



# Transferring Consumers Within an Agency Job Aid Agency Managers

## Overview

Agency Managers have the ability to transfer consumer delegations between Agents within the Agency without assistance from Covered California. This functionality includes [transferring consumers one by one](#), 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 Businesses to an Agent outside of the Agency, please contact Agent Contracts at [agentcontracts@covered.ca.gov](mailto:agentcontracts@covered.ca.gov) for assistance.

## Transferring a Single Consumer


Agency Managers have the ability to transfer a single consumer or 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 screenshot shows the Covered California Agency Managers interface. At the top, there is a navigation bar with the Covered California logo, language options (Español), and links for Need Help?, Account Home, My Security Profile, Secure Mailbox, and Log Out. Below the navigation bar is a menu with options: Agents, Admin Staff, Agency Delegations, Agency Account, My Delegations, and My Agent Profile. The Agency Delegations menu is open, showing a dropdown with options: Pending Delegation Requests, Active Consumers, and Transfer Consumers. The Transfer Consumers option is highlighted with a red box. Below the menu is a table with columns: Active/Inactive, Consumers, Agent License #, Certification Status, and Actions. The table contains two rows of data. Below the table is a pagination control with Previous, 1, and Next buttons. On the left side of the interface, there is a 'Refine Results By' section with input fields for First Name, Last Name, Agent Status (Active/Inactive), Certification Status (Select Certification Status), and License Number, along with a Go button.


Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Active	0	7777777	Certified	⚙️
Active	1	9999999	Certified	⚙️

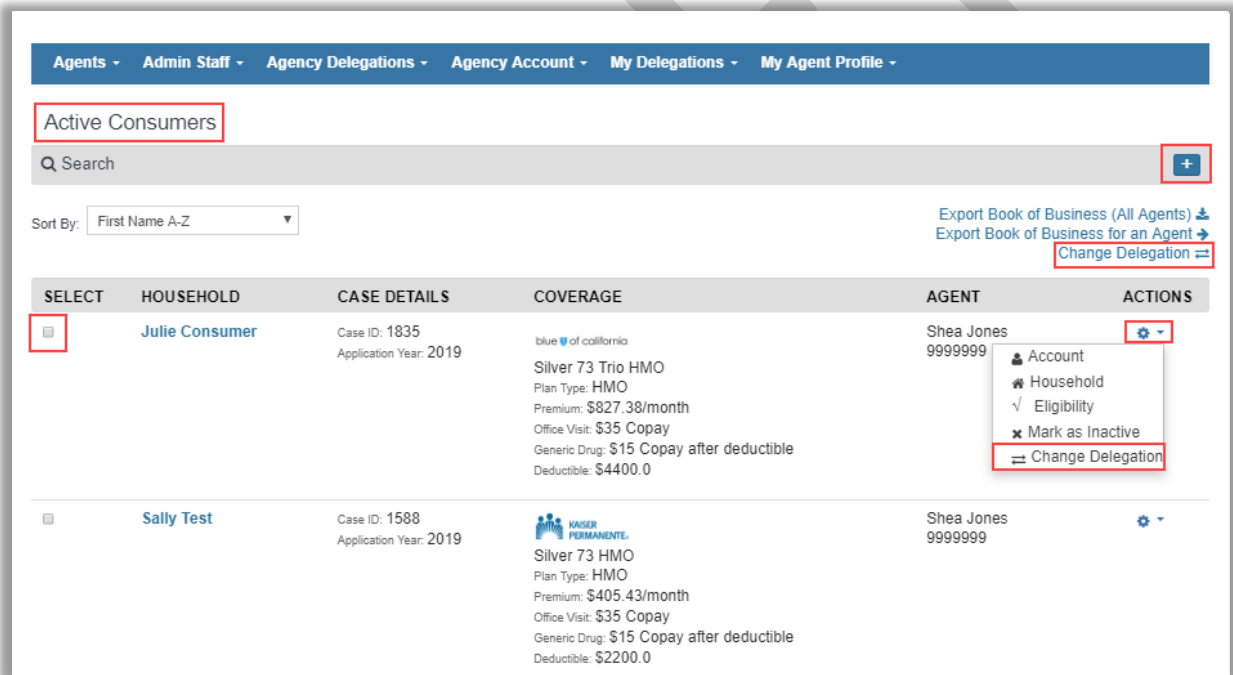
The **Active Consumers** page will display the complete list of consumers delegated to Agents within the Agency.

