

Overview

This guide provides agents and certified enrollers steps for delegating, de-delegating, and transferring Consumer Cases or Book of Business (BoB).

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Background

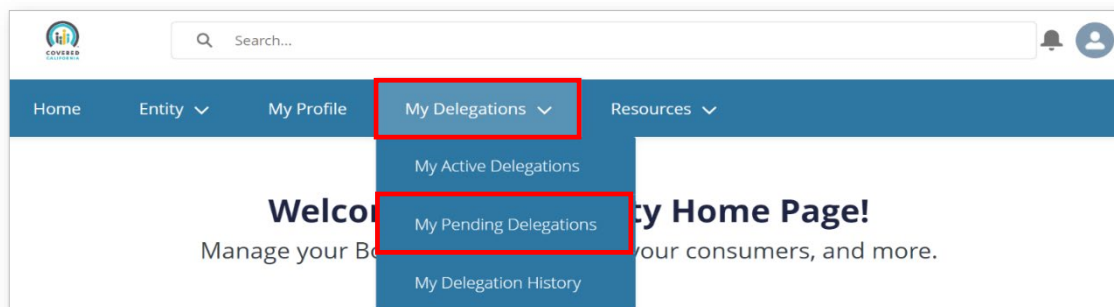
This guide is for Level 1 and Level 2 Agents, Agency Managers, and Approved Admin Staff, and for Certified Enrollment Counselors (CEC), Entity Managers, **Plan Based Enroller (PBE)**, and **Medi-Cal Managed Care Plan Enroller (MMCPE)**.

Consumers can work with Counselors to apply for coverage. When a Counselor begins an application on behalf of the Consumer a delegation occurs automatically.

Accept or Decline a Delegation Request

The Counselor must accept the delegation to access the Consumer's account or application. **This section illustrates a Counselor's perspective; however, Agents have similar functionality.** The Counselor accepts a delegation request by following these steps:

1. Log into CoveredCA and select **My Pending Delegations** from the **My Delegations** dropdown. The *My Pending Delegations* list view displays.





2. To accept a pending delegation request:

- Select the checkbox next to the Consumer's name and click the **Accept Delegations** button
- Select the checkbox next to the *Consumer Contact* column label, and click the **Accept Delegations** button to accept all pending delegation requests.

Delegations
My Pending Delegations

2 items • Sorted by Consumer Contact • Filtered by My delegations • Delegation Status • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> Consumer Contact ↑	CalHEERS Case/Applicati...	Delegation Status	Request Sent Date	Delegation Name
1	<input type="checkbox"/> Adam Apple	1357100430	Pending	2/8/2023 12:15 AM	D-01408
2	<input type="checkbox"/> Barry Barnes	1357100429	Pending	2/8/2023 12:15 AM	D-01407

3. To decline a pending delegation request

- Select the checkbox next to a Consumer's name, and click the **Decline Delegations** button

The Consumer displays in the Counselor's *My Active Delegations* list view on the *Delegations* page when delegation is complete.

- Clicking a Consumer's name link from the *Consumer Contact* column displays the Consumer's *Contact* page
- Clicking the **Consumer Case** link in the *Quick Links* section navigates the Counselor to the *Consumer Home* page

Contact
Adam Apple

Get Realtime Consumer Info

Account Name: RbjXqERV bcoPaFvU Household | Phone: (989) 898-9897 | Email: | CalHEERS Case/Application ID: 5193226491

Name: Adam Apple | Account Name: RbjXqERV bcoPaFvU Household | Birthdate: 6/4/1989 | SSN Last 4: 6786

Quick Links
Consumer Case

Head of Household Information

Head of Household First Name: Adam | Head of Household Email: | Head of Household Middle Name: | Head of Household Home Phone No: |

Applications (1)

Con...	Status	Medi...	Appli...
1357...	SUBM...		13571... ▼

- Clicking a link under the *Delegation Name* column displays the *Delegation* page with the functionality to **Accept Delegation**, **Decline Delegation**, and **Mark as Inactive** buttons

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Removing Delegation

Agents can remove a Consumer from **their** Book of Business (BoB) **on the Consumer's Delegation page**. This section illustrates the steps from the Agent perspective; however, Counselors have similar functionality. To remove a Consumer from an Agent's Book of Business:

1. Select **My Active Delegations** from the **My Delegations** dropdown. **The My Active Delegations list view on the Delegations page displays.**

Home Agency My Team My Profile **My Delegations** Resources

Welcome to your Agency Home Page!
Manage your agency and your consumers, and more.

Agency Book of Business My Book of Business Consumer Enrollments By Met...

