



## Agent to Agent Transfer Fact Sheet

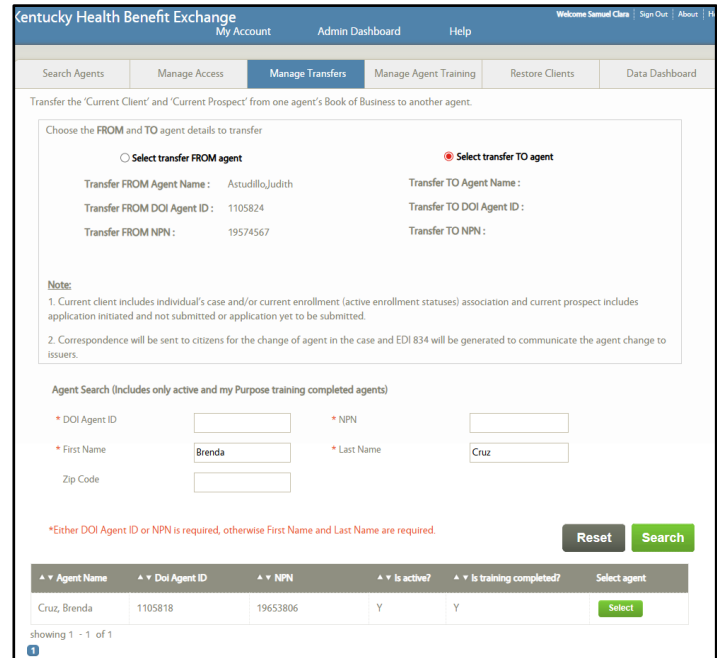
Using the **Manage Transfers** screen found on the **Admin Dashboard**, Agent Portal users with the Admin role can transfer all current clients and all current prospects from one Agent's Book of Business to another Agent. They can also transfer a specific client (or clients) from one Agent to another 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**, select the **Select transfer FROM agent** radio button, enter the **search criteria**, and select **Search**. After the *Search Results* section populates, select the **Select** button next to the applicable Agent and then select **OK** in the pop-up that displays asking if the correct Agent was selected. The **FROM Agent** information then displays.

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



Transfer the 'Current Client' and 'Current Prospect' from one agent's Book of Business to another agent.

Choose the FROM and TO agent details to transfer

Select transfer FROM agent       Select transfer TO agent

Transfer FROM Agent Name: Astudillo, Judith      Transfer TO Agent Name: \_\_\_\_\_  
 Transfer FROM DOI Agent ID: 1105824      Transfer TO DOI Agent ID: \_\_\_\_\_  
 Transfer FROM NPN: 19574567      Transfer TO NPN: \_\_\_\_\_

**Note:**  
 1. Current client includes individual's case and/or current enrollment (active enrollment statuses) association and current prospect includes application initiated and not submitted or application yet to be submitted.  
 2. Correspondence will be sent to citizens for the change of agent in the case and EDI 834 will be generated to communicate the agent change to issuers.

Agent Search (Includes only active and my Purpose training completed agents)

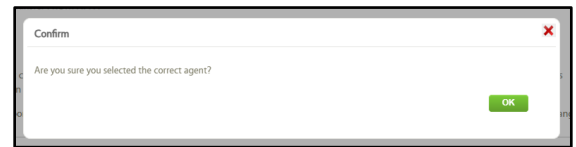
\* DOI Agent ID: \_\_\_\_\_ \* NPN: \_\_\_\_\_  
 \* First Name: Brenda \* Last Name: Cruz  
 Zip Code: \_\_\_\_\_

\*Either DOI Agent ID or NPN is required, otherwise First Name and Last Name are required.

