

A large, dark blue, curved graphic element is positioned in the top left corner of the slide, resembling a thick, stylized arc or a partial circle.

# Broker Workgroup

November 13, 2020

# Meeting Agenda

1. Preliminary Matters
2. Pennie Overview & Updates
3. Broker Login & Resources
4. Questions for Pennie



# **Pennie Overview & Updates**



# Who we are and what we do

**Goal:** Improve the accessibility and affordability of individual market health coverage for Pennsylvanians

## Who we are

- The official health insurance marketplace for Pennsylvania
- The home for high-quality, affordable health insurance plans
- The only source for financial assistance to reduce the cost of coverage and care

## Who we help

- Customers transitioning from Healthcare.gov
- Individuals and families without access to employer-sponsored coverage
- The uninsured
- Operate a “*no wrong door*” policy to ensure those deemed Medicaid-eligible access coverage

## How we help

- Customer Service Team
- Online self-service
- Direct outreach & education
- In-person assistance through Navigators/Assisters and Brokers

# Why Pennsylvania decided to transition

## Benefits of a state-based marketplace:

- **Flexibility** to react to changes and **serve residents in the way that's best for them**
- **Local control** of a robust in-person assistance program, education, communications and customer service
- **Decreased operational costs and an ability to keep dollars in-state**
- **Increased premium savings** (reduction of approx. 3-5%) in the individual insurance market through the implementation of a reinsurance program
- Ability to work more closely with insurers and **foster a competitive marketplace**
- **Better oversight and management** of the Medicaid churn population, some of PA's most vulnerable

# Upcoming Producer Milestones

- **11/30:** Last day to complete training for Pre-Registered or Pre-OE registered **FFM producers**
- **12/15:** Last day for customers to shop for coverage effective 1/1/2021
- **1/15:** Last day for customers to shop for coverage effective 2/1/2021

# Agency Updates

What's new since we met last?

## Pennie is Live!

- Open Enrollment is here. November 1 – January 15, 2021
- Pennie.com - 1-844-844-8040 (customer line)

## OE Toolkit is live

- Print collateral, one-click social posts, manuals, brand guide, Spanish materials, videos, graphics, etc.

## Technology Platform

- Consistently monitoring technical issues with help of customer, broker, assister, and insurer feedback.

## Call Center

- Over 200 CSRs
- OEP hours: M-F 8a-7p, Sat 8a-1p, Closed Sunday
- Dedicated Broker/Assister line: 1-844-844-4440

## Other Stakeholders

- Sent OE Toolkit to a vast number of stakeholders & leveraging other state agency channels.

## Brand Development & Marketing

- Pennie.com is now available in Spanish, Mandarin, and Russian
- OEP Campaign starting on Monday



# Update on Open Enrollment Toolkit





# Open Enrollment Toolkit

<https://agency.pennie.com/oetoolkit/>

## Open Enrollment Toolkit



Get the materials you need when you need them.  
All in one convenient location.



# Open Enrollment Toolkit

- General Materials
  - Flyer and Posters
  - Guides
  - Logos
  - Videos
  - Talking Points/Sample content
  - Spanish Collateral
- Digital Materials
  - E-Newsletter Blurbs
  - Logos
  - Educational Videos (English and Spanish)
  - Social Media Text
- Broker/Assister Specific Materials
  - Guides/Manuals

# Social Press Kit

## Pennie's Social Media Kit

**CAMPAIGN**

### Open Enrollment Toolkit

**DESCRIPTION**

Easily share our Open Enrollment resources! D


**TIMELINE**

Nov 1st - Jan 15th

**HASHTAGS**

#PennieGetsYouCovered | #PenniePA |  
 #PennieProud | #HealthInsurance |  
 #InsuranceMarketplace | #IndividualMarket

**FACEBOOK POSTS**




**Pennie - I**

Welcome to Pennie, the health insurance marketplace for Pennsylvanians. Explore health coverage plans and find the right one for your needs. Healthcare for you.

**SPECIFIC TIME / DURATION**

Nov 1st - Jan 15th


**f Post to timeline**



**Pennie - 2**

Welcome to Pennie, the health insurance marketplace for Pennsylvanians. Explore health coverage plans and find the right one for your needs. Healthcare for you.

