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

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.
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.
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.
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.