

## How to Reassign Clients

This User Guide is designed to assist in reassigning clients from one Agency to another. It pertains to both Individual and Small Business clients.

1. Log into your broker portal and click on the *My Profile* tab.

**AC0000050211 - Christa Smith**

State Unique ID: 2017EIT License: EIT2017 Certification: SI00140 [View](#) Expiration: 2019-03-29 Status: Approved

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**Manage Profile Information** collapse

<b>Personal Profile</b>	<b>Legal Residence</b>
First Name: <input type="text" value="Christa"/> *	Address Line 1: <input type="text" value="13 Mann Ave"/> *
Middle Name: <input type="text" value="Middle Name"/>	Address Line 2: <input type="text" value="Address Line 2"/>
Last Name: <input type="text" value="Smith"/> *	City: <input type="text" value="Rensselaer"/> *
Suffix: <input type="text" value="None"/>	Zip: <input type="text" value="12144"/> * State: <input type="text" value="NY"/>
<b>Contact Info</b>	<b>Mailing Address</b> <span>Same as residence</span> <input type="checkbox"/>
Email Address: <input type="text" value="christa.baynard@health.n"/>	Address Line 1: <input type="text" value="1 Albany"/> *
<small>To change Broker email address, please call Customer Service.</small>	Address Line 2: <input type="text" value="Address Line 2"/>
Primary Phone Number: <input type="text" value="518"/> <input type="text" value="555"/> <input type="text" value="4777"/> x <input type="text"/> <input type="text" value="Cell"/> *	City: <input type="text" value="Albany"/> *
<input type="text" value="518"/> <input type="text" value="555"/> <input type="text" value="2132"/> x <input type="text"/> <input type="text" value="Work"/> <input type="button" value="Add Another Number"/>	Zip: <input type="text" value="12144"/> * State: <input type="text" value="NY"/>
Preferred Phone Number: <input type="text" value="Work"/> *	<b>Business Address</b> <span>Same as residence</span> <input type="checkbox"/>
	Address Line 1: <input type="text" value="1 Albany"/> *
	Address Line 2: <input type="text" value="Address Line 2"/>
	City: <input type="text" value="Albany"/> *
	Zip: <input type="text" value="12144"/> * State: <input type="text" value="NY"/>

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<b>Account Preferences</b>	<b>Group Size</b>
<input type="checkbox"/> Hide Profile from Public Search	<input checked="" type="checkbox"/> Individual
<input type="checkbox"/> Send me Client Renewal Reminder Notice	<input checked="" type="checkbox"/> 2 - 10
	<input checked="" type="checkbox"/> 11 - 25
	<input checked="" type="checkbox"/> 25+

2. Scroll down to the bottom of the My Profile tab. Click the *Reassign Clients* link in the blue border.

**Agency Affiliation:**  
Enter Agency's License Number to add to your list.

Agency Name  Agency EIN (Tax ID)

My Agency Affiliations      EIN/Tax ID      License No.

SHOP	1234567	1234567	remove
testnew	1234569	test234	remove

**Can work Independently on the Marketplace**

Please confirm that the information above, related to your NY State of Health certification and service details is accurate. This information will be displayed when potential clients are searching for a Broker, Navigator or Certified Application Counselor.

[View/Edit Additional Contact](#)

**Save**

▸ **Reassign Clients** expand

3. Once the Reassign Clients tab is expanded, the Manage Profile Information section will collapse. To begin click on the *Move Clients from Agency* picklist and select the Agency that the business or individual is currently under. They may also be under "Direct Clients", unaffiliated with an Agency.

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▸ **Manage Profile Information** expand

▾ **Reassign Clients** collapse

Move clients from Agency...      To this Agency:

**Employers**

Select	Employer	Primary Contact
No Clients Found		

**Individuals**

Select	Name [Last] [First]	Mailing Address
No Clients Found		

- Once the Agency (or Direct Clients) is selected, all clients under that Agency will appear in the section below. The list will include both Employer and Individual clientele. Simply select the checkbox next to the client(s) that need to be moved.

