



The call will be recorded for sharing purposes

MS Teams Live Conference Call



All attendees' lines are muted



All questions can be typed using the Q&A function. Pennie Reps will answer them 1:1, publish or audibly address.



Note: There is a 20-40 second delay.

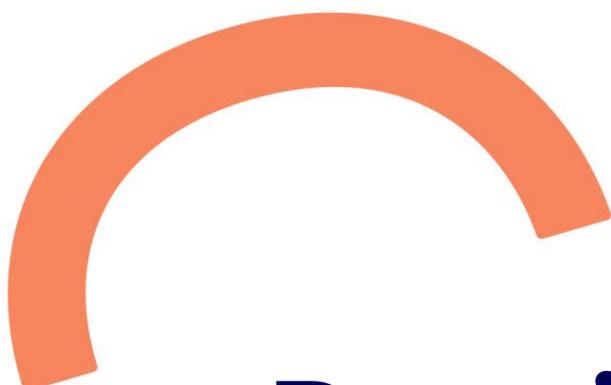


Broker Workgroup

September 10, 2021

Meeting Agenda

1. Pennie Updates
2. Pennie Broker Training & Re-Certification Update
3. Broker Dashboard
 - Broker Profile
 - Book of Business
 - Adding a New Customer
4. Questions?



Pennie Updates



Agency Updates

Open Enrollment 2022

- November 1, 2021, through January 15, 2022
- Regular Special Enrollment Period is still in effect for 2021 – QLEs apply
- Deadline for 1/1/22 coverage is 12/15/21
- Deadline for 2/1/22 coverage is 1/15/22

ACA Changes in the American Rescue Plan

- Provides significant savings for those enrolling Pennie and current customers for plan year 2021 and 2022
 - **Remember** - Caps premiums at no more than 8.5% of household income over 400%

Exchange Assister / Navigator Network

- Enrollment events schedule at pennie.com
- Pennie & YMCA Health Equity Tour – *BROKERS ARE ALWAYS WELCOME!*

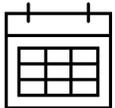
Broker Resources

- <https://agency.pennie.com/brokers/>
- <https://agency.pennie.com/brokerscertification/>

Get Informed. Get Educated.

Broker Workgroup

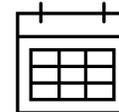
- Every other month
- Second Friday of the month
- 11-11:30am
- For all PA Brokers
- Prior meetings viewed here: [Pennie Broker Workgroup Page](#)



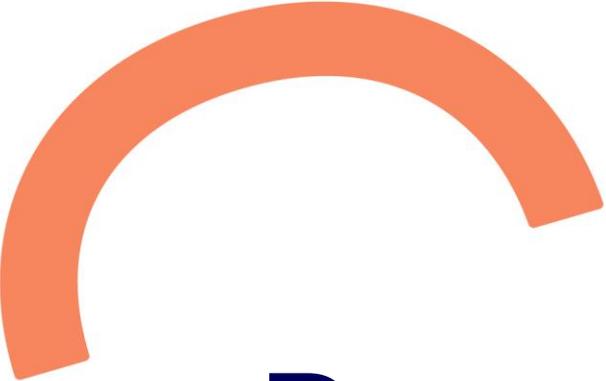
Next meeting: 11/12 @11am

Broker Lunch & Learn

- Every month
- Third Thursday of the Month
- 12:30 to 1:00 PM
- For new & existing Pennie Brokers
- Educational Instruction & FAQs
- Future Topics – Resolving DMIs, COBRA SEP, UC & ARP, Tracking Tickets, etc.
- [Prior L&L's viewed here](#) 