Report: Contact Application and Enrollees
Book of Business by Enroller Contact

Total Records
1

<input type="checkbox"/>	Enroller Contact ↑	CalHEERS Case ID	Year of Application	First Name	Middle Name	Last Name
<input type="checkbox"/>	Michelle-Agency-AM1 AM1 (1)	5193201235	2023	danny	middle	man

Quick Links

- Secure Mailbox
- Delegation Tool
- Start Application
- Enroller Toolkits
- My Reports

2. Click a link from the **Delegation Name** column. **The Delegation page displays.**

Delegations
My Active Delegations

50+ items • Sorted by Delegation Start Date • Filtered by My delegations - Delegation Status • Updated a minute ago

Accept Delegations Decline Delegations


Search this list...

<input type="checkbox"/>	Consumer Contact	CalHEERS Case/Applic...	Phone	Email	Household Eligi...	Consent Vali...	Delegation ...	Delegation Name
<input type="checkbox"/>	DelegationTCone Enr...	5193225261			CoveredCA Only	2028	2/27/2023 7:31 AM	D-01288
<input type="checkbox"/>	test user	5193227579		c@gmail...	CoveredCA Only	2028	2/21/2023 8:36 PM	D-01911
<input type="checkbox"/>	MemOnetzYJlCP Me...	5193225766			CoveredCA Only	2028	2/7/2023 3:48 AM	D-01400
<input type="checkbox"/>	MemOneDCFPHEEF ...	5193225751			CoveredCA Only	2028	2/7/2023 3:00 AM	D-01393
<input type="checkbox"/>	MemOneNaOkjil Me...	5193225736			CoveredCA Only	2028	2/7/2023 2:19 AM	D-01392
<input type="checkbox"/>	MemOnesgNrHjzF M...	5193225729			CoveredCA Only	2028	2/7/2023 1:31 AM	D-01390

3. Click the **Mark as Inactive** button.



Delegating and Removing Delegation Task Guide

 Delegation D-01241		Accept Delegation	Decline Delegation	Mark as Inactive
CalHEERS Case/Application ID ⓘ 1000150723-2022		Enroller Contact Karthik AgentLv2		
Consumer Contact ⓘ Monica Geller		Agency/Entity Name Multi-Lokiverse Agency		
Consumer Household Monica Geller Household		Delegation Status ⓘ Active		
Family Size 6		Request Sent Date 2/2/2023 6:20 AM		
Delegation Name D-01241		Delegation Start Date ⓘ 2/2/2023 6:20 AM		

- The **Mark as Inactive** popup displays. Click the **Save** button. The Consumer is removed from the *Active Delegations* list.
 - Clicking the **Cancel** button navigates the **Agent back to the Delegation page**

Mark as Inactive

Delegation Status ⓘ
Active

Please Read :

This action cannot be undone and you cannot reactivate this delegation unless the consumer provides consent or actively re-delegates access to you. Note: marking an existing delegation as inactive may impact your commission.

Cancel

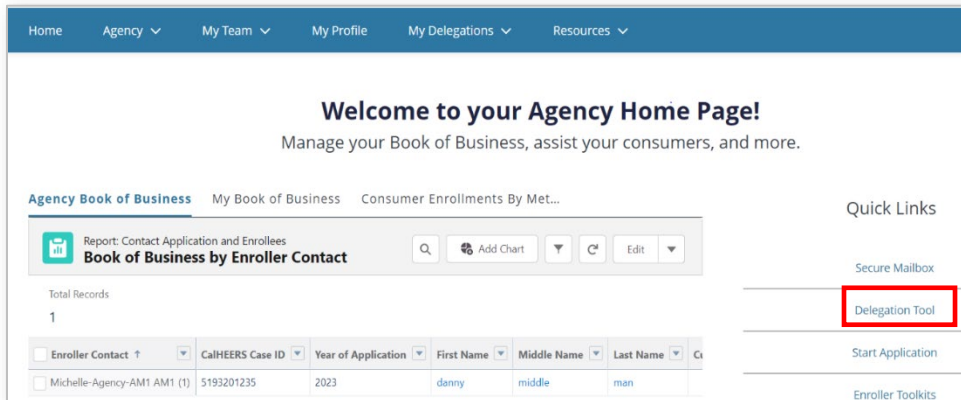
Save

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Delegation Tool

The *Delegation Tool* provides a means for Agents and Counselors to self-serve and delegate a Consumer's case to their BoB. Counselors, Agents, Entity Managers and Agency Managers access the **Delegation Tool** link from the *Quick Links* section on the *Welcome to your Agency Home Page!*. The following steps illustrate the process by which both Agents and Counselors access the Delegation Tool.

To begin the delegation process, the Agent must first search for and identify the active Consumer.



