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Agent to Agent Transfer Fact Sheet

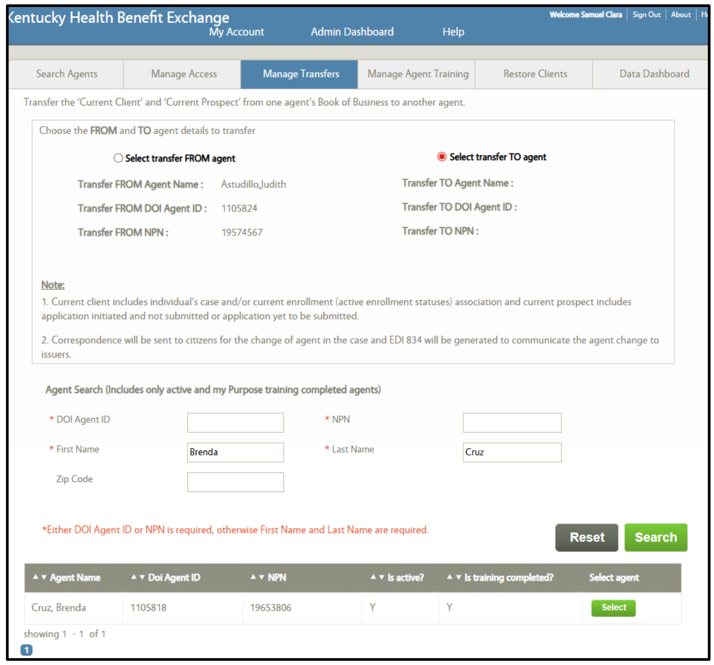
Using the **Manage Transfers** screen found on the **Admin Dashboard**, Agent Portal users with the Admin role can transfer all current clients and all current prospects from one Agent's Book of Business to another Agent. They can also transfer a specific client (or clients) from one Agent to another Agent.

Transfer All Clients and Prospects (Bulk Transfer)

The initial step in transferring all current clients and current prospects from one Agent to another is to search for and select the transfer **FROM Agent** and the transfer **TO Agent**.

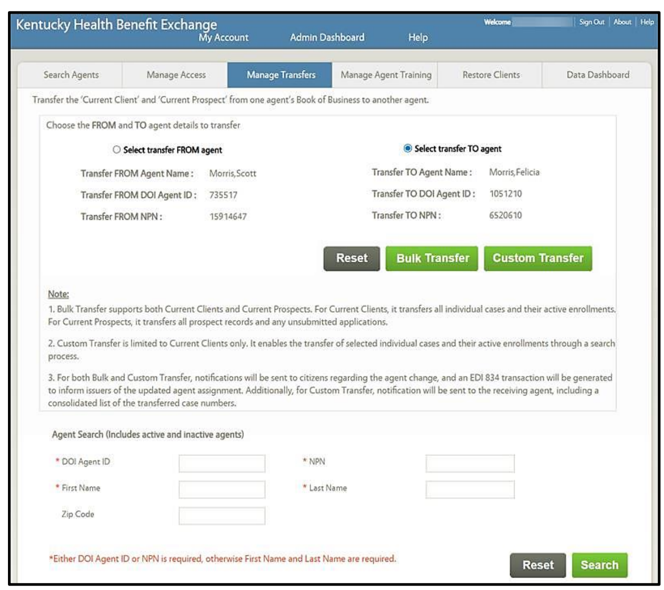
To search for the **FROM Agent**, click the **Select transfer FROM agent** radio button, enter the **search criteria**, and click **Search**. After the *Search Results* section populates, click the **Select** button next to the applicable Agent and then click **OK** in the pop-up that displays asking if the correct Agent was selected. The **FROM Agent** information then displays.

Next, click the **Select transfer TO agent** radio button, enter the search criteria, and click **Search**. After the *Search Results* section populates, click the **Select** button next to the applicable Agent and then click **OK** in the pop-up that displays asking if the correct agent was selected. The **TO Agent** information displays.



Please Note: When searching for Agents, either the DOI Agent ID or NPN is required, otherwise, First Name and Last Name are required.

Lastly, click **Bulk Transfer**. A **Transfer Alert** pop-up displays the following message: : "*Are you sure you made the correct selections to transfer the agent's Book of Business? If yes, please continue transfer, otherwise please close this alert and verify*." To finalize the transfer, click **Bulk Transfer** in the pop-up. All current clients and current prospects are transferred from the **FROM Agent's** book of business to the **TO Agent**.



