

## Overview

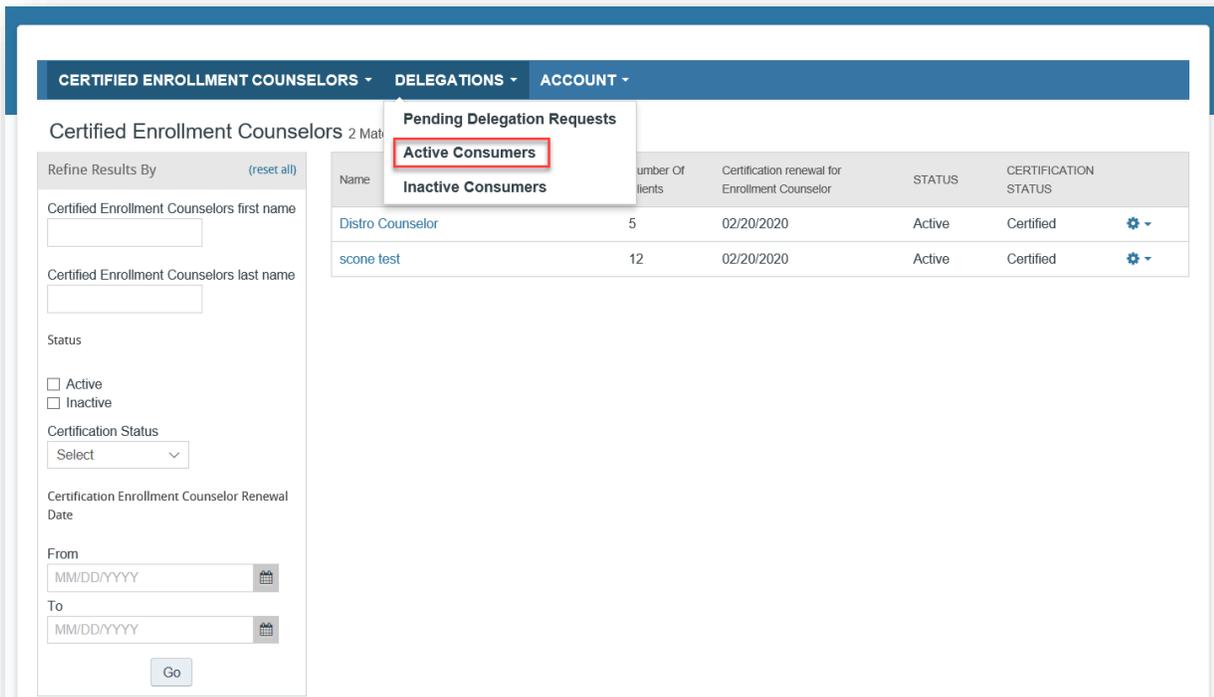
Certified Enrollment Entities have the ability to transfer consumer delegations between Counselors within their Entity without assistance from Covered California.

## 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.



The screenshot shows the 'CERTIFIED ENROLLMENT COUNSELORS' page with the 'DELEGATIONS' menu open. The 'Active Consumers' option is highlighted. The main content area displays a table of counselors:

Name	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
Distro Counselor	5	02/20/2020	Active	Certified
score test	12	02/20/2020	Active	Certified