Reset Search

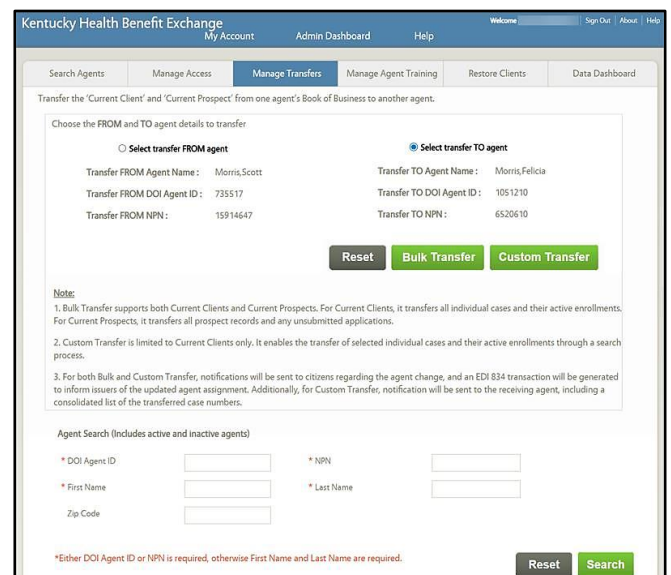
Agent Name	DOI Agent ID	NPN	Is active?	Is training completed?	Select agent
Cruz, Brenda	1105818	19653806	Y	Y	Select

showing 1 - 1 of 1



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

Lastly, select **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, select **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**.



Transfer the 'Current Client' and 'Current Prospect' from one agent's Book of Business to another agent.

Choose the FROM and TO agent details to transfer

Select transfer FROM agent       Select transfer TO agent

Transfer FROM Agent Name: Morris, Scott      Transfer TO Agent Name: Morris, Felicia  
 Transfer FROM DOI Agent ID: 735517      Transfer TO DOI Agent ID: 1051210  
 Transfer FROM NPN: 15914647      Transfer TO NPN: 6520610

Reset Bulk Transfer Custom Transfer

**Note:**  
 1. Bulk Transfer supports both Current Clients and Current Prospects. For Current Clients, it transfers all individual cases and their active enrollments. For Current Prospects, it transfers all prospect records and any unsubmitted applications.  
 2. Custom Transfer is limited to Current Clients only. It enables the transfer of selected individual cases and their active enrollments through a search process.  
 3. For both Bulk and Custom Transfer, notifications will be sent to citizens regarding the agent change, and an EDI 834 transaction will be generated to inform issuers of the updated agent assignment. Additionally, for Custom Transfer, notification will be sent to the receiving agent, including a consolidated list of the transferred case numbers.

Agent Search (Includes active and inactive agents)

\* DOI Agent ID: \_\_\_\_\_ \* NPN: \_\_\_\_\_  
 \* First Name: \_\_\_\_\_ \* Last Name: \_\_\_\_\_  
 Zip Code: \_\_\_\_\_

\*Either DOI Agent ID or NPN is required, otherwise First Name and Last Name are required.

Reset Search





# Agent to Agent Transfer Fact Sheet

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

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

Select **Custom Transfer**.

Kentucky Health Benefit Exchange  
My Account Admin Dashboard Help

Search Agents Manage Access **Manage Transfers** Manage Agent Training Restore Clients Data Dashboard

Transfer the 'Current Client' and 'Current Prospect' from one agent's Book of Business to another agent.

Choose the FROM and TO agent details to transfer

Select transfer FROM agent  Select transfer TO agent

Transfer FROM Agent Name : Asudillo, Judith Transfer TO Agent Name :  
 Transfer FROM DOI Agent ID : 1105824 Transfer TO DOI Agent ID :  
 Transfer FROM NPN : 19574567 Transfer TO NPN :

Note:  
 1. Current client includes individual's case and/or current enrollment (active enrollment statuses) association and current prospect includes application initiated and not submitted or application yet to be submitted.  
 2. Correspondence will be sent to citizens for the change of agent in the case and EDI 834 will be generated to communicate the agent change to issuers.

Agent Search (Includes only active and my Purpose training completed agents)

\* DOI Agent ID  \* NPN   
 \* First Name  Brenda \* Last Name  Cruz  
 Zip Code

\*Either DOI Agent ID or NPN is required, otherwise First Name and Last Name are required.

Reset Search

Agent Name	DOI Agent ID	NPN	Is active?	Is training completed?	Select agent
Cruz, Brenda	1105818	19653806	Y	Y	Select

showing 1 - 1 of 1

Kentucky Health Benefit Exchange  
My Account Admin Dashboard Help

Search Agents Manage Access **Manage Transfers** Manage Agent Training Restore Clients Data Dashboard

Transfer the 'Current Client' and 'Current Prospect' from one agent's Book of Business to another agent.