1. Click the **Delegation Tool** link from the *Quick Links* section on the *Welcome to your Agency Home Page!*. The *Consumer Delegation* page displays.
2. Enter the following Consumer information on the *Delegation Form*:
 - First name
 - Last name
 - Date of birth

The *Does the Consumer have a Social Security number?* section is optional and displays with a **Yes** and **No** radio button. The radio button defaults to **Yes** and displays the **Social Security number (SSN)** field.



Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.

Delegation Form

Step 1 of 4

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

Do not enter an ATIN/ITIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

☒ Yes ☐ No

Social Security number (SSN) *Optional*

Consumer Consent to Delegate Case to Agent

Step 2 of 4

Hannahupdated.

Please read the below statements to the Consumer for delegation consent. Please select the checkboxes below to provide consent for each statement on behalf of the Consumer.

☐ I understand that I must provide my personally identifiable information in order to complete the eligibility and enrollment process. I authorize this Agent to access, enter, and update my personally identifiable information into the online application. I further understand that this Agent may access my personally identifiable information in the future if I request any changes to my health coverage.

☐ I understand that I may end my partnership with this Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

☐ I grant permission to the Agent to enter payment information in my online account. I understand that the insurance premium that I am quoted will be charged to my account. I further grant permission to the Agent to submit my completed application, including activating an e-signature on my behalf.


☐ I authorize this Agent to serve as my Agent of Record. If this Agent is affiliated with an Agency, I understand that the Agency may delegate a new Agent to serve as my Agent of Record in the future. I understand that a newly delegated Agent will have access to my personally identifiable information in order to service my account. I further understand that I may end my partnership with a newly delegated Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

3. Enter the SSN.



- An error message displays when the SSN is not a nine-digit number
- Clicking the No radio button in the *Does the Consumer have a Social Security number?* field displays the following and requires at least one search criteria option:
 - A message: *You must provide at least one of the following search criteria before you can proceed with delegation displays*


Does the Consumer have a Social Security number?

 Do not enter an ATIN/ITIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

☐ Yes ☒ No

You must provide **at least one** of the following search criteria before you can proceed with delegation.

Hint: This information will be used to search the database based on the information entered when the case was last modified.

Home Address Add
 RECOMMENDED

Cell Phone Number Add

Email Address Add

- Search criteria options: Home Address, Cell Phone Number, or Email Address. An Add button displays next to each option
 - Selecting an option dynamically displays a required entry field
 - Clicking the Remove button removes the selected search option
- Note:** Searching by Home Address is recommended.
4. Check the box next to each statement in the *Consumer Consent to Delegate Case to [Agent's name]* section to indicate that the Consumer consents to the Agent to act on their behalf.



- An error message displays when a checkbox is unchecked
- Clicking all the checkboxes enables the Check for Consumer button

Consumer Consent to Delegate Case to Alan Lou. Step 2 of 4

Please read the below statements to the Consumer for delegation consent. Please select the checkboxes below to provide consent for each statement on behalf of the Consumer.

☒ I understand that I must provide my personally identifiable information in order to complete the eligibility and enrollment process. I authorize this Agent to access, enter, and update my personally identifiable information into the online application. I further understand that this Agent may access my personally identifiable information in the future if I request any changes to my health coverage.

☒ I understand that I may end my partnership with this Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

☒ I grant permission to the Agent to enter payment information in my online account. I understand that the insurance premium that I am quoted will be charged to my account. I further grant permission to the Agent to submit my completed application, including activating an e-signature on my behalf.

☒ I authorize this Agent to serve as my Agent of Record. If this Agent is affiliated with an Agency, I understand that the Agency may delegate a new Agent to serve as my Agent of Record in the future. I understand that a newly delegated Agent will have access to my personally identifiable information in order to service my account. I further understand that I may end my partnership with a newly delegated Agent at any time through my Account Dashboard or by calling 1-800-300-1506.

[Cancel](#) [Check for Consumer](#)

Note: Clicking the **Cancel** button navigates the Agent to the **Welcome to your Agency Home Page!**



- Click the **Check for Consumer** button to initiate a search based on the criteria entered. The system conducts a match based on the information entered. One of the following displays:

- No Match Found** – No existing match found in the system

No Match Found

Based on the details you provided, we were unable make a match to our database. If you would like to start a new application, please select the Return to Enroller Dashboard button to begin the process. If you would like to try again, please select the Start Over button to re-enter details. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)[Start Over](#)

- The **Return to Enroller Dashboard** button navigates the Agent to the **Welcome to your Agency Home Page!**

- The **Start Over** button navigates the Agent to the *Consumer Delegation* page

- Multiple Matches Found** – Multiple matches found in the system

Multiple Matches Found

Based on the details you provided, we were not able to find a single match in our database. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)

- Match Already Delegated** – Match found and is currently delegated to the Agent

Match Already Delegated

Based on the details you provided, we found a match in our database that is already delegated to your book of business. If you would like to try again, please select the button below. If you have questions about the results of your match, please contact the Service Center at [877-453-9198].