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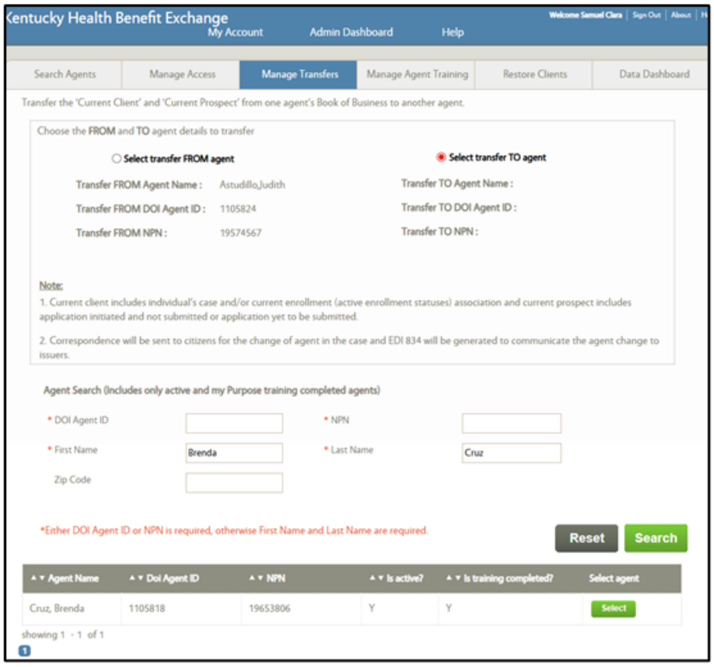
Transfer Specific Client(s) (Custom Transfer)

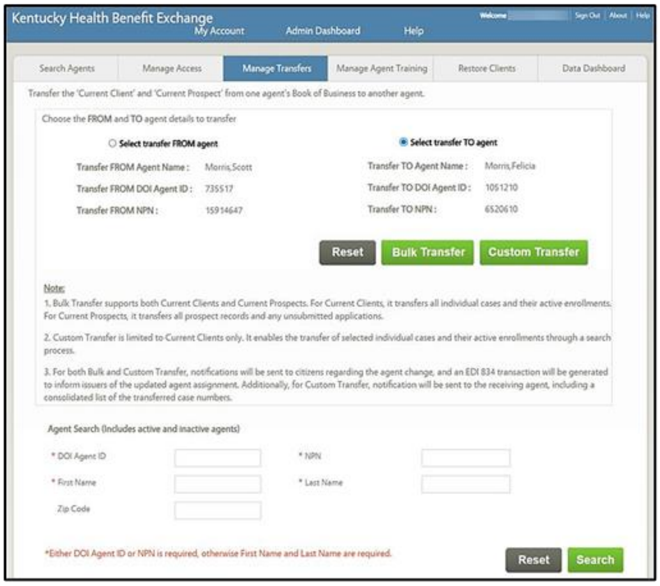
The initial step in transferring a specific client or list of specific clients from one Agent to another is to search for and select the transfer **FROM Agent** and the transfer **TO Agent**.

To search for the **FROM Agent**, click the **Select transfer FROM agent** radio button, enter the search criteria, and click **Search**. After the *Search Results* section populates, click the **Select** button next to the applicable Agent and then click **OK** in the pop-up that displays asking if the correct Agent was selected. The **FROM Agent** information then displays on screen.

Next, click the **Select transfer TO agent** radio button, enter the search criteria, and click **Search**. After the *Search Results* section populates, click the **Select** button next to applicable Agent and then click **OK** in the pop-up that displays asking if the correct agent was selected. The **TO Agent** information displays on screen.

Click **Custom Transfer**.





