

# Employer Services Portal Quick Guide

## How to transfer a subscriber (member) and family

1. Click on eligibility on the left navigation menu.
2. Search for the subscriber on the subscriber search tab by name or ID.
3. Select the active subscriber from the results table.
4. The subscriber overview page will open.
5. Select the transfer button just below the subscriber's contact information. *(Image 1)*
6. The transfer window will open. *(Image 2)*
7. Confirm or select new client to transfer to.
8. Select sub-client from drop down menu.
9. Select effective date.
10. If the subscriber has had dependents on record, the names will display.
  - a. Select the family members that are to be transferred with the same effective date.
  - b. The subscriber will already be selected.
  - c. Any dependents not selected for transfer will be set to an Inactive status.
11. Select submit.
12. Click cancel to return to the subscriber overview without transferring.
13. Upon submit, you will be returned to the eligibility search screen.
14. Search for the intended subscriber on the subscriber search tab by name or ID.
15. The subscriber and selected dependents will now display in inactive status in the old client/sub-client and active status in the new client/sub-client. *(Image 3)*