[Return to Enroller Dashboard](#)



The next step in the delegation process is to authenticate the Consumer. The *One Match Found* page displays when an exact match is found.

One Match Found
Success: Based on the details you provided, one Consumer match has been found.

Step 3 of 4

One Time Text Message Verification
Please enter the phone number that will receive an authentication code.

Cell phone number
(916) 777-9311

Re-enter cell phone number
(916) 777-9311

☒ I acknowledge that the individual for which I am applying has read, understood and agrees to be bound by the Covered California [SMS Terms Of Service](#). Also, the individual for which I am applying has provided consent to receive autodialed and pre-recorded calls and/or text/SMS messages (message frequency varies) at the telephone number I provided (including my cell phone number), from or on behalf of Covered California. The individual for which I am applying understands that this is not a condition of receiving services. Message and data rates may apply.

Send Authentication Code to Consumer
Send One Time Authentication Code

Step 4 of 4

A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you close this window, the Authentication Code will no longer be valid.

Enter One Time Authentication Code
78458

Cancel Submit

6. On the *One Match Found* page enter the Consumer's cell phone in the cell phone number fields.
7. Check the **SMS Terms Of Service** checkbox to continue.



8. Click the **Send One Time Authentication Code** button. A code is sent to the cell phone number entered.
 - Up to three authentication codes can be requested. The user has three attempts to successfully enter each code
 - A total of nine attempts with the incorrect code disables all fields except for the **Return to Enroller Dashboard** button

Step 4 of 4

A One Time Authentication Code has been sent to the cell phone number you entered. This Authentication Code is valid for 15 minutes. If you close this window, the Authentication Code will no longer be valid.

Enter One Time Authentication Code:

12349

Validation attempt unsuccessful. Please return to the Enroller Dashboard or contact the Service Center at [855-324-3147] for help.

Return to Enroller Dashboard

Note: The authentication code becomes invalid after 15 minutes and when the page is closed. Clicking the Cancel button navigates the user to their respective home page.

9. Click the **Submit** button on the *One Match Found* page. One of the following popups displays:
 - *The delegation process was successful* – Consumer's case is successfully delegated

The delegation process was successful

Dani Targaryeon has been successfully added to your book of business.

Return to Enroller Dashboard View Consumer Home

- *The delegation process was unsuccessful* – Due to a system error popup displays

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Approved Agency Admin Staff Level 1 and Level 2

Approved Admin Staff **Level 1 and 2** may delegate a Consumer on behalf of an Agent. The Admin Staff first conducts a search for an active Agent **and accesses the Agent's Contact page** before continuing with the delegation process.

1. **Select **Team List** from the **My Team** dropdown menu on the *Welcome to your Agency Home Page!*. The *My Agency Enrollers* list view on the *Contacts* page displays.**

2. **Enter one of the following search criteria in the **Search this list...** field:**

- **Name**
- **Enroller License Number**
- **Email**
- **Phone**
- **Certification/Approval Status**

3. **Select the desired delegate by clicking on the link associated to the Agent from the list of names displaying under the *Name* column. The Agent's *Contact* page displays.**



Contact
Michelle-Agency-AS AS Edit

Role Authorized Signer	Account Name Michelle-Agency	Phone (456) 332-1478	Email vishal.p.somani@calheers.ca.gov
---------------------------	---	-------------------------	---

Name Michelle-Agency-AS AS	Account Name Michelle-Agency
Role Authorized Signer	
Preferred Method of Communication ⓘ	
Email	
Phone (456) 332-1478	

Quick Links

- [Delegation Tool](#)
- [Start Application](#)
- [Enroller Toolkits](#)

4. Click the **Delegation Tool** link in the *Quick Links* section. The *Consumer Delegation* page displays.
5. The Admin Staff completes the delegation process similar to all other users.

Consumer Delegation

We need some very important information about your Consumer so that we can search for them in our database.

Delegation Form Step 1 of 4

Enter information below to delegate yourself to this Consumer's case. The information to be entered below is confidential. Please consider before proceeding.

First name

Last name

Date of birth

Does the Consumer have a Social Security number?

Do not enter an ATIN/ITIN. It will not result in a match. If the Consumer does not have a Social Security number, please select "No" to provide another form of identification.

