

Overview

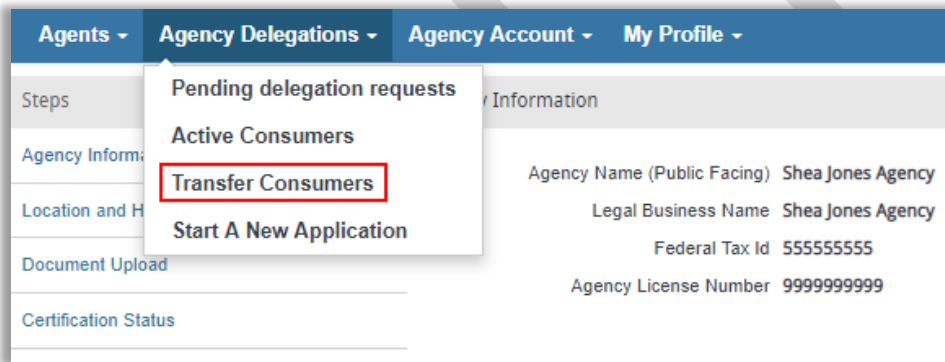
Approved Admin Staff, Level 2, have the ability to transfer consumer delegations between Agents within the Agency without assistance from Covered California. This functionality includes [transferring a single consumer](#), as well as transferring the [entire Book of Business between Agents within the same Agency](#).

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

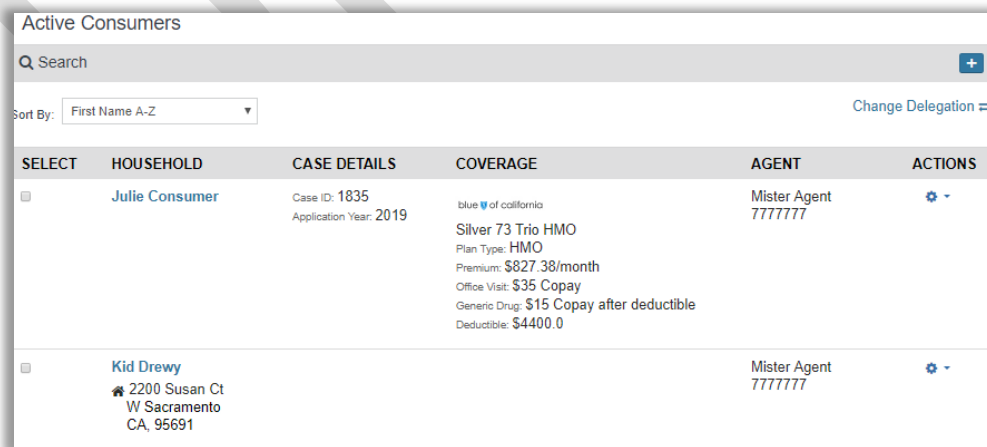
Transferring a Single Consumer


Approved Admin Staff have the ability to transfer a single consumer, multiple consumers, or the entire Book of Business to an Agent within the Agency.

From the “Agency Delegations” drop-down menu, select the “Transfer Consumers” link to navigate to the **Active Consumers** page.




The **Active Consumers** page will display the complete list of consumers delegated to Agents within the Agency.

