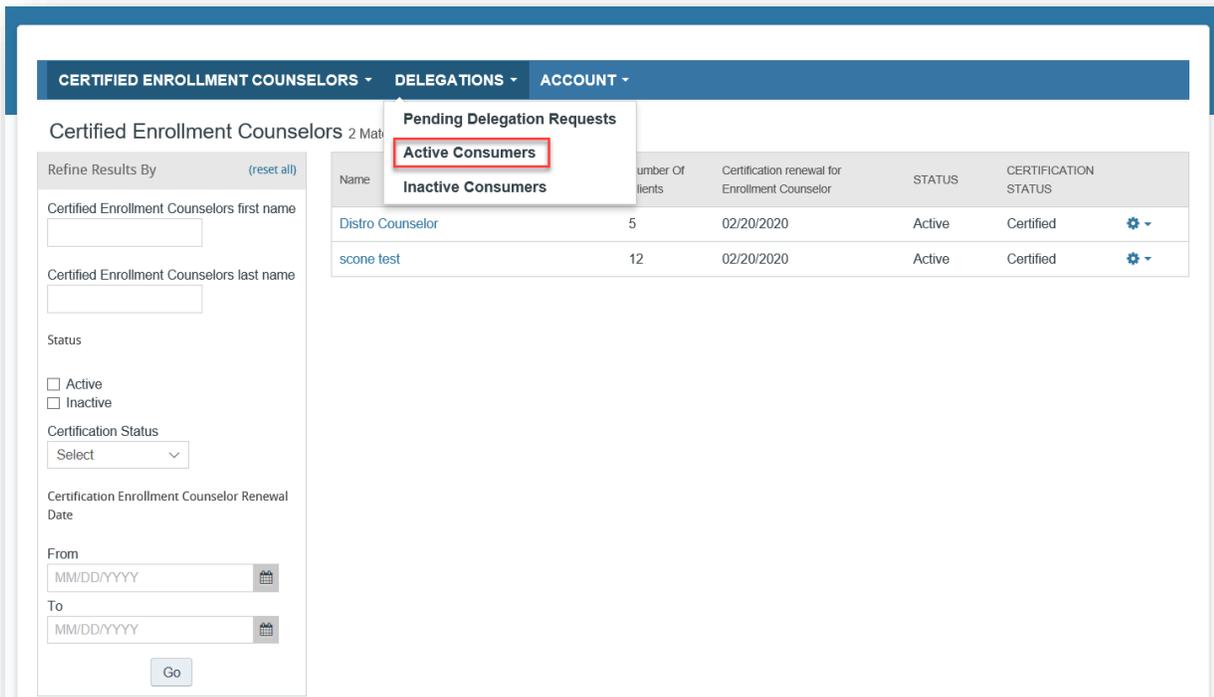**Overview**

Certified Enrollment Entities have the ability to transfer consumer delegations between Counselors within their Entity without assistance from Covered California.

Transferring a Consumer

The Entity Primary Contact can transfer a single consumer or multiple consumers to a Counselor within the Entity.

From the "Delegations" drop-down menu, select the "Active Consumers" link to navigate to the **Active Consumers** page.

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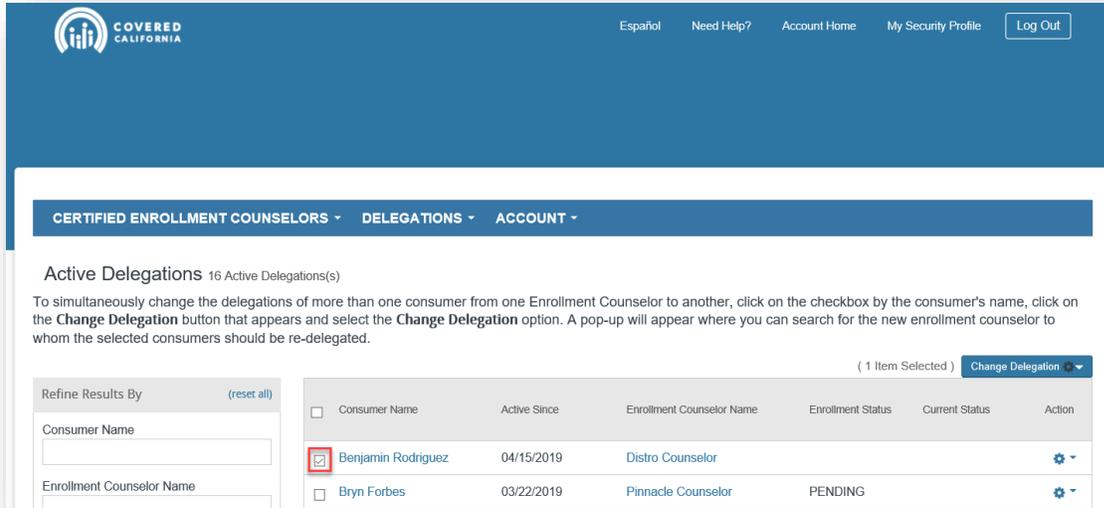

