## 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.

ate Unique ID: 2017EI	License: EIT2017 Cert	fication: SI00140	Expiration: 20	19-03-29	Status: Appro	ved	
verview My Profile	My Clients My Inbo	x Documents	Address History	Useful Li	nks		
<ul> <li>Manage Profile</li> </ul>	e Information						collapse
Personal Profile			Legal Resider	nce			
First Name:	Christa	*	Address Line	e 1: 13 Ma	inn Ave		*
Middle Name:	Middle Name		Address Line	2: Addre	ess Line 2		
Last Name:	Smith	*	Ci	ity: Renss	elaer	*	
Suffix:	None •		Z	2ip: 1214	4 * State:	NY	
Contact Info			Mailing Addr	ess	Same as	residence	
Email Address	christa.bavnard@health.n		Address Line	e 1: 1 Alba	iny		*
To change Broker em	ail address, please call Custome	r Service	Address Line	2: Addre	ess Line 2		
Primary Phone	518 555 4777 <b>x</b>	Coll v *	Ci	ity: Alban	ý	*	
Number:	518 555 2132 x	Nork VO	Z	2ip: 1214	4 * State:	NY	
	Add A	nother Number	<b>Business Addre</b>	\$\$\$	Same as	residence	
Preferred Phone Number:	Work •		Address Line	• 1: 1 Alba	iny		*
			Address Line	2: Addre	ess Line 2		
			Ci	ity: Alban	y	*	
			Z	zip: 1214	4 * State:	NY	
Account Preference	es		Group Size				
			aladividual a 2	10	G 11 0E	GR 25.	

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

Agency Annation:					Additional Contact Information Optional
Enter Agency's License Number to add to your list.					You can give us a secondary contact who can do
Agency Name	Agency EIN (Tax	(ID) 🥹			business on your behalf through NY State of Health Customer Service Center. You can also
					skip this section or come back to it later.
My Agency Affiliations		EIN/Tax ID	License No.		View/Edit Additional Contact
SHOP	10	1234567	1234567{	remove	
testnew	2	1234569	test234	remove	
Can work Independer Please confirm that t	ently on the Mark he information al	etplace pove, related	to your NY S	ate of Health	certification and service details is accurate. This
information will be d	isplayed when po	tential client	is are searchin	іў јог а вгоке	r, Navigator or Certified Application Counselor.

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.

AC0000050211 - Christa Smith							
State Unique ID: 2	2017EIT License: EIT20	017 Certifica	rtion: SI00140 Vie	Expiration: 20	19-03-29	Status: Approved	
Overview My	Profile My Clients	My Inbox	Documents	Address History	Useful	Links	
Manage Profile Information							expand
• Reassign (	Clients						collapse
Move clients fro Select Employers	om Agency	•	To this Agend	:у:	¥		
Select	Employer			🗘 Primary Conta	ct		÷
No Clients Found	1						
Individuals							
Select	Name [Last] [First]			🗘 Mailing Addres	55		÷
No Clients Found	ł						
						Cancel	Assign

4. 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.

AC0000050211 - Christa Smith							
State Unique ID: 201	7EIT License: EIT2017 Certifica	tion: SI00140 View	Expiration: 2019-03-29	Status: Approved			
Overview My Pro	ofile My Clients My Inbox	Documents A	ddress History Useful L	inks			
• Manage Pro	ofile Information			expand			
Move clients from	Agency						
testnew	•	Select	•				
<b>F</b> aulture (							
Employers							
Select	Employer		Primary Contact	÷			
	Din Warehouse		Reynolds,Caroline				
	Little Black Dress		McDowell,Lisa				
	Line of Linen		Jerry,Bennen				
	Five Guys		Johnson, Christa				
Individuals 0	Select All						
Select	Name [Last] [First]	4	Mailing Address	÷			
	Phalangee Regina		1 Central Perk ,New York,	,NY-10019;			
	Underwood Frank		250 Broadway ,New York	,NY-10007;			
				Cancel Assign			

- 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.

AC0000050211 - Christa Smith						
State Unique ID: 20	17EIT License: EIT20	017 Certificat	tion: SI00140 Vie	Expiration: 20	19-03-29 Status: Approved	
Overview My Pr	ofile My Clients	My Inbox	Documents	Address History	Useful Links	
• Manage Pro	ofile Information					expand
- D' Cl						
<ul> <li>Reassign Ci</li> </ul>	ients					collapse
Move clients from	n Agency		To this Agence	γ:		
testnew	testnew			SHOP		
Employees						
Employers						
Select	Employer			🗘 Primary Conta	ct	¢
	Din Warehouse			Reynolds,Caro	line	
	Little Black Dress			McDowell,Lisa		
	✓ Line of Linen			Jerry,Bennen		
E Five Guys			Johnson,Christa			
	-					
Individuals	Select All					
Select	Name [Last] [First]			Calify Address	55	\$
	Phalangee Regina			1 Central Perk	,New York,NY-10019;	
	Underwood Frank			250 Broadway	,New York,NY-10007;	
	_				Cancel	Assign

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.

Re-Assign Clients Warning - Re-Assigning Clients to another Agency Assigned clients will be assigned to the Selected Agency.						
Are you sure you want to re-assign the Clients to Another Agency	?					
Back	Continue					

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.