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 Agency Manager 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.









Agents - Admin Staff - Agency Delegations - Agency Account - My Delegations - My Agent Profile -

**Active Consumers**

Q Search 

Sort By: First Name A-Z

Export Book of Business (All Agents)   
 Export Book of Business for an Agent   
[Change Delegation](#) 

SELECT	HOUSEHOLD	CASE DETAILS	COVERAGE	AGENT	ACTIONS
<input type="checkbox"/>	<b>Julie Consumer</b>	Case ID: 1835 Application Year: 2019	blue of california Silver 73 Trio HMO Plan Type: HMO Premium: \$827.38/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$4400.0	Shea Jones 9999999	 Account Household Eligibility Mark as Inactive <b>Change Delegation</b>
<input type="checkbox"/>	<b>Sally Test</b>	Case ID: 1588 Application Year: 2019	 Silver 73 HMO Plan Type: HMO Premium: \$405.43/month Office Visit: \$35 Copay Generic Drug: \$15 Copay after deductible Deductible: \$2200.0	Shea Jones 9999999	



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

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.

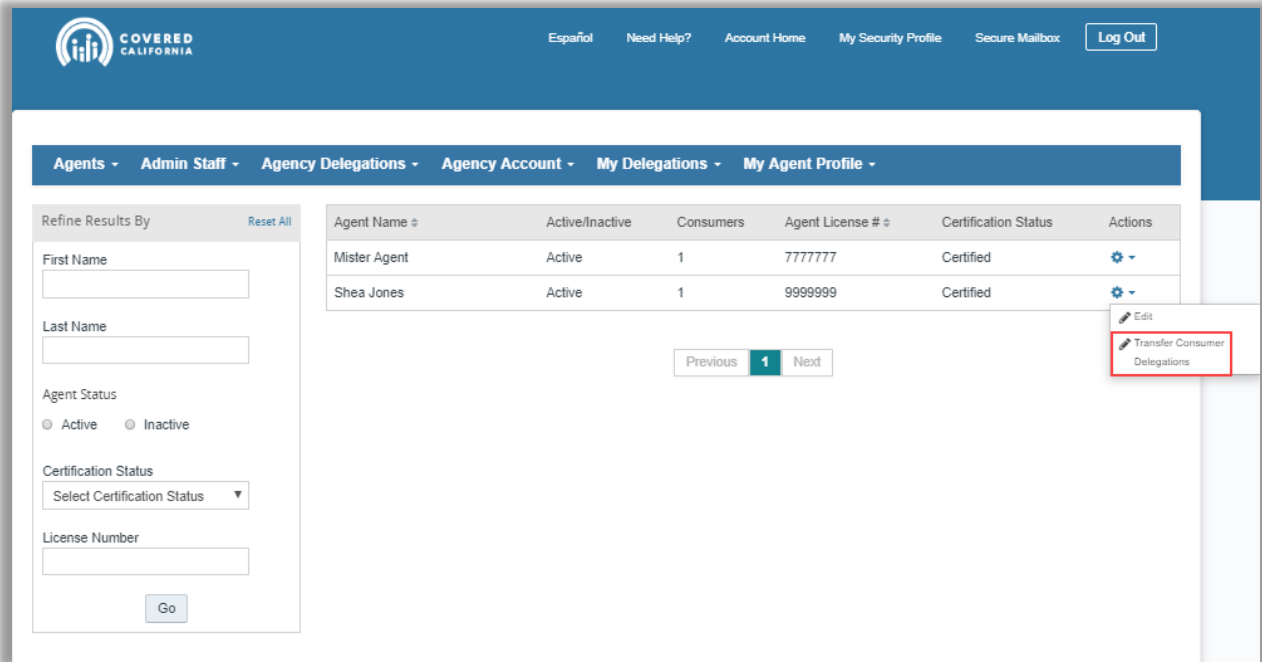
The Agency Manager will then get a confirmation pop up that the delegation has been transferred and re-assigned from one agent to the other.