Choose the FROM and TO agent details to transfer

Select transfer FROM agent  Select transfer TO agent

Transfer FROM Agent Name : Morris, Scott Transfer TO Agent Name : Morris, Felicia  
 Transfer FROM DOI Agent ID : 735517 Transfer TO DOI Agent ID : 1061210  
 Transfer FROM NPN : 15934647 Transfer TO NPN : 6520610

Note:  
 1. Bulk Transfer supports both Current Clients and Current Prospects. For Current Clients, it transfers all individual cases and their active enrollments. For Current Prospects, it transfers all prospect records and any unsubmitted applications.  
 2. Custom Transfer is limited to Current Clients only. It enables the transfer of selected individual cases and their active enrollments through a search process.  
 3. For both Bulk and Custom Transfer, notifications will be sent to citizens regarding the agent change, and an EDI 834 transaction will be generated to inform issuers of the updated agent assignment. Additionally, for Custom Transfer, notification will be sent to the receiving agent, including a consolidated list of the transferred case numbers.

Agent Search (Includes active and inactive agents)

\* DOI Agent ID  \* NPN   
 \* First Name  \* Last Name   
 Zip Code

\*Either DOI Agent ID or NPN is required, otherwise First Name and Last Name are required.

Reset Bulk Transfer Custom Transfer Search

Agent Name	DOI Agent ID	NPN	Is active?	Is training completed?	Select agent
Morris, Felicia	1061210	6520610	Y	Y	Select





# 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 select **Search** to populate the *Search Results* section. Use the associated **check boxes** to select the case(s) to transfer. Select **Complete Custom Transfer**.

Kentucky Health Benefit Exchange
Welcome Lavanya Rajasekaran | Sign Out | About | Help

My Account
Admin Dashboard
Help

Search Agents
Manage Access
Manage Transfers
Manage Agent Training
Restore Clients
Data Dashboard

**Custom Transfer**  
 Search for specific current client cases associated to the "From" agent and transfer them "To" agent, along with their active enrollments. The user can select a maximum of 25 cases for transfer.

<p><b>FROM Agent Information:</b></p> <p>First Name : Insurance              Last Name : Agent One              DOI Agent ID : 111555              NPN : 12345678</p>	<p><b>TO Agent Information:</b></p> <p>First Name : Insurance              Last Name : Agent Two              DOI Agent ID : 555111              NPN : 98765432</p>
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**Search on Case** # Maximum of 25 case numbers can be entered, separated by comma without space.

Case Number #  Case Status --Select--

**Search on Primary Household**

First Name  Last Name

Reset
Search

Primary Name	Case Number	Case Status	Select Case
Aae Ydnosbnj, Ryfaha	111000123	Approved	<input type="checkbox"/>
Doe, John	111000234	Denied	<input type="checkbox"/>
Aae, Cdjasa	111000314	Approved	<input type="checkbox"/>
Aae, Cdjnyga	111000454	Approved	<input checked="" type="checkbox"/>
Doe, Mary	111000564	Pending	<input type="checkbox"/>
Doe, Jane	111000724	Approved	<input type="checkbox"/>
Aae, Cpjlya	111001532	Pending	<input type="checkbox"/>
Jacob, Ivy	111002231	Discontinued	<input type="checkbox"/>
Aae, Cufnctja	111012921	Approved	<input checked="" type="checkbox"/>
Jacob, Martin	111012832	Approved	<input type="checkbox"/>

showing 1 - 10 of 150

1
2
3
4
5
6
7
8
9
10
 >

Note: A maximum of 150 records can be viewed on the screen. You can "Export" to see all the records.

Back
Export
Complete Custom Transfer

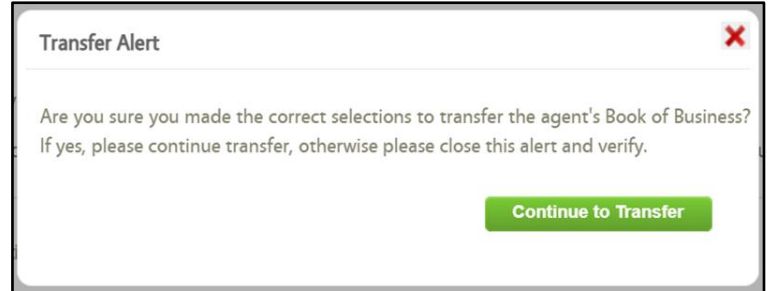


## Agent to Agent Transfer Fact Sheet

### 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, select **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.