**f Post to timeline**




**Pennie - 3**

Did you know December 15, 2020 will be the last day to purchase your health coverage for January 2021 through Pennie? You will still be able to purchase health coverage for February 2021 and beyond up until January 15, 2021.

**f Post to timeline**


**TWEETS**



**Pennie I**

Pennie is Pennsylvania's new, self-sustaining health insurance marketplace and the home for high-quality, affordable health insurance plans. Visit pennie.com.

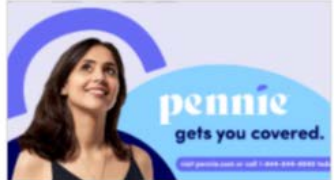
**Twitter Tweet**



**Pennie 2**

Pennie's mission is to help Pennsylvanians access the health insurance needed to live a healthy life. Open enrollment will run from Nov. 1, 2020 to Jan. 15, 2021. Visit pennie.com for more info.

**Twitter Tweet**

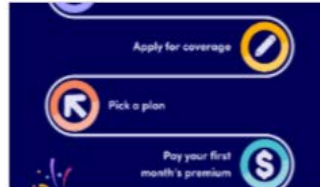


**Pennie 3**

Now through January 15, 2021, Pennsylvanians can shop and compare health coverage plans with Pennie. Learn more at pennie.com.

**Twitter Tweet**


**FACEBOOK POSTS**



**Pennie - Infographic 1**

Follow the Pennie Path to Coverage!

**f Post to timeline**



**Pennie - Infographic 2**

With Pennie, the path to coverage is simple - with lots of help along the way!

**f Post to timeline**

# Important Reminders

- **YOU MUST CREATE AND USE YOUR OWN ACCOUNT ON PENNIE.**
  - Brokers cannot use another broker's account as your own, even if it's an agency manager or principal.
  - Accounts used by multiple brokers will be locked for all users.
- **ONLY CUSTOMERS CAN DESIGNATE YOU AS THEIR BROKER, a broker cannot add themselves to a customer's account.**
  - Once a customer designates you as their broker, you will receive an alert under 'Pending Individuals' in your account, where you can accept the customer's business.
  - There are two ways a customer can designate their broker if they do not have a current designation:
    - Designate through the *Find Local Assistance* function on the Pennie platform
    - Call the customer call center and request that a broker be designated for them
- **BROKERS SHOULD MAKE SURE THEY HAVE FULLY READ THE PENNIE ENTITY AGREEMENT AND ARE PRACTICING ALL STATED REQUIREMENTS WITHIN.**
- **Brokers should not create a new account for customers who have migrated from healthcare.Gov.**
  - Migrated customers should have received an access code and should use that access code to ensure they claim the right account.
  - Customers who have not received their access code should reach out to the Pennie call center.

# Important Reminders

- **Agency managers must add agents within their agency through their agency manager account.**
  - Click the 'add agent' tab in the agency manager account and complete all required fields.
  - Agents will receive an email with instructions on how to claim their account.
  - A new agent account will remain with a pending status until Pennie has verified all certification requirements have been met.
- **During the data migration process (run in September) Pennie worked to ensure that all broker designations migrated from healthcare.gov to the Pennie platform. However, not all customers kept their broker designation.**
  - Pennie prepared for this and included instructions for customers to re-designate their broker in their new Pennie account through the noticing process.
  - Customers enrolling on healthcare.gov through a SEP post September *will not* be migrated over to Pennie. Healthcare.gov will be sending these individuals over to Pennie, and Pennie will be conducting outreach to this population to ensure they understand how to get enrolled in 2021 coverage.
  - They will be able to designate a broker when they create their Pennie application.