☒ Yes ☐ No

Social Security number (SSN) *Optional*

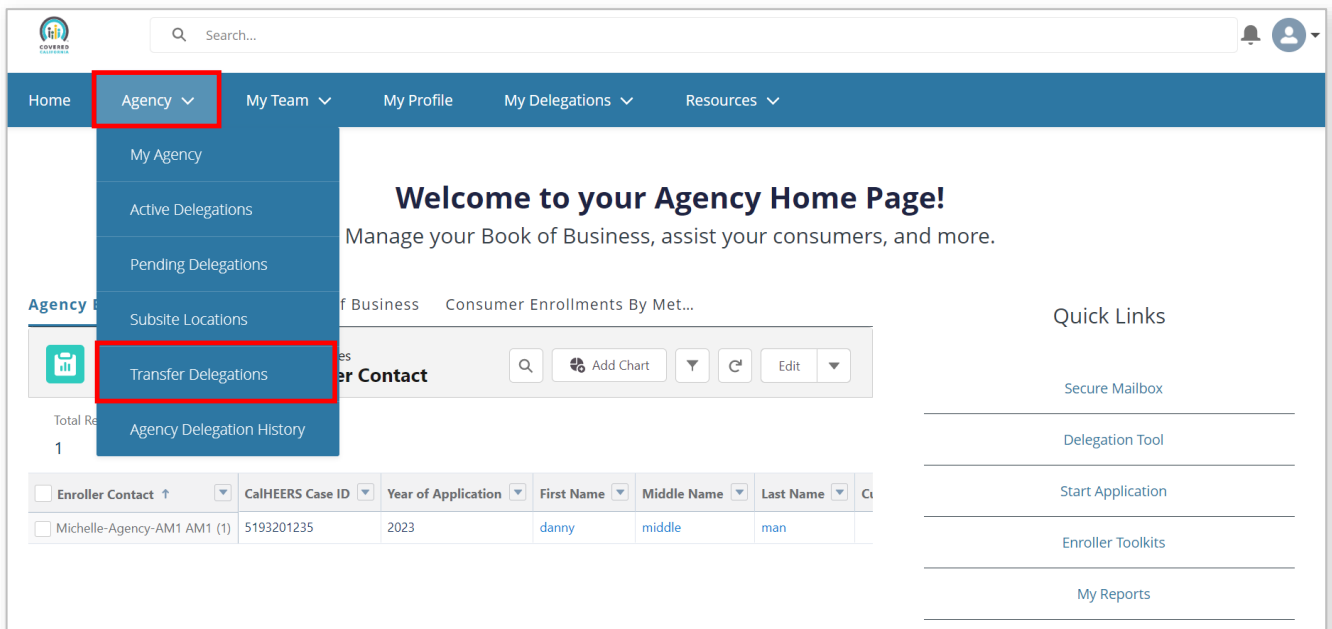
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Transfer Consumer Delegations

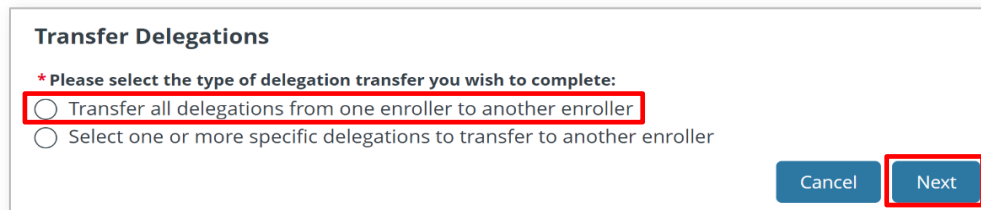
Agency Managers and Entity Managers can transfer a user's entire BoB or specific Consumer cases from one user to another user within their Agency or Entity on the *Transfer Delegations* page. Additionally, Agency Admins and Entity Admins can transfer an entire BoB from one user to another user across different Agencies and Entities on the *Transfer Book Of Business* page. The section is written from the Agency Manager's perspective; however, Entity Managers have the same functionality.

To transfer an Agent's entire BoB:

1. Select **Transfer Delegations** from the **Agency** dropdown on the *Welcome to your Agency Home Page*. The *Transfer Delegations* page displays.



2. Select the **Transfer all delegations from one enroller to another enroller** radio button
3. Click the **Next** button.



- Clicking the **Cancel** button navigates the user back to the *Welcome to your Agency Home Page*.



4. Search for the Agent whose BoB is being transferred using the **Search** field on the *Select the source enroller for the delegation transfer* page. Agents may use the following parameters to search:

- **Name**
- **Email**
- **License/Certification Number**
- **Role**

Select the source enroller for the delegation transfer

Search

<input type="checkbox"/>	Name	Email	License Number	Certification/Approval Status	Contact Status	Role
<input type="checkbox"/>	Zuchini Dominic aa	zuchini.dominic@mailinator...	6789JAA	Certified	Active	Agency Manager Level 2
<input type="checkbox"/>	Austin AustinAML1	austinaustinam1@mailinat...	JIO0987	Certified	Active	Agency Manager Level 1
<input type="checkbox"/>	dwayne2 bravo One	bravo@mailinator.com	7269879	Certified	Active	Agent Level 1
<input type="checkbox"/>	Tom Holland	parker@mailinator.com	4567788	Certified	Active	Agent Level 2
<input type="checkbox"/>	andy wood	andy@mailinator.com	jjsj928	Certified	Active	Agent Level 2
<input type="checkbox"/>	MARSHAL ONE	marshalone@mailinator.co...	EVE1236	Certified	Active	Agent Level 2
<input type="checkbox"/>	Olivia Olivia	olivia.olivia@mailinator.com	P896569	Certified	Active	Agent Level 1