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

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Agency Managers 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.

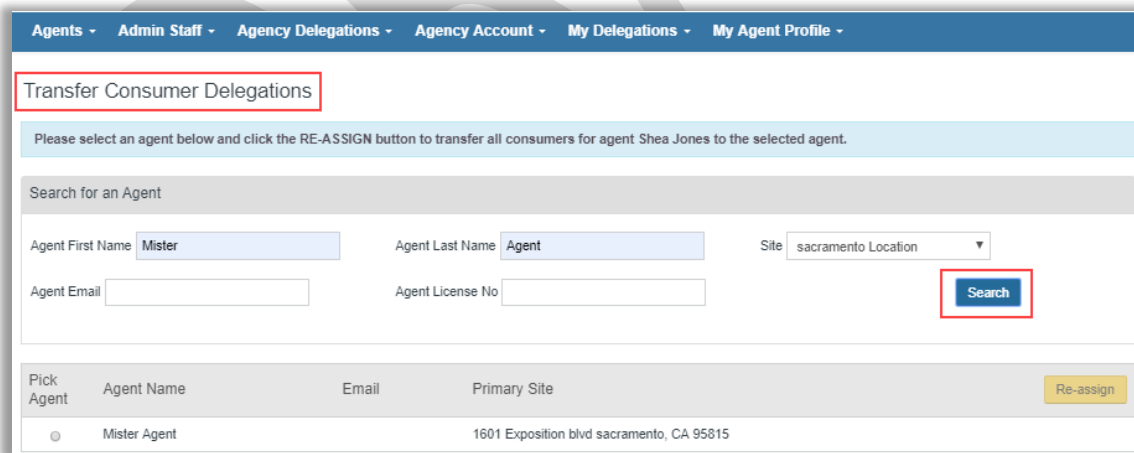


The screenshot shows the Agency Portal dashboard with a navigation menu at the top: **Agents**, **Admin Staff**, **Agency Delegations**, **Agency Account**, **My Delegations**, and **My Agent Profile**. Below the navigation is a search filter section with fields for First Name, Last Name, Agent Status (Active/Inactive), Certification Status, and License Number. The main content area displays a table of agents:


Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Mister Agent	Active	1	7777777	Certified	
Shea Jones	Active	1	9999999	Certified	

In the Actions column for the 'Mister Agent' row, a dropdown menu is open, showing options: **Edit** and **Transfer Consumer Delegations**. The 'Transfer Consumer Delegations' option is highlighted with a red box.

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



The screenshot shows the 'Transfer Consumer Delegations' page. At the top, there is a navigation menu: **Agents**, **Admin Staff**, **Agency Delegations**, **Agency Account**, **My Delegations**, and **My Agent Profile**. Below the navigation is a header section with the title 'Transfer Consumer Delegations' and a message: 'Please select an agent below and click the RE-ASSIGN button to transfer all consumers for agent Shea Jones to the selected agent.' Below the message is a search section titled 'Search for an Agent' with fields for Agent First Name (Mister), Agent Last Name (Agent), Site (sacramento Location), Agent Email, and Agent License No. A blue 'Search' button is highlighted with a red box. Below the search fields is a table with columns: Pick Agent, Agent Name, Email, Primary Site, and Re-assign.

Pick Agent	Agent Name	Email	Primary Site	Re-assign
<input type="radio"/>	Mister Agent		1601 Exposition Blvd Sacramento, CA 95815	

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

- Agent First Name
- Agent Last Name
- Site



# Transferring Consumers Within an Agency Job Aid Agency Managers

- Email Address
- License Number

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

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

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.

Success

Consumer case successfully re-assigned to agent Mister Agent.

[Close](#)

The Agency Manager will then get a confirmation pop up that the delegations 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.

Agent Name	Active/Inactive	Consumers	Agent License #	Certification Status	Actions
Mister Agent	Active	2	7777777	Certified	<a href="#">⚙</a>
Shea Jones	Active	0	9999999	Certified	<a href="#">⚙</a>

Previous **1** Next