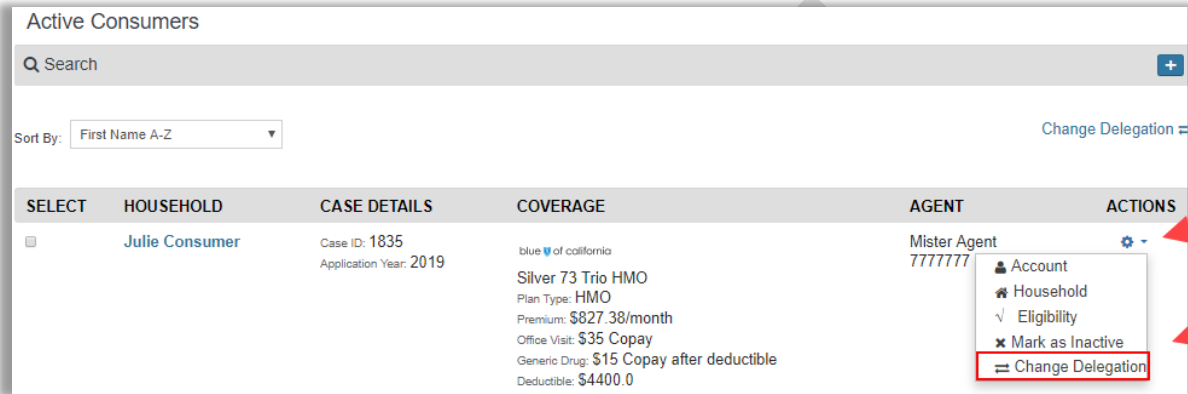


A search for a specific consumer can be done by selecting the  and entering the consumer’s full first and/or last name, or other identifiable information.

The Approved Admin Staff can select one, or multiple consumers listed to transfer to a specific Agent by placing a check mark in the box in the “Select” column.

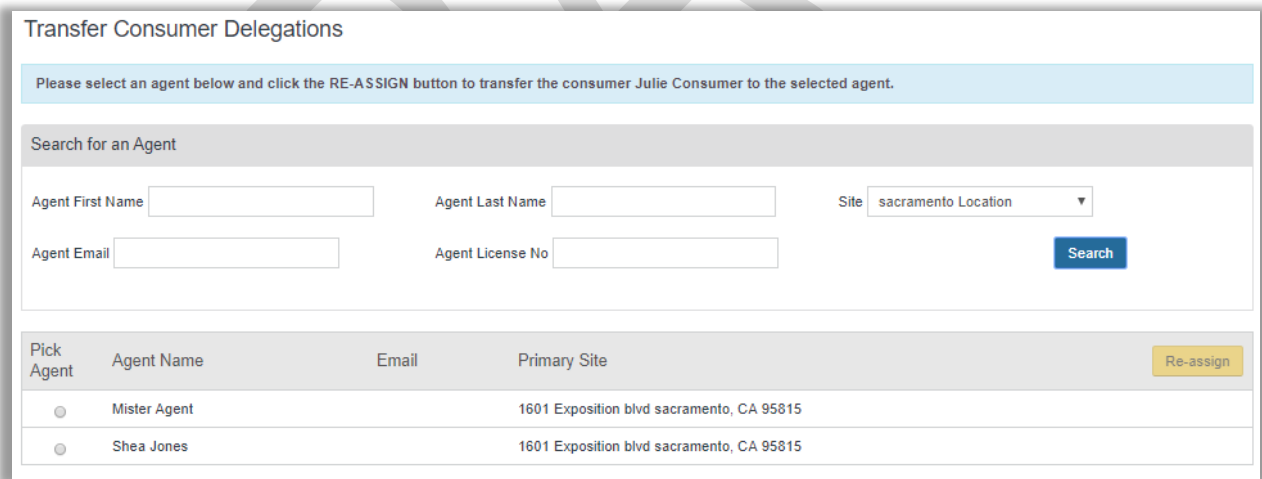
Next, there are two options to transfer delegations:

- The “**Change Delegation**” beneath the Search section of the page or
- In the Actions column next to the consumer you wish to transfer by selecting the  and clicking the “Change Delegation” link



The screenshot shows a table titled "Active Consumers" with columns: SELECT, HOUSEHOLD, CASE DETAILS, COVERAGE, AGENT, and ACTIONS. A row for "Julie Consumer" is selected. The ACTIONS dropdown menu is open, showing options: Account, Household, Eligibility, Mark as Inactive, and Change Delegation (highlighted with a red box). Red arrows point to the gear icon and the Change Delegation option.

The Approved Admin Staff is then navigated to the **Transfer Consumer Delegations** page where they will search for the Agent to transfer the consumer delegation.