5. Select the checkbox next to an enroller's name.

6. Click the **Next** button.

- An error message displays when more than one enroller is selected
- Clicking the **Cancel** button navigates the user to the *Transfer Delegations* page

7. Search for an Agent to receive the BoB transfer using the **Search** field on the *Select the target enroller for the delegation transfer* page. Agents may use the following search parameters:

- **Name**
- **Email**
- **License/Certification Number**
- **Role**

8. Select the checkbox next to an enroller's name.



9. Click the **Transfer Delegation(s)** button.

Only enrollers in Certified and Active status can receive delegation transfers.

Select the target enroller for the delegation transfer

Search ⓘ



<input type="checkbox"/>	Name	Email	License Number	Certification/Approv...	Contact Status	Role
<input type="checkbox"/>	Zuchini Dominic aa	zuchini.dominic@mailinato...	6789JAA	Certified	Active	Agency Manager Level 2
<input type="checkbox"/>	Austin AustinAML1	austinaustinam1@mailinat...	JIO0987	Certified	Active	Agency Manager Level 1
<input type="checkbox"/>	dwayne2 bravo One	bravo@mailinator.com	7269879	Certified	Active	Agent Level 1
<input type="checkbox"/>	andy wood	andy@mailinator.com	jjsj928	Certified	Active	Agent Level 2
<input type="checkbox"/>	MARSHAL ONE	marshalone@mailinator.co...	EVE1236	Certified	Active	Agent Level 2
<input type="checkbox"/>	Olivia Olivia	olivia.olivia@mailinator.com	P896569	Certified	Active	Agent Level 1
<input type="checkbox"/>	Pavan Kumar	pavan.kumar@mailinator.c...	N965698	Certified	Active	Agent Level 1

Cancel



Transfer Delegation(s)

Note: Only enrollers in Certified and Active status can receive delegation transfers. error message displays when an enroller does not have these statuses.


Transfer is in progress. You will see a notification on the bell icon when the request is complete


Return to Home Page

A message displays that the transfer is in progress. Clicking the **Return to Home Page** button navigates the user to the *Welcome to your Agency Home Page!*



Notifications

[Mark all as read](#) 

**Delegation Transfer Status**

Consumer Case(s) successfully transferred to AgentDuke Ellis

3 minutes ago •



A *Delegation Transfer Status* popup displays with a successful message.



Delegation Transfer Status

One or more Consumer Cases did not transfer. Please check the Consumer Case(s) you were trying to transfer and try again. If you continue to see this error, please call the Agent/CEC Service Center. Record ID IL-0066843. Please note this Record ID for future reference.

2 minutes ago •

Note: The *Delegation Transfer status* displays an error when the transfer is not successful

The steps illustrated above to transfer specific case(s) between Agents are identical for an Agency Manager.

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Exporting an Agent's Book of Business

The *Welcome to your Agency Home Page!* includes an *Agency Book of Business* tab which displays the *Book of Business by Enroller Contact* report, allowing Agency Managers to search for an Agent and export their BoB. The section is written from the Agency Managers perspective; however, Entity Managers have the same functionality.

To export an Agent's BoB:

1. From the *Welcome to your Agency Home Page!*, click the magnifying glass icon to display the *Search report table* field to search for the enroller.

The screenshot shows the 'Agency Book of Business' interface. At the top, there are tabs for 'Agency Book of Business', 'My Book of Business', and 'Consumer Enrollments By Metal Tier Plan'. Below the tabs, there's a header for 'Report: Contact Application and Enrollees' and 'Book of Business by Enroller Contact'. A search bar is present with a magnifying glass icon. To the right of the search bar are buttons for 'Enable Field Editing', 'Add Chart', 'Edit', 'Save As', and 'Export'. The 'Export' button is highlighted with a red box. Below the search bar, there's a table with columns: 'Enroller Contact', 'CalHEERS Case ID', 'Year of Application', 'First Name', 'Middle Name', 'Last Name', 'Customer DOB', 'SSN Last 4', and 'Residence Address'. The table contains several rows of data. The first row is for 'Austin AustinAML1 (2)' with CalHEERS Case ID '5193226161 (2)'. The second row is for 'Mike Ellis (28)' with CalHEERS Case ID '5193199718 (12)'. The table is filtered to show 70 total records. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