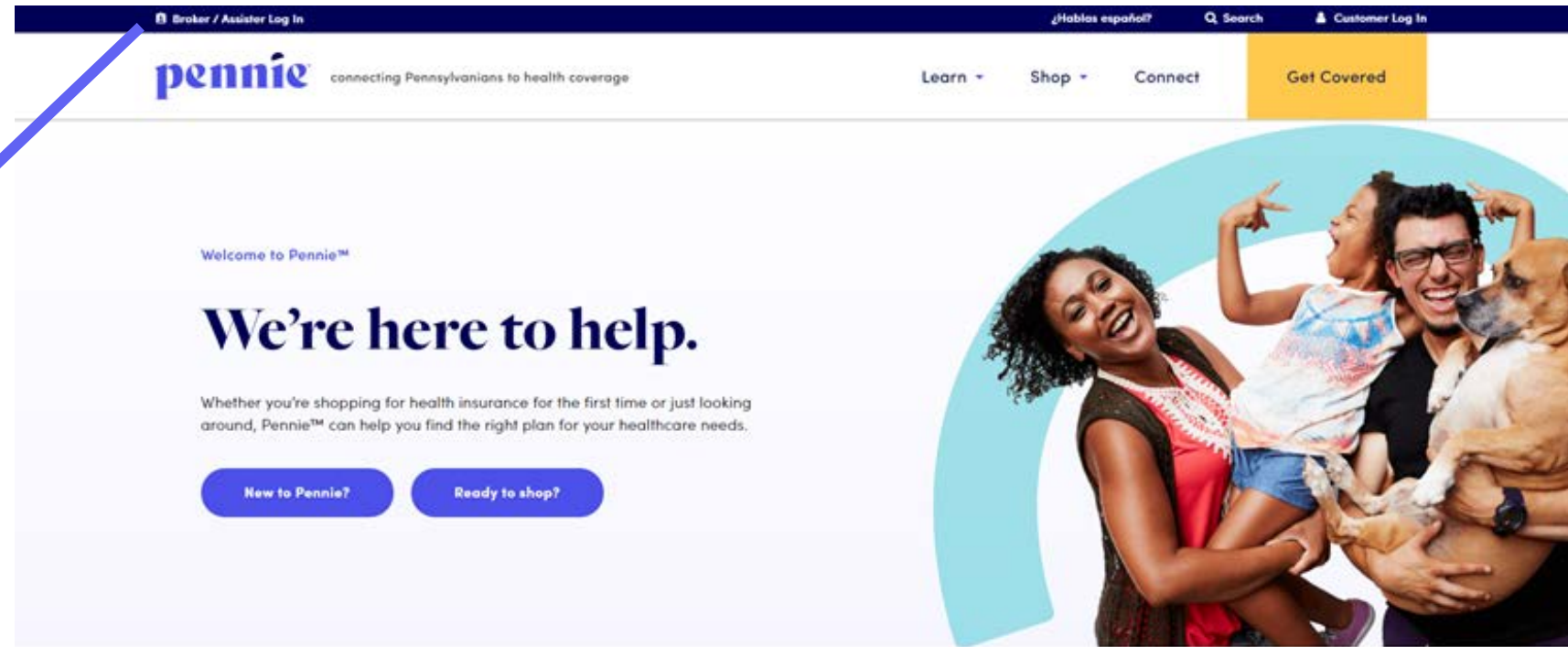


# Broker Login & Resources





# Broker Login



 Broker / Assister Log In

**pennie** connecting Pennsylvanians to health coverage

# Already have an account?

## Broker/Assister Account Login

Do you already have a Pennie account? \*

Yes

Submit

## Log In

Email Address

Password

☐ Remember Me

Log In

[Forgot password?](#)



# Setting Up Your Broker Account

## Broker/Assister Account Login

Do you already have a Pennie account? \*

No

I need to create an account and: \*

I am a Broker with an Agency

Submit



# Setting Up Your Broker Account

- If you are a member of an agency, you will see this page

I am a member of an agency...what now?

If you are a member of an agency, your account will need to be created by your Agency Manager (sometimes referred to as the Principal):

Contact your Agency Manager to add yourself to the agency account

Once added to the account, an email notification will be sent to you with a secure link to log in and claim your account under your agency

If your agency is not already set up in Pennie, an Agency Manager will need to be established in order for you and other brokers to be set up within the agency.

# Setting Up Your Agency Manager Account

## Broker/Assister Account Login

Do you already have a Pennie account? \*

No

I need to create an account and: \*

I am an Agency Manager or Principal

Submit



# Setting Up Your Agency Manager Account

Once selected, you will receive this alert

If you are an independent broker or the first broker in your agency to sign up on Pennie, then you will create the agency and your own broker information. Visit the [Broker page](#) to view manuals to create your account.

Click [here](#) to create your account.



# Create your Agency Manager Account

Once selected, you will be taken here

## New Agency Manager Account Set-Up

All fields on this form marked with an asterisk (\*) are required.

