

Assister & Entity/Entity Manager Account Creation Guide

Overview

Pennie uses a modern and proven technology platform trusted by State-based Marketplaces across the country. While the platform offers customers tools to apply, shop, compare, and enroll in comprehensive health and dental coverage, there are also tools available specifically designed to aid Assisters in serving and managing their customers.

This guide will review the steps needed to create both an **Assister account**, and an **Entity and Entity Manager account**.



Jump to:

Which account type is right for you?

If you oversee multiple Assisters that all work for the same organization, you will want to register as an **Entity Manager**. In the process of creating your account, you will also create an **Entity** account for the organization. Through the additional features of the Entity Manager and Entity accounts, you can manage the Assisters of the organization and collaborate on behalf of their customers.

ASSISTERS DELEGATIONS A ASSISTERS 2 Matching Assisters	ICCOUNT -				Add Assister	
Refine Results By (reset all) Assisters' First Name Assisters' Last Name	Name © Cory Logan Steve Yeager	Number Of Clients ≎ 3 2	Certification renewal for Assister © 08/31/2021 08/31/2021	STATUS ¢ Active Active	CERTIFICATION STATUS ÷ Certified Certified	
Customer 1 Custo	Customer 2		Customer 4		Customer 5	

What tools are inside the Entity Manager Portal?

Those with an Entity Manager account can:

- 1. Easily add Assisters to your organization
- 2. Accept pending customer delegations
- 3. Easily assign or re-assign customers to other Assisters when necessary, *and*
- 4. View and export the Book of Service for a single Assister, or the entire Entity
- \rightarrow <u>Note</u>: Customers are notified of any changes



What tools are inside the Assister Portal?

What can you do with the Pennie Assister Portal?

- 1. Accept new customers / remove customers from your own Book of Service
- 2. Manage current customers and see their current application status
- 3. Manage current customers' Data Matching Inconsistencies (DMI) and other tickets
- 4. Process an application on your customer's behalf, and
- 5. Manage your Assister profile information



Claiming Your Assister Account

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Assister Account Creation



The Entity Manager assigned to the Entity account is responsible for initiating the creation of a new Assister account.



To add an Assister to your organization *who does not currently* have a Pennie account, the Entity Manager simply selects the *Add Assister* button from the Dashboard of their Entity account.

The Entity Manager prefills some of the account information before submitting, which will trigger a link to be sent to the Assister at the email address used to create the account, requesting that they claim the account.



Upon claiming your account, you will verify the information that the Entity Manager prefilled before finishing the set up of the account by adding some additional information and selecting your preferences:



An important component to your Pennie Assister profile is your professional education and language capabilities. This is what customers will see when searching for an Assister:

> Customers will be able to better choose as Assister to help them when if they know you are able to speak any additional languages

Profile Information	
Spoken Languages Supported (Select all that apply) *	Arabic Arabic Arabic Arabic Arabic Arabic Arabic Cantonese Braglish Farsi Hmong Korean Arabic Russian
	Spanish Gagolog Vietnamese Other Select Some Options
Written Languages Supported (Select all that apply) *	Arabic Armenian Cambodian English Farsi Hmong
	Korean Russian Spanish Tagalog Traditional Chinese character
Education *	Vietnamese Other Select Some Options
Upload Photo	Choose File No file chosen File size limit is 5 MB.
	Save

Once you have completed your Assister account, a system notification will inform you of the Pennie review and approval process. At his point, you must inform your organization's Entity Manager. To trigger the update of your Certification Status, the Entity Manager must change your account Status from Inactive to Active:



In order to become Pennie-certified, all Assisters must:

- 1. Be licensed by the PA Insurance Department, and
- 2. Complete Pennie's Assister Certification Training

For a guide on how to register with the PA Insurance Department, please see our <u>PID Registration Guide for</u> <u>Pennie Assisters | Pennie</u>.

For a guide on how to claim and maintain your Assister account, please our <u>Claiming Your Pennie Account</u> <u>Guide | Pennie</u>.

A video walkthrough of how to claim an Assister account along with an overview of the account Dashboard can be found on Pennie's YouTube page: <u>Claiming an Assister Account & Overview of Assister Dashboard |</u> <u>YouTube – PenniePA</u>.



Creating Your Entity & Entity Manager Accounts



An organization can easily create a business profile in Pennie that will help them manage their Book of Service, assign Assisters, transfer customers, and much more. To get started, follow the path below:



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For simplicity, Pennie combines the creation of the Entity account with the creation of an Entity Manager account. A primary Entity Manager may be the organization's owner, a designate, or another individual with the responsibility of managing their organization's Pennie account and activity.

All fields on this fo	rm marked with an ext	
Basic Informati	on	
Fi	irst Name	
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La	st Name •	
Email	Address •	
Confirm Email A	Address •	
Phone Num	ber * 🛛	
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Security Que	stion • Select	
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Set Password		
Passwe	prd •	
Confirm D		
Prove You're Not a Date	• ·	
	pot	
Security Cod	e:•	
	I'm not a robot	
	 Constant of Meeting 	
	I have read and agree to the Privacy Policy	
	Cancel Submit	

At this stage of the Entity account creation ensure that all organizational information accurate and current:

> The information how customer public Pen

reation, please	Steps	Step 1: Entity Information			
	1. Entity Information	Entity Type •	 In-Person Assistance Certified Navigator Entities Certified Application Counselor 		
	2. Populations Served				
	3. Locations and Hours	F (2) N			
	A Contact Information	Entity Name •	Entity Name		
ation entered here is omers will see your c Pennie profile		Business Name (Legal) *	Business Legal Name		
	5. Assisters	Primary Email Address •	company@email.com		
	6. Document Upload	Primary Phone Number	xxx		
	7. Payment Information	Secondary Phone Number	XXX XXX XXXX		
		How would you like for us to contact you?	Email Phone Fax		
Method you prefe	er	Fax			
customers to commu	nicate	Federal Tax ID •			
with you		State Tax ID •	xxxxxxxxxxx		
		Organization Type *	Select 🗸		
		Counties Served *	Select Some Options		

An important component to your Pennie Entity profile is an accurate portrayal of your organization's product expertise, the diversity of your Assister pool, and the types of customers you most frequently serve:



Continue through the ensuring that all orga accurately:	e rest of the Ent nizational infor	ity account cre mation is ente	eation, ered	Steps ✓ Entity Information ✓ Populations Served	Step 3: Locations and Hours Please list all locations and busine Primary Site Location *	es hours for your organization te Name	<u>,</u>	1
		Steps.	Step 4: Contact Information Tell us about the contact people in your of Primary Contact Name +	Lecations and Hours organization.		xxx xxxx xxx xxxx ect v To S ect To S	olact v alact v	
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Once your Pennie Entity profile has been created, a system notification will inform you of the Pennie review and approval process:



Tips for Using Your Pennie Portal

Only work on one customer at a time.

Never have the Pennie Platform open in more than one web browser tab at a time.

Do not use the back button while navigating through the Pennie Platform; using the back button and/or multiple tabs may result in:

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- 1. Privacy and security incidents within the enrollments of your clients or additional Pennie customers
- 2. Privacy and security incidents within the Entity, Entity Manager or Assister profiles
- 3. Incorrect user account information, and/or
- 4. Enrollment errors





ADDRESS

P.O. Box 11873.

Harrisburg, PA 17108-1873 PHONE

+1844-844-8040

WEB

pennie.com