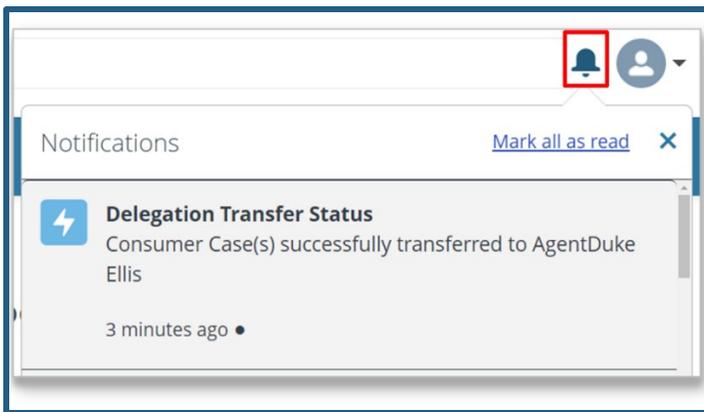
Transferring Consumers within an Agency

Note: Only agents in Certified and Active status can receive delegation transfers. An error message displays when more than one enroller is selected. Clicking the **Cancel** button navigates the user back to the previous page.

6. A message displays that the transfer is in progress.



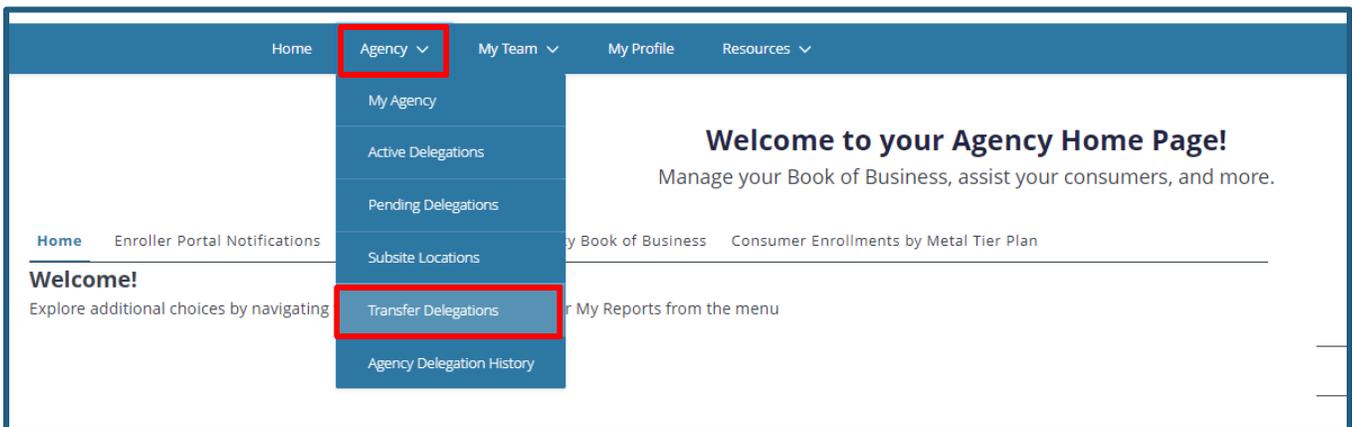
7. A notification on the bell icon appears when the request is completed.



Note: If there was an issue with the transfer after multiple attempts, please contact the Agent Service Center at (877) 453-9198.

Transfer an Entire Book of Business Between Enrollers within an Agency

1. From the *Agency* dropdown menu, select **Transfer Delegations**.





Transferring Consumers within an Agency

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

Home Agency My Team My Profile Resources

Transfer Delegations

*Please select the type of delegation transfer you wish to complete:

Transfer all delegations from one enroller to another enroller

Select one or more specific delegations to transfer to another enroller

Cancel **Next**

- Select the source enroller whose Book of Business you want to transfer and click **Next**.

Select the source enroller for the delegation transfer

Search

Name	Email	License Number	Certification/Approval Status	Contact Status	Role
<input checked="" type="checkbox"/> A2 Brooks	a2brooks23@mailinator.com	AD52615	Certified	Active	Agent Level 2
<input type="checkbox"/> A1 Sierra	a1sierra23@mailinator.com	AD52622	Certified	Active	Agent Level 1
<input type="checkbox"/> AM1 Fire	amifire23@mailinator.com	AD52622	Certified	Active	Agency Manager Level 1

Cancel **Next**

- Select the target enrollers and click **Transfer Delegation(s)**.

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

Select the target enroller for the delegation transfer

Search

Name	Email	License Number	Certification/Approval Status	Contact Status	Role
<input type="checkbox"/> A1 Sierra	a1sierra23@mailinator.com	AD52622	Certified	Active	Agent Level 1
<input type="checkbox"/> AM1 Fire	amifire23@mailinator.com	AD52622	Certified	Active	Agency Manager Level 1

Cancel **Transfer Delegation(s)**

- A message will display that the transfer is in progress, and once the Book of Business transfer is complete, a notification will appear on the bell icon.



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Transfer Delegations for Agencies with 2000+ Delegations

For agencies with a large Book of Business (2,000+ delegations), use the below steps to transfer individual delegations.

- Using the search bar function, type in either of the following:
 - CalHEERS Case/Application ID
 - First and/or Last Name of the Consumer Contact
- Under the *Delegations* section, click the hyperlink of the **Delegation Name**

DELEGATION NAME	ENROLLER CONTACT	CONSUMER CONTACT	DELEGATION STATUS	DELEGATION START DATE
D-3470848	AM2 LaNina	Ellen Griswold	Active	1/11/2024 3:05 PM

- The *Delegation* page appears. On the righthand side, select the down arrow carat and select **Transfer Delegation**.

Delegation D-3470848

Accept Delegation Decline Delegation Mark as Inactive ▼

Transfer Delegation

CalHEERS Case/Application ID ⓘ 5193227687	Enroller Contact AM2 LaNina
Consumer Contact ⓘ Ellen Griswold	Agency/Entity Name Agency ADA
Consumer Household Ellen Griswold Household	Delegation Status ⓘ Active
Family Size 4	Request Sent Date 9/9/2023 5:03 AM
Delegation Name D-3470848	Delegation Start Date ⓘ 1/11/2024 3:05 PM



Transferring Consumers within an Agency

4. Select the target enrollers and **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/Approval Status	Contact Status	Role
<input type="checkbox"/>	A1 Sierra	a1sierra23@mailinator.com	AD52622	Certified	Active	Agent Level 1
<input type="checkbox"/>	AM1 Fire	am1fire23@mailinator.com	AD52622	Certified	Active	Agency Manager Level 1

5. A message displays that the transfer is in progress.

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

6. A notification on the bell icon appears when the request is completed.