### Basic Information

First Name \*

Last Name \*

Email Address \*

Confirm Email Address \*

Phone Number \* ?

### Security Question

Security Question \*

Select

### Set Password

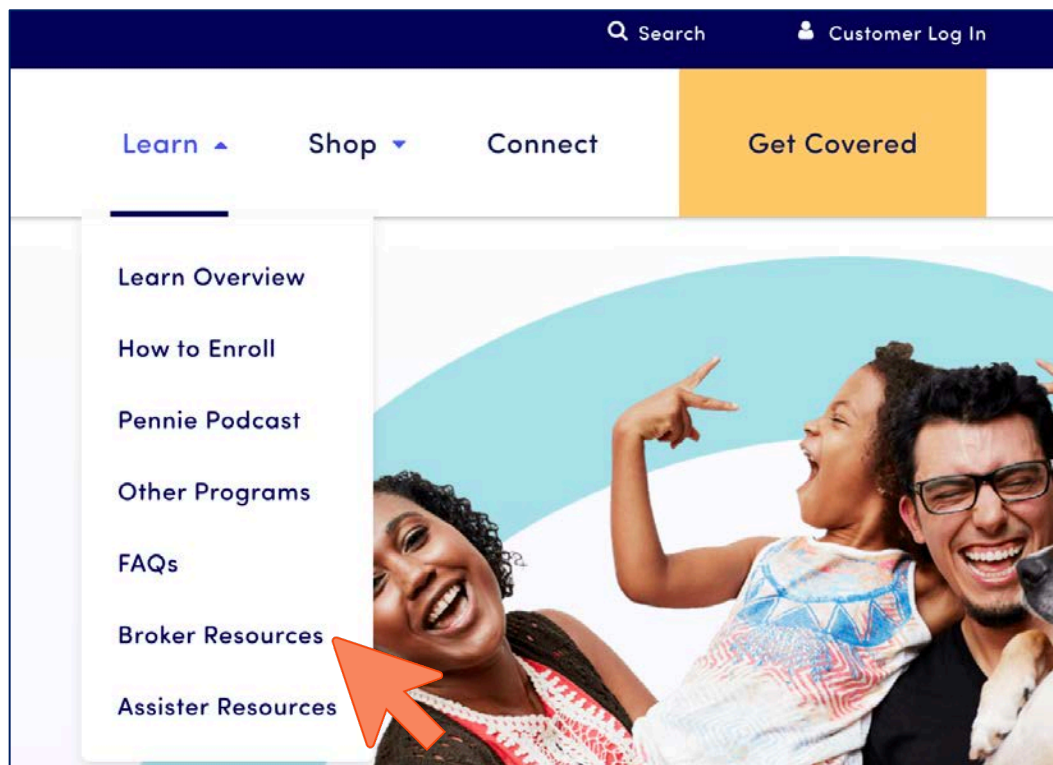
Password \*

Confirm Password \*

# How to Access Broker Resources

If you are an independent broker or the first broker in your agency to sign up on Pennie, then you will create the agency and your own broker information. Visit the [Broker page](#) to view manuals to create your account.

Click [here](#) to create your account.



## Resources

[Current Healthcare.gov Members](#)

[Individuals & Families](#)

[About Pennie](#)

[Careers](#)

[Newsroom](#)

[Broker Resources](#)

[Assister Resources](#)

[Other Resources](#)

# Broker Resources Page



## Get Certified

Brokers are vital to the entire Pennie ecosystem designed to provide a space for health insurance accessibility. If you would like to become a Pennie-certified broker, [click here](#).



## Create An Account

Click [here](#) for instructions on how to create your account.



## Get Help

[Broker FAQ's](#)

[Broker Resources](#)

Call 1-844-844-4440

### 1 Marketing Collaterals

[Request Printed Materials](#)

2021 Open Enrollment Toolkit that includes:

Social Media Materials

Pennie Logos

Downloadable Flyers and Posters

Pennie-Certified Broker Graphics

Educational Videos

Materials en Español

### 2 Manuals

[Broker User Guide](#)

[Broker Account Claiming Guide](#)

[Agency Account Claiming Guide](#)

### 3 Broker Workgroup

With meetings held on the second Friday of the month, Pennie provides the certification, training, and assistance for brokers to sell on the Pennsylvania marketplace.

[Join the Workgroup](#)

# pennie

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