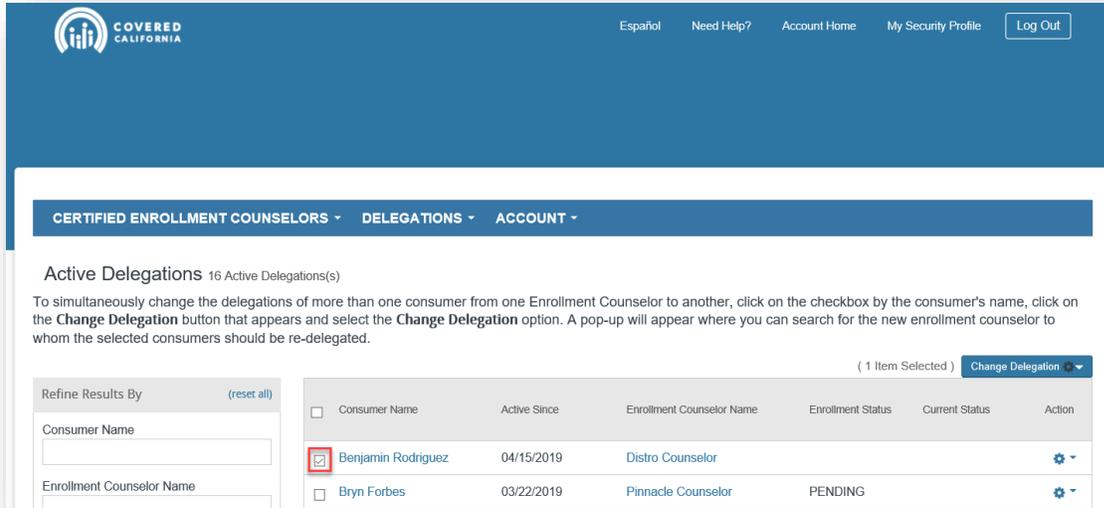
A search for a specific consumer can be done by entering the consumer’s full first and/or last name in the “Consumer Name” box of the “Refine Results By” section on the left side of the page.





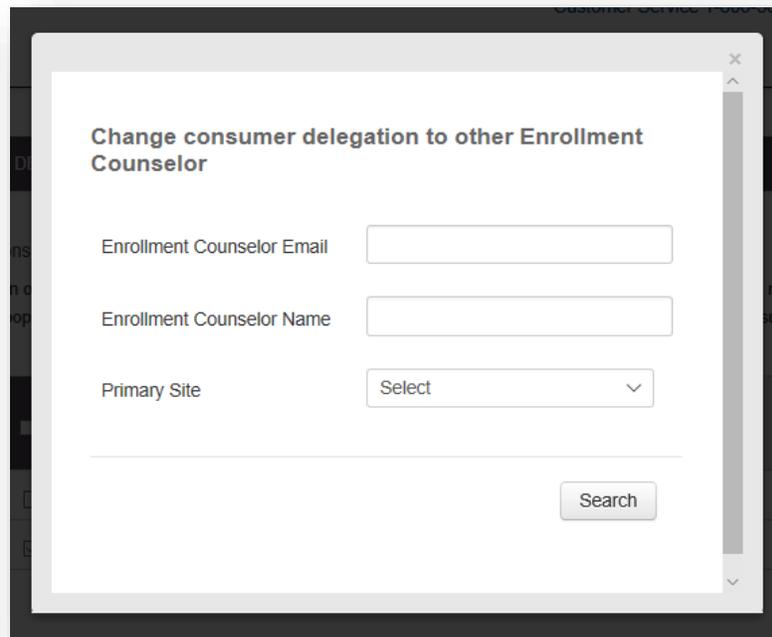
# Transferring Consumers Within an Entity Job Aid Certified Enrollment Entities

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.

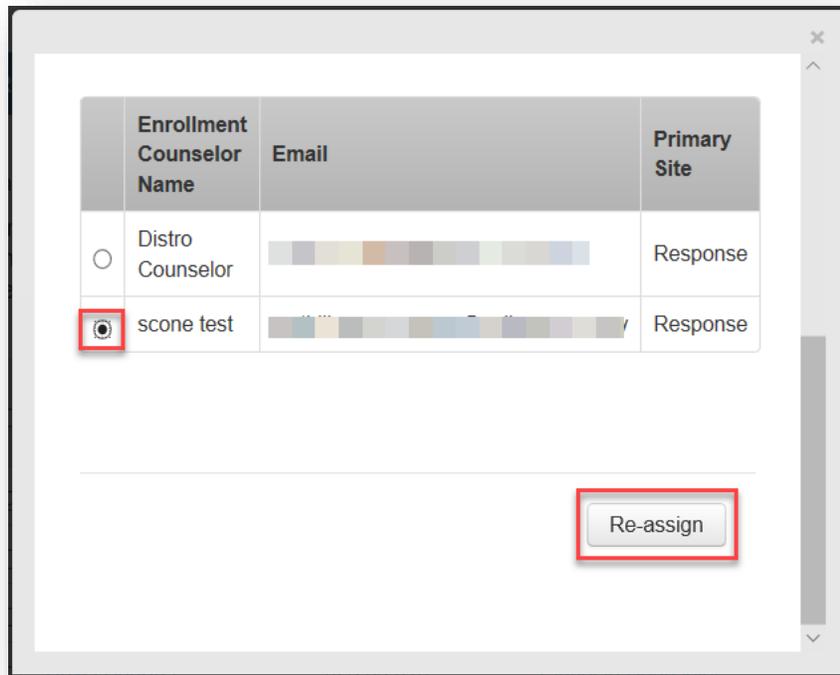
**Please Note:** The Primary Contact can select the “Search” button without entering any search criteria to receive a list of all counselors within the Entity.