Next session: 9/16 @12:30pm



Pennie Broker Training & Re-Certification

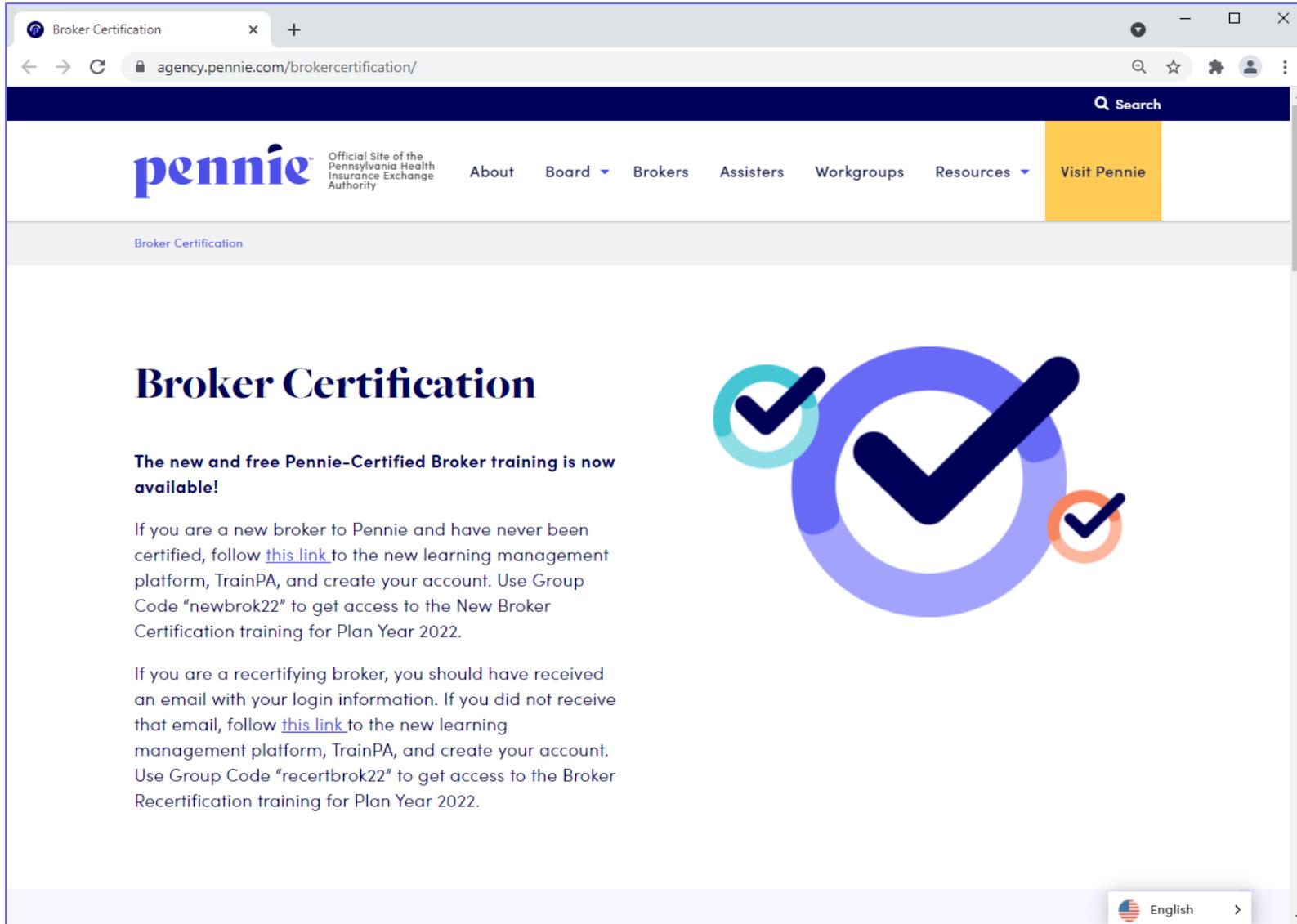


Broker Certification Training

- New training platform, Train PA, has been released!
- **NO COST** for new and renewing broker certification training
- Recertification deadline is **10/31/2021**
- Content changes including system updates and updated modules

NOTE: If the recertification deadline is missed, the broker may need to take the full certification course.

Access Broker Training: agency.pennie.com/brokercertification



Broker Certification

agency.pennie.com/brokercertification/

Search

pennie Official Site of the Pennsylvania Health Insurance Exchange Authority

About Board Brokers Assistants Workgroups Resources Visit Pennie

Broker Certification

Broker Certification

The new and free Pennie-Certified Broker training is now available!

If you are a new broker to Pennie and have never been certified, follow [this link](#) to the new learning management platform, TrainPA, and create your account. Use Group Code "newbrok22" to get access to the New Broker Certification training for Plan Year 2022.

If you are a recertifying broker, you should have received an email with your login information. If you did not receive that email, follow [this link](#) to the new learning management platform, TrainPA, and create your account. Use Group Code "recertbrok22" to get access to the Broker Recertification training for Plan Year 2022.

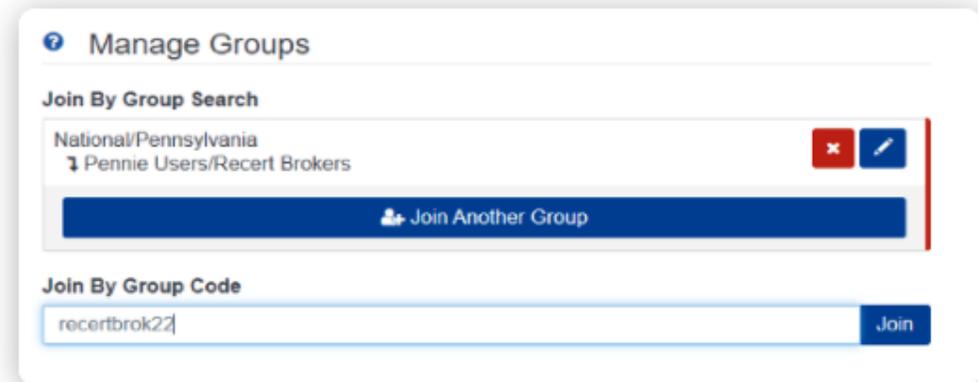
English

Tips:

- During TrainPA account creation, select the “Other” options during set up; then when prompted to login, update the group using the appropriate group code.

