

ACA Carriers - Transfer Instructions

Carrier	Transfer Terms & Requirements		Transfer Process / Paperwork	Notes / Links	PPI Contact
	If the agent...	Then the agent must...			
Ambetter	Is appointed direct to Ambetter	Email Michael.M.Mulkerin@centene.com and request that their appointment be transferred to Peek. Copy jennyb@ppisales.info on the email	Mike sends agent a link to recontract Broker Services 1-855-700-7985, Option 2	When Ambetter sends the transfer link, they terminate the old appointment, so the agent will not want to write business during this gap while recontracting. If transferring directly from Ambetter, the agent will still be able to see their book once they complete the new contract and checks for their previous book of business will be paid directly to them by Ambetter Blackout Period for transfers of September 1 through January 31.	jennyb@ppisales.info
	Appointed under another FMO	Needs to get a signed, written release from their current upline, and then needs to email Michael.M. Mulkerin@centene.com and request that their appointment be transferred to Peek. Copy jennyb@ppisales.info on the email	Mike sends agent a link to recontract Broker Services 1-855-700-7985, Option 2	When Ambetter sends the transfer link, they terminate the old appointment, so the agent will not want to write business during this gap while recontracting. If transferring from another agency, they will not be able to see any of their current book of business when they recontract as that stays with the previous agency (and they would still be paid by their previous agency for that business). Agent needs to confirm with current FMO before transferring that they will continue paying them their commissions at the current rate as these will not transfer over. They will want to download a file of their book of business before the transfer process is started	
Anthem ACA	Is appointed	Call Peek Performance (Terri) and the process will be explained		If you need help along the way, contact Licensing and Credentialing at 1-877-304-6470 (9:00 AM - 4:30 PM ET)	terris@ppisales.info
BCBS of IL BCBS of MT BCBS of NM BCBS of OK	Is appointed	Request a termination of their current Producer appointment directly from the carrier, and request to be resent a contracting link as a "Subproducer" of Association Concepts, LLC dba Agility Insurance Services. In the same email or conversation, they would need to agree to transfer their own BOB under Agility. <i>Before they start the process, they should request the agency they are under to "release" their production.</i> If their current upline will not release the production, they need to confirm with current FMO before transferring that they will continue paying them their commissions at the current rate as these will not transfer over. They will want to download a file of their book of business before the transfer process is started.	Contact the carrier directly and request termination: call 855-782-4272 or send an email to Producer_Service_Center@hcsc.net. Make sure to request that their BOB be transferred (if the FMO has released the production). Once current number is terminated, agent will complete a new contract to be set up as a Sub-Producer under Agility/Association Concepts.	Copy sarahm@ppisales.info on all communication with the carrier.	sarahm@ppisales.info
BCBS of SC	Is appointed	All transfers can be processed without a release.	Complete "Transfer" request in SuranceBay	SuranceBay link	terryb@ppisales.info

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BCBS TN	Is appointed	No release required for transfer: If an agent was previously appointed and sends in new paperwork, they issue a new # going forward. That does not affect the old # or the old book of business. It remains where it always was and paying the same way. If agent gets a release, the agent and book of business can move over	Complete contract in eSignGenie	Broker Support # 1-800-351-9325 Agents&Brokers@bcbst.com- to ask questions about licensing or address changes Individual_Sales@bcbst.com- to send Blue Elite applications and change applications	Danielleb@ppisales.info
BCBS of TX	Is appointed as a "Direct Pay" Producer (paid directly by BCBS of TX)	Request a transfer by completing the affiliation change request to change their GA to Agility / Association Concepts. NOTE: This will move both their Under 65 (ACA) and Over 65 (MA) business. No release is required.	Email sarahm@ppisales.info to request the affiliation change request link.	Transfer period is closed until June/July 2022.	sarahm@ppisales.info
	Is appointed as a "Sub-Producer" and paid by another FMO	Request a termination of their current Producer appointment directly from the carrier, and request to be resent a contracting link as a "Subproducer" of Association Concepts, LLC dba Agility Insurance Services. In the same email or conversation, they would need to agree to transfer their own BOB under Agility. <i>Before they start the process, they should request the agency they are under to "release" their production.</i> If their current upline will not release the production, they need to confirm with current FMO before transferring that they will continue paying them their commissions at the current rate as these will not transfer over. They will want to download a file of their book of business before the transfer process is started.	Contact the carrier directly and request termination: call 855-782-4272 or send an email to Producer_Service_Center@hcsc.net. Make sure to request that their BOB be transferred (if the FMO has released the production). Once current number is terminated, agent will complete a new contract to be set up as a Sub-Producer under Agility/Association Concepts.		
Bright Health ACA	Is appointed	Request a release from current FMO and email to danielleb@ppisales.info		Broker Support # 888-325-1747	danielleb@ppisales.info
	Appointed Direct	Email brokers@brighthouseplans.com requesting to be added to Peek Performance Upline. Important to include your NPN in the email.			
CareSource	Is appointed	Effective June 1, 2021, agents/agencies will have two options to move; A) obtain an immediate release signed by the FMO or B) submit an intent to transfer notification, wait 90 calendar days then move to the new organization. Option B allows the agent to continue writing business during the waiting period. With either option, the agent's book of business will remain with the hierarchy in place at the time of sale. Also, to minimize disruption during the onboarding season, no moves or intent to transfer requests will be honored from September 1 – December 31. Exceptions to this will not be considered.	Get signed immediate release or complete intent to transfer form Agent support/sales operations: (833)230-2002	Transfers closed Sept 1-Dec 31st. Any intent to transfer forms submitted after June 1st will go into effect January 2022	jennyb@ppisales.info

