CEJA Transfer Requests Quick Start Guide

Request Transfer – if Inquiry or Applicant (CW to WH)

1. Inquiry Request from grantee to grantee
    a. Select Add Customer and add in the customer's information.
    b. In the window prompt that opens, check the box to "Notify existing provider that the customer is requesting to enroll with my organization."
        i. **Note**: The organization the customer record is tied to is at the top of this window.
    c. Select from the Navigator or Provider dropdown and select your organization.
    d. Enter text into the "Reason for Request" text box.
    e. Click the "Save" button to submit the transfer request.
2. Next Steps:
    a. The grantee with that customer record will receive an email and will also be expected to check the dashboard on a regular basis for any open transfer requests.
    b. That grantee may either accept or reject the transfer request.
    c. You will then receive an email confirming the acceptance or rejection of the transfer request.
    d. **Note**: If you have submitted a transfer request, but have not heard back in some time, please follow-up with your regional administrator.

Transfer customer to another Navigator/Provider

1. Select Customer name
2. Select Intake tab
3. Scroll to section titled "4. Customer Status"
4. Check the box for "Transfer customer to a different navigator/grantee"
5. Select Program (Climate Works, Workforce Hubs, Returning Resident, or Refer to Navgiator)
6. Select a Grantee/Organization
7. Enter into the textbox "Reason for Request"
8. Select "Submit Transfer" button
9. This will send an email to the grantee/navigator and will appear in their dashboard report in the row for "Respond to Transfer Requests"
10. Once the response been made you will receive an email confirming the acceptance or rejection of the request
    a. **Note**: If you have submitted a transfer request, but have not heard back in some time, please follow-up with your regional administrator.

Responding to Transfer Requests

1. To respond to transfer requests you may either open the link in the email for the customer in question or you can access the dashboard by:
    a. Logging into CEJA
    b. Selecting the Dashboards dropdown and selecting CEJA
    c. Filter the dashboard report accordingly

d. Select the hyperlinked number in the first row in the report “Respond to Transfer Requests”
e. This will open a new tab of your customer list with any transfer requests that need a response

2. How to respond to transfer requests:
    a. If customer is Inquiry
        i. Select customer name
        ii. The prescreening window will open
        iii. Select the button “Respond to Request”
        iv. Select “Accept” or “Reject”
    b. If customer has a status that is not Inquiry
        i. Select customer name
        ii. Select Intake tab
        iii. Select the button “Respond to Request”
        iv. Select “Accept” or “Reject”