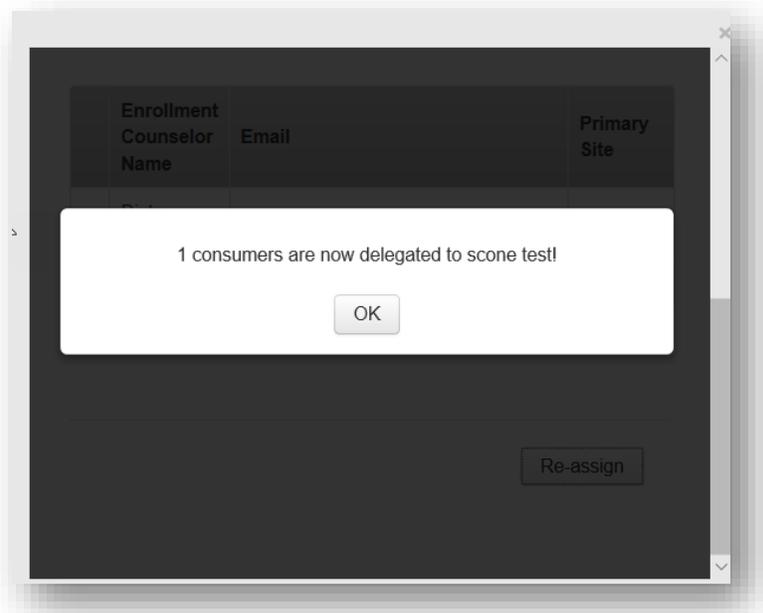


## Transferring Consumers Within an Entity Job Aid Certified Enrollment Entities

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.



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.



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

CERTIFIED ENROLLMENT COUNSELORS ▾
DELEGATIONS ▾
ACCOUNT ▾

### Active Delegations 16 Active Delegations(s)

To simultaneously change the delegations of more than one consumer from one Enrollment Counselor to another, click on the checkbox by the consumer's name, click on the **Change Delegation** button that appears and select the **Change Delegation** option. A pop-up will appear where you can search for the new enrollment counselor to whom the selected consumers should be re-delegated.

( 0 Items Selected )

Consumer Name	Active Since	Enrollment Counselor Name	Enrollment Status	Current Status	Action
<input type="checkbox"/> Benjamin Rodriguez	05/03/2019	Pinnacle Counselor			⚙️ ▾
<input type="checkbox"/> Bryn Forbes	03/22/2019	Pinnacle Counselor	PENDING		⚙️ ▾
<input type="checkbox"/> Chip Test	04/15/2019	Distro Counselor			⚙️ ▾
<input type="checkbox"/> Davis Bertans	02/26/2019	Pinnacle Counselor			⚙️ ▾
<input type="checkbox"/> Derrick White	02/26/2019	Pinnacle Counselor	ENROLLED		⚙️ ▾
<input type="checkbox"/> Gregg Popovich	02/26/2019	Pinnacle Counselor			⚙️ ▾
<input type="checkbox"/> Hamilton Porter	03/06/2019	Pinnacle Counselor	PENDING		⚙️ ▾
<input type="checkbox"/> Household Member	04/23/2019	Pinnacle Counselor		Application In Progress	⚙️ ▾
<input type="checkbox"/> Jesse Hall	03/06/2019	Pinnacle Counselor			⚙️ ▾
<input type="checkbox"/> Lebron James	02/26/2019	Pinnacle Counselor			⚙️ ▾

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Enrollment Status

Current Status

Active Since