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Christus	Appointed under another FMO	Obtain a letter for release from current FMO and send to Robynd@ppisales.info for CHRISTUS stating you would like to align with Agility Insurance Services. This will allow you to join Peek's hierarchy. Then upload a copy of the letter to There is a section in the contracting link, where agents can upload the release. If the current FMO refuses to release the Agent, CHRISTUS will honor the refusal for a period of one (1) year from the Agent's request to change. At the end of the one-year period, CHRISTUS will process the change without a release letter. When an Agent moves from the FMO to another FMO, the Agent's book of business, including commissions, will follow the Agent. Any compensation due will be paid solely		Can call 833-889-4357 or email healthplanbrokercontracting@christushealth.org to find upline	Robynd@ppisales.info
Cigna ACA	Is appointed direct to Cigna	need to complete a new onboarding invitation to be appointed as an agency producer for Peek Performance	Cigna send a new onboarding link	If an agent is unsure of prior agency writing number- they can call 1-877-244-6215 option 3.	kimw@ppisales.info
	Appointed under another FMO	Complete the Acknowledgement of Contractual Obligations form	Complete the Acknowledgement of Contractual Obligations form		
Friday Health	Is appointed	Agent must contact Friday Health at brokers@fridayhealthplans.com or 844-270-7075 and advise you want to be aligned with Association Concepts, LLC dba Agility Insurance Services.			kimw@ppisales.info
Molina ACA	Has written business in last 6 months	Either get the Agency release form signed by current upline and complete Producer Application, or the agent can do a Delayed Release in which the transfer is delayed 6 months after Molina receives the needed documents (Delayed Release form signed and Producer Application completed)	*Regular transfer - have agency letter of release, Producer application * Delayed Release - delayed release form and Producer application Broker Support: 1-855-885-3179	Transfers closed Oct 1st -Dec 15th	jennyb@ppisales.info
	Has not written business in last 6 months	Regular Constructive Release - Constructive release form must be completed along with Transfer Producer Application.	* Constructive release - constructive release form and Producer application Broker Support: 1-855-885-3179		
Oscar	Is Appointed direct to Oscar	Contact Oscar to request a transfer: centralam@hioscar.com. They must request that Agility Insurance Services be set up as their GA in order to be in Peek's hierarchy.	Send email to centralam@hioscar.com Broker Support:1 (855) 672-2713	Transfers closed Oct 16th - August 1st If an agent is transferring from another GA, when they request the GA change from August 1 through October 16, the effective change date will be for 1/1/22. The book of business will move to the new GA	jennyb@ppisales.info
	Appointed direct to another FMO	Get Oscar release form signed by current upline. Contact Oscar to request a transfer: centralam@hioscar.com. They must request that Agility Insurance Services be set up as their GA in order to be in Peek's hierarchy.	Get letter of release and send email to centralam@hioscar.com Broker Support:1 (855) 672-2713		

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Priority Health	Is appointed	Complete a transfer invitation sent from noreply@mail.hellosign.com	The transfer process can take up to 30 days. The Book of Business will only transfer if the current upline releases it. Overrides on all existing business will continue to pay up the old up line and new business would go to the new upline. The agent can write while the transfer is in process, but the business will be placed with the old upline and paid accordingly, until the transfer is completed.		danielleb@ppisales.info