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expand

▾ Reassign Clients
collapse

Move clients from Agency...

To this Agency:

testnew ▾

--Select-- ▾

**Employers**  Select All

Select	Employer	Primary Contact
<input type="checkbox"/>	Din Warehouse	Reynolds,Caroline
<input type="checkbox"/>	Little Black Dress	McDowell,Lisa
<input type="checkbox"/>	Line of Linen	Jerry,Bennen
<input type="checkbox"/>	Five Guys	Johnson,Christa

**Individuals**  Select All

Select	Name [Last] [First]	Mailing Address
<input type="checkbox"/>	Phalangee Regina	1 Central Perk ,New York,NY-10019;
<input type="checkbox"/>	Underwood Frank	250 Broadway ,New York,NY-10007;

5. Simply select the checkbox next to the client(s) that need to be moved.
- Click the *To This Agency* picklist and select the Agency (or Direct Clients) that the selected clients should now be affiliated with.
  - Click *Assign*.

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Move clients from Agency...  
testnew

To this Agency:  
SHOP

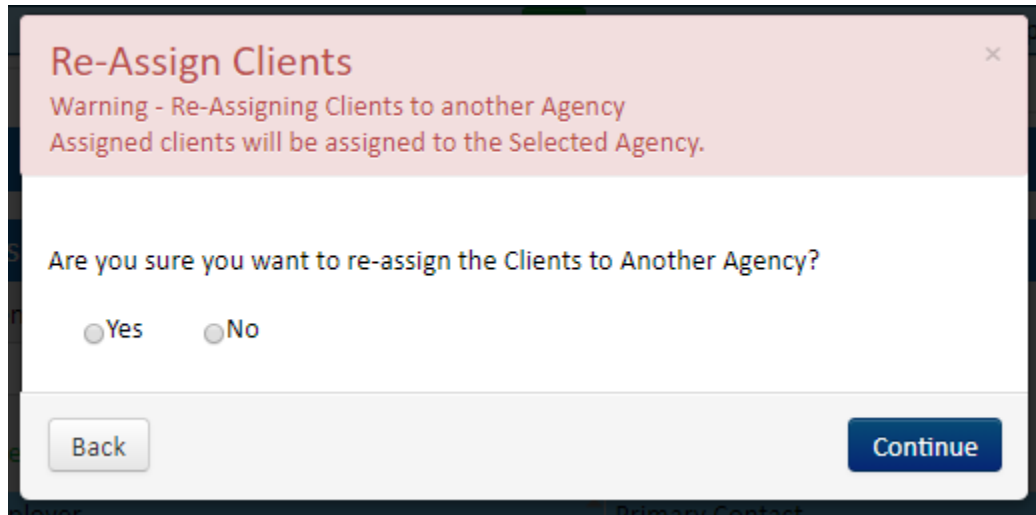
**Employers**  Select All

Select	Employer	Primary Contact
<input type="checkbox"/>	Din Warehouse	Reynolds,Caroline
<input type="checkbox"/>	Little Black Dress	McDowell,Lisa
<input checked="" type="checkbox"/>	Line of Linen	Jerry,Bennen
<input type="checkbox"/>	Five Guys	Johnson,Christa

**Individuals**  Select All

Select	Name [Last] [First]	Mailing Address
<input type="checkbox"/>	Phalangee Regina	1 Central Perk ,New York,NY-10019;
<input type="checkbox"/>	Underwood Frank	250 Broadway ,New York,NY-10007;

6. A pop-up will appear asking if you want to reassign the clients to another Agency. Select the *Yes* radio button and then click the *Continue* button.



Once the pop-up box closes, confirm the client(s) was moved by navigating to the My Clients tab and selecting the appropriate client type and Agency. The recently moved clients will now appear under the new Agency.