A DELTA DENTAL[®]

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*)

Subscriber Information	History	Replaceme	nt ID Card				
Subscriber C	Overviev	N					
Plan Information							
Client-Sub-client DEMO01 - 0000				Eligibility Status		Eligibility Status Reason Reinstatement	
Coverage Type Subscriber, Spouse, Children				Effective Date 08/03/2020			
Subscriber Information							
Subscriber Name New Subscriber		Subscriber ID XXX-XX-55	•		Birth Date 01/05/1992		G
Contact Information							
Address 123 Main Street St Paul, MN 55106				Work Phone N/A		Cell Phone N/A	
>\$ Transfer - Te	m						