A search for a specific consumer can be done by entering the consumer's full first and/or last name in the "Consumer Name" box of the "Refine Results By" section on the left side of the page.
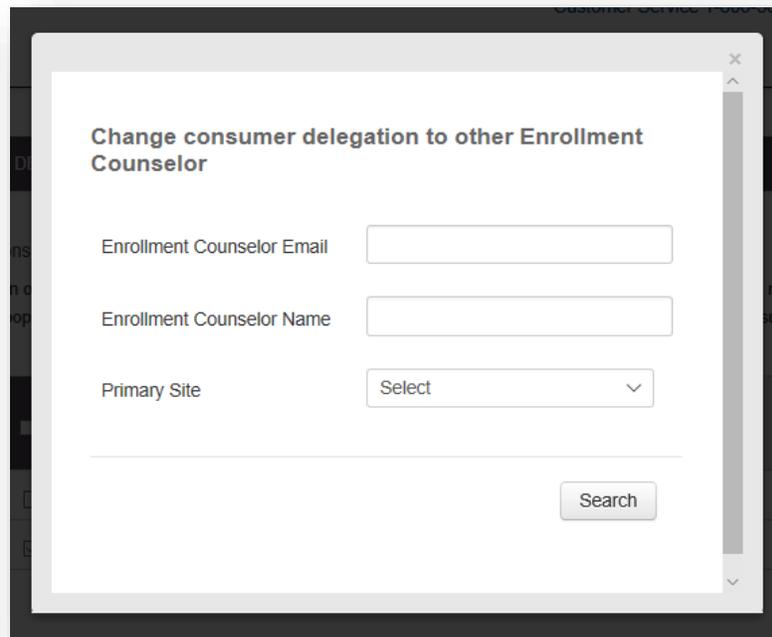
The Entity Manager can select one, or multiple consumers listed to transfer to a specific Counselor by placing a check mark in the box next to the Consumer Name and clicking on [Change Delegation ⚙▼]

The Entity Manager then receives a pop-up to search for the Counselor they wish to transfer the consumer delegation(s) to.
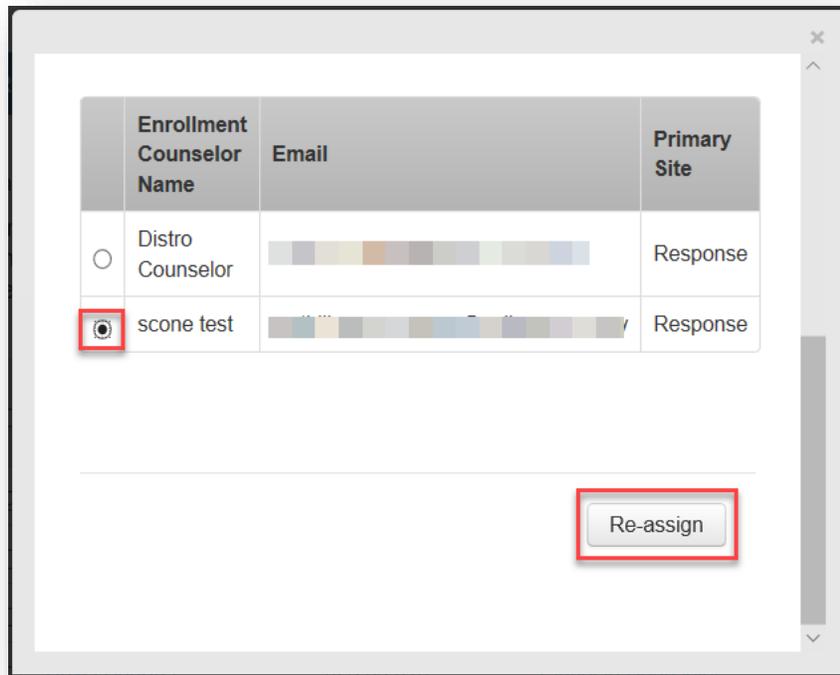
Please Note: The Primary Contact can select the "Search" button without entering any search criteria to receive a list of all counselors within the Entity.
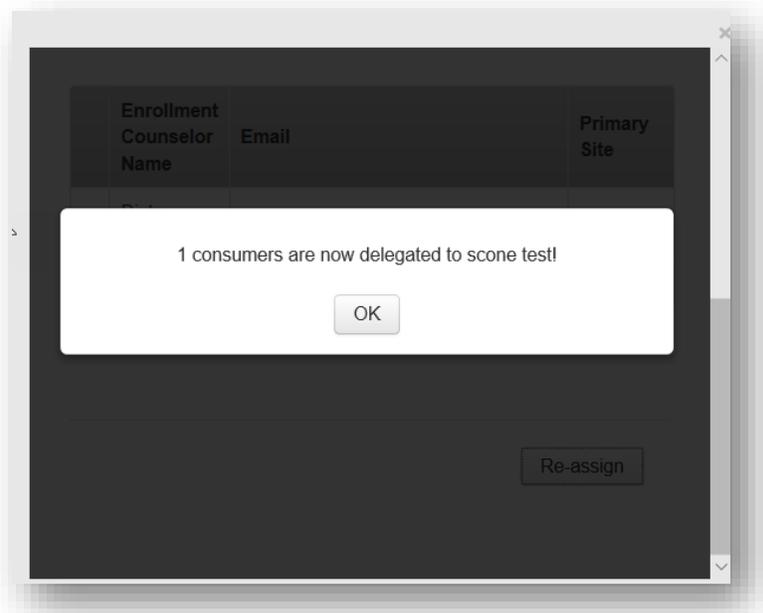
After locating the Counselor, select the radio button next to their name. Select "Re-assign" to transfer the consumer delegation from one Counselor to another.

	Enrollment Counselor Name	Email	Primary Site
○	Distro Counselor		Response
◉	scone test		Response

Re-assign

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

	Enrollment Counselor Name	Email	Primary Site

1 consumers are now delegated to scone test!

OK

Re-assign