Enroller Contact	CalHEERS Case ID	Year of Application	First Name	Middle Name	Last Name	Customer DOB	SSN Last 4	Residence Address
Austin AustinAML1 (2)	5193226161 (2)	2023	shVvUvB	-	SdlyXlMw	6/19/1991	7864	2435 Fair Oaks Eve
		2023	rXKWPHX	-	flvOfyCS	6/4/1989	8812	2435 Fair Oaks Eve
Mike Ellis (28)	5193199718 (12)	2023	Marcus	-	Eufy	1/1/1988	8086	5201 Laguna Oaks
		2023	Isabelle	-	Eufy	6/20/1998	8043	5201 Laguna Oaks
		2023	Patty	-	Eufy	4/1/2012	8011	5201 Laguna Oaks
		2023	Isabelle	-	Eufy	6/20/1998	8043	5201 Laguna Oaks
		2023	Marcus	-	Eufy	1/1/1988	8086	5201 Laguna Oaks
		2023	Patty	-	Eufy	4/1/2012	8011	5201 Laguna Oaks
		2023	Marcus	-	Eufy	1/1/1988	8086	5201 Laguna Oaks
		2023	Amy	-	Eufy	4/1/1989	8066	5201 Laguna Oaks
		2023	Amy	-	Eufy	4/1/1989	8066	5201 Laguna Oaks
		2023	Patty	-	Eufy	4/1/2012	8011	5201 Laguna Oaks
		2023	Patty	-	Eufy	4/1/2012	8011	5201 Laguna Oaks
		2023	Patty	-	Eufy	4/1/2012	8011	5201 Laguna Oaks



Note: Clicking the Filter icon displays the *Filters* menu to filter the list of enrollers.

2. Select the checkbox next to the enroller's name.
3. Click the **Edit** dropdown arrow and select **Export**.

- The *Export* popup displays with the following export view options:

Export

Export View

Formatted Report ✓
Export the report, including the report header, groupings, and filter settings.

Details Only
Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format
Excel Format .xlsx

Cancel Export

- **Formatted Report:** Export the report, including the report header, groupings, and filter settings
- **Details Only:** Export only the details rows. Use this to do further calculations or for uploading to other systems
 - Selecting the **Details Only** tile enables the **Format** dropdown, and an **Encoding** field displays.

4. Click the **Export** button. The *Book of Business by Enroller Contact* report downloads to the user's local computer and displays in an excel file.

Book of Business by Enroller Contact
As of 2023-03-01 09:46:09 Pacific Standard Time/PST • Generated by Bernardo Silva

Filtered By
Show: All contact applications
Created Date greater or equal 1/6/2023 12:00 AM
Contact: Account Name: Delegation Status equals Active
Case Status equals ACTIVE
Contact: is Individual Inactive equals False

Enroller Contact	CalHEERS Case ID	Year of Application	First Name	Middle Name Last Name	Customer DOB SSN Last 4	Residence Address Line 1	Residence Address Line 2	Address - City	Address - State
Austin AustinAML1	5193226161	2023	sHvUuLVB	SdlyXMmw	6/19/1991 7864	2435 Fair Oaks Evergreen Park, Tuolumne, CA 95305		Tuolumne	CA
		2023	rXKWPHX	fivOfyCS	6/4/1989 8812	2435 Fair Oaks Evergreen Park, Tuolumne, CA 95305		Tuolumne	CA
Duke Ellis	5193199718	2023	Marcus	Eufy	1/1/1988 8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Isabelle	Eufy	6/20/1998 8043	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty	Eufy	4/1/2012 8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Isabelle	Eufy	6/20/1998 8043	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Marcus	Eufy	1/1/1988 8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty	Eufy	4/1/2012 8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Marcus	Eufy	1/1/1988 8086	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Amy	Eufy	4/1/1989 8066	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Amy	Eufy	4/1/1989 8066	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty	Eufy	4/1/2012 8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
		2023	Patty	Eufy	4/1/2012 8011	5201 Laguna Oaks Dr Unit 156, Elk Grove, CA 95758		Elk Grove	CA
	5193220968	2023	DweKILMK	KPyoCDN	10/10/1984 6871	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
	5193221091	2023	tOHIsqgv	OoKwKAX	10/10/1984 6875	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	tOHIsqgv	OoKwKAX	10/10/1984 6875	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
	5193221094	2023	TxeKQIQp	DYscDHxy	10/10/1984 7741	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
	5193221132	2023	VPafyDOX	KYnVIBNw	10/10/1984 7756	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
		2023	VPafyDOX	KYnVIBNw	10/10/1984 7756	Test Address 1 Test Address 2, Sacramento, CA 95833		Sacramento	CA
	5193221315	2023	steven	Jacobs	10/10/1990 8041	street of main colo1 null, alimire, CA 95833		alimire	CA
	5193221484	2023	thqoFWna	veamGdIR	1/12/1973 7743	2435 Fair Lake View, Sacramento, CA 95833		Sacramento	CA
		2023	thqoFWna	veamGdIR	1/12/1973 7743	2435 Fair Lake View, Sacramento, CA 95833		Sacramento	CA