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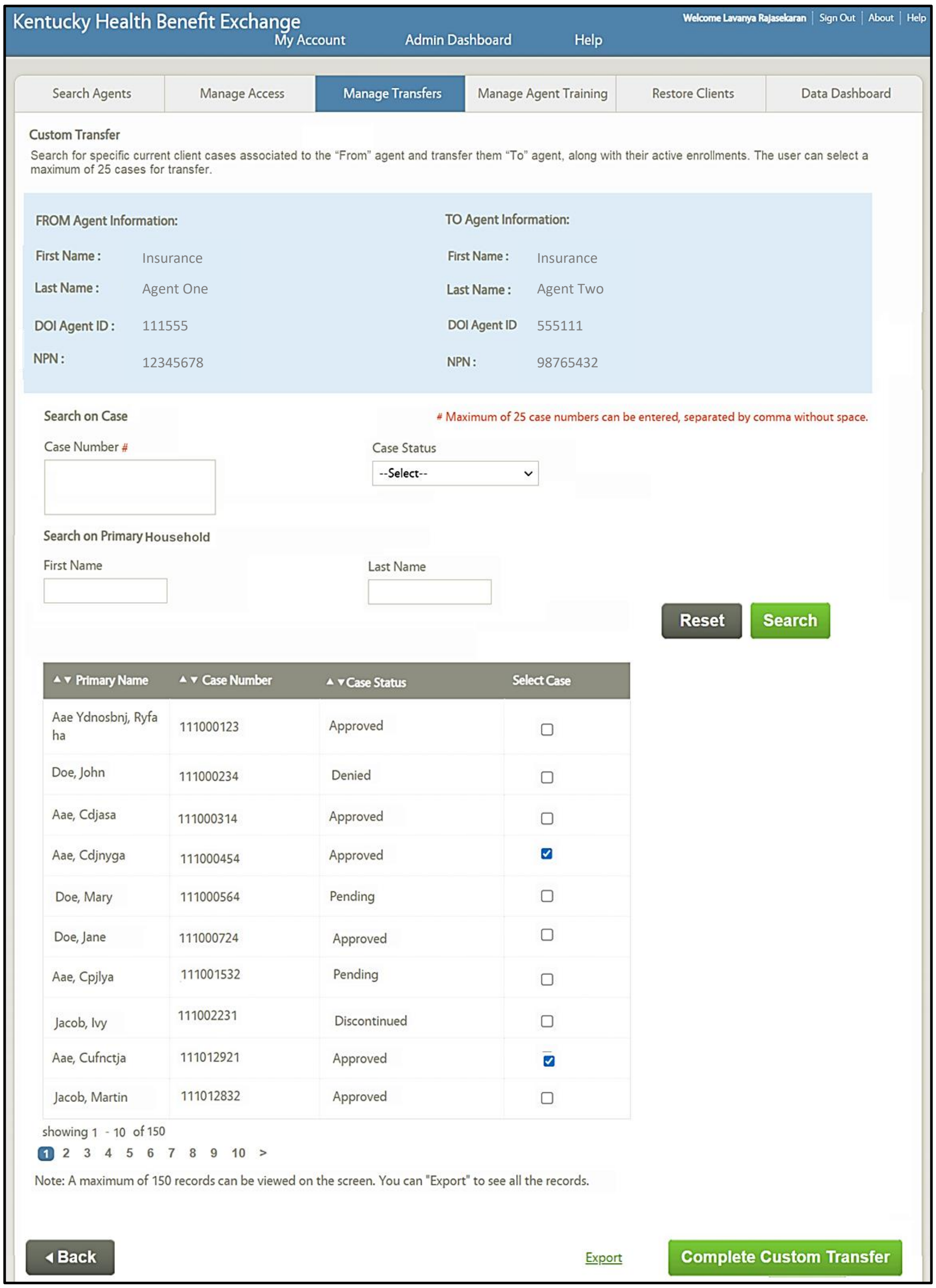
Agent to Agent Transfer Fact Sheet

Transfer Specific Client(s) (Custom Transfer) - *Continued*

On the **Custom Transfer** screen, verify the FROM and TO Agents are correct. Enter the **search criteria** in the *Search on Case* section and click **Search** to populate the *Search Results* section. Use the associated **check boxes** to select the case(s) to transfer. Click **Complete Custom Transfer**.



Agent to Agent Transfer Fact Sheet

Transfer Specific Client(s) (Custom Transfer) - *Continued*

Lastly, a **Transfer Alert** pop-up displays the following message: : "*Are you sure you made the correct selections to transfer the agent's Book of Business? If yes, please continue transfer, otherwise please close this alert and verify*." To finalize the transfer, click **Continue to Transfer** in the pop-up. The selected client(s) are transferred from the FROM Agent's book of business to the TO Agent.

Using Custom Transfer, the system can process a maximum of 25 cases in a single transaction.

Please Note: The Custom Transfer process cannot be used to transfer current prospects, abandoned prospects, or former clients.

Agent to Agent Transfer - Correspondence

For both Bulk Transfers and Custom Transfers, notifications will be sent to Individuals informing them about the Agent change on their case. Additionally, Issuers will also be notified of the updated Agent assignment.

Regarding Custom Transfers, notification will be sent to the receiving Agent (TO Agent). This notification induces a consolidated list of transferred case numbers and is accessible from the **Message Center** on Agent Portal.