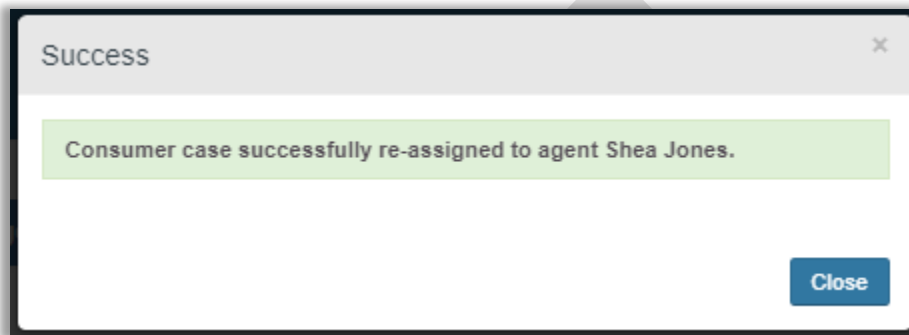
The screenshot shows the "Transfer Consumer Delegations" page. It includes a search form with fields for Agent First Name, Agent Last Name, Agent Email, Agent License No, and Site (sacramento Location). A "Search" button is present. Below the search form is a table with columns: Pick Agent, Agent Name, Email, Primary Site, and a "Re-assign" button.

Pick Agent	Agent Name	Email	Primary Site	Re-assign
<input type="radio"/>	Mister Agent		1601 Exposition blvd sacramento, CA 95815	<input type="button" value="Re-assign"/>
<input type="radio"/>	Shea Jones		1601 Exposition blvd sacramento, CA 95815	

After locating the Agent desired, select the radio button next to their name. Select “Re-assign” to transfer the consumer from one Agent to another.

Pick Agent	Agent Name	Email	Primary Site	Re-assign
<input type="radio"/>	Mister Agent		1601 Exposition blvd sacramento, CA 95815	
<input checked="" type="radio"/>	Shea Jones		1601 Exposition blvd sacramento, CA 95815	

The Approved Admin Staff will then get a confirmation pop-up that the delegation has been transferred and re-assigned from one agent to the other.



This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumer.

Transfer an Entire Book of Business between Agents within the Agency

Approved Admin Staff can also transfer an entire Book of Business from one agent to another agent within the Agency. From the Agency Portal dashboard, locate the Agent with a Book of Business that needs to be transferred.

In the **Actions** column, select the  and click “Transfer Consumer Delegation” link and you will be navigated to the **Transfer Consumer Delegations** page.

Agents - Agency Delegations - Agency Account - My Profile							
Refine Results By	Reset All	Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
First Name	<input type="text"/>	CCU Agent	Active	0	1234567	Certified	
Last Name	<input type="text"/>	CCU Agent	Active	0	1234567	Certified	
Agent Status	<input type="radio"/> Active <input type="radio"/> Inactive	Mister Agent	Active	6	7777777	Certified	
		Shea Jones	Active	1	9999999	Certified	Edit Transfer Consumer Delegations

Search for the Agent you are transferring the Book of Business to by entering any of the following:

- Agent First Name
- Agent Last Name
- Site
- Email Address
- License Number

The results of the search will display Agents within the Agency matching the search criteria entered.

Select the radio button next to the Agent that is accepting the Book of Business transfer and click the “Re-Assign” button to transfer all consumers delegated to one agent, to another agent.

Transfer Consumer Delegations

Please select an agent below and click the RE-ASSIGN button to transfer all consumers for agent Mister Agent to the selected agent.

Search for an Agent

Agent First Name Agent Last Name Site

Agent Email Agent License No

Pick Agent	Agent Name	Email	Primary Site	<input type="button" value="Re-assign"/>
<input type="radio"/>	Mister Agent		1601 Exposition blvd sacramento, CA 95815	
<input checked="" type="radio"/>	Shea Jones		1601 Exposition blvd sacramento, CA 95815	

The Approved Admin Staff will then get a confirmation pop up that the delegations has been transferred and re-assigned from one agent to the other.

Success x

Consumer case successfully re-assigned to agent Shea Jones.

This can be confirmed by looking at the **Active Consumer** page and noting the new Agent delegated to the consumers.