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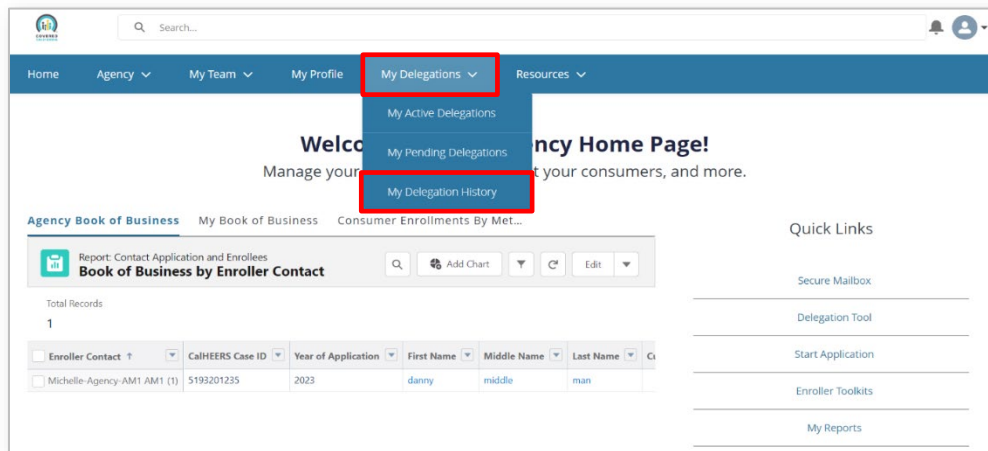
Exporting Your Own Book of Business

In addition to exporting a specific Agent's Book of Business, Agency Managers and Entity Managers can export their own BoB. **Agents, and Counselors** may also export the BoB using the same steps illustrated above with one minor difference: clicking the **My Book of Business** tab on the **Welcome to your Agency Home Page!**, the **My Book of Business** report displays.

My Delegation History

The **My Delegation History** list view on the **Delegation History** page displays the Agent's or Counselor's delegated Consumers when the delegation process is successful. This section is intended for Agency Managers; however, Entity Managers, Agents and Counselors have the same functionality.

1. Select the **My Delegations** tab dropdown.
2. Select the **My Delegation History** link.





The *My Delegation History* list view on the *Delegation History* page displays with the following Consumer information:

- Consumer Contact
- CalHEERS Case/Application ID
- Delegation Start Date
- Delegation End Date
- Reason for End
- Delegation History Name

Delegation History My Delegation History						
50+ items • Sorted by Delegation End Date • Filtered by My delegation history • Updated 8 minutes ago						
	Consumer Contact	CalHEERS Case/Ap...	Delegation Start Date	Delegation End Date ↓	Reason for End	Delegation History Name
1	Marcus Eufy	5193199718	2/15/2023 10:22 AM	2/28/2023 9:17 AM	Transfer within Agency/...	DH-0001994
2	rXKWtPHX fjvOFyCS	5193226161	2/9/2023 1:27 AM	2/17/2023 9:36 PM	Transfer within Agency/...	DH-0001818
3	bob harris	5193224709	2/1/2023 12:26 AM	2/14/2023 10:52 PM	Transfer within Agency/...	DH-0001479
4	Karim Benzema	5193219993	1/18/2023 4:20 AM	1/30/2023 5:07 AM	Consumer requested ca...	DH-0000532
5	tOHIsqqv OoKwokAX	5193221091	1/16/2023 6:27 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000466
6	TxeKQQlp DYscDHXy	5193221094	1/16/2023 7:04 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000467
7	VPafydyOX KYnVJBnw	5193221132	1/16/2023 8:11 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000468
8	steven Jacobs	5193221315	1/16/2023 10:15 PM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000469
9	fhqoFWna veamGdIR	5193221484	1/17/2023 3:19 AM	1/23/2023 3:28 AM	Transfer within Agency/...	DH-0000470

3. Click the **Delegation's History Name** link from the *Delegation History Name* column to display the *Delegation History* page.

Delegation History DH-0001994	
Enroller Contact Zuchini Dominic aa	Delegation Start Date 2/15/2023 10:22 AM
Consumer Contact Marcus Eufy	Delegation End Date 2/28/2023 9:17 AM
CalHEERS Case/Application ID 5193199718	Reason for End Transfer within Agency/Entity
Delegation History Name DH-0001994	

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