3 Type in the group number into the “**Join By Group Code**” box and hit “**Join**”.

1. Newly Certifying Broker Group Code – **newbrok22**
2. Recertifying Broker Group Code – **recertbrok22**



The screenshot shows a 'Manage Groups' window. At the top, there is a search bar labeled 'Join By Group Search' containing the text 'National/Pennsylvania' and a dropdown menu showing 'Pennie Users/Recert Brokers'. Below the search bar is a blue button with a person icon and the text 'Join Another Group'. At the bottom, there is a field labeled 'Join By Group Code' containing the text 'recertbrok22' and a blue 'Join' button.

Tips:

- For easy navigation through the modules, the link to the next module is in the descriptions of the current module.

PA-Pennie: Recertification Producer Training Overview

[← Back](#) [Register User](#) [History](#) [Launch >](#)

Completed [Web-Based Training - Self-Study](#) ID 1099576 Skill Level: Introductory 1h

★★★★☆ (354 Ratings)

When you complete the module click “Quit”, then click the following link for the next course - [PA-Pennie: Recertification Affordable Care Act Requirements, Eligibility Guidelines and Consumer Protections](#)

In this module, we defined some important terms, provided an overview of the roles and responsibilities of customer assistance entities, and discussed how to provide fair and accurate information to customers.
[Show More](#)



Tips:

- Once you have passed the exam, you will receive a “Certificate of Completion” and the following message:

Congratulations!

You passed the certification exam and now are officially a Pennie Certified Producer!

What's next?

If you are new to Pennie and need an account, you will go to Agency.Pennie.Com/Brokers and select **Create An Account**. Follow the prompts to either create your account as a new Agency with Pennie, or contact the Pennie Agency Manager within your organization to create the account within your agency

If you recertifying, there is nothing further you will need to do. We will update your certification end date to reflect the completion of the certification.

If you have any trouble, do not hesitate to contact us!

Broker Assistance Line - 844-844-8440

Email - Brokers@Pennie.Com

Resources – Agency.Pennie.Com/Brokers



Broker Dashboard Overview



Your Broker Profile



Home ▾ Individuals ▾ My Information ▾

Dashboard

Quick Links

[Pending Individuals](#)

[My Profile](#)

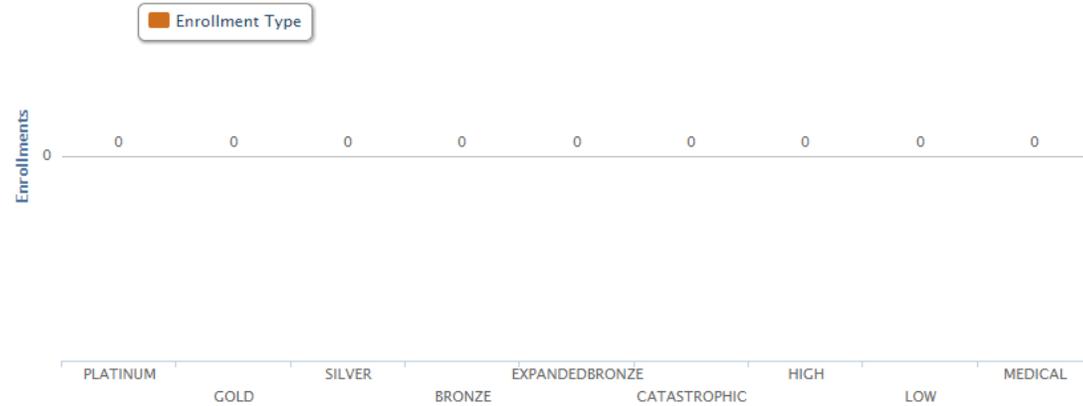
[My Delegation History](#)

[My Tickets](#)

[Add New Individual](#)

Enrollment History

Your Enrollments - Past 30 Days



Your Broker Profile



Home Individuals My Information

Brenda Smith

- Steps
- Agent Information**
- Profile
- My Tickets
- Certification Status
- Status



Agent Information

First Name Brenda
 Last Name Smith
 Pennsylvania Agent License Number 822446
 Agent NPN 09122121
 License Renewal Date 02/01/2024
 Individual Email brenda.smith@yopmail.com
 Primary phone number (717) 460-7307
 Business Contact Phone Number (814) 371-1507
 Preferred Method of Communication Phone
 Business Name Bright Light Insurance, LLC
 Federal Employer Identification Number (EIN) ***-**-3683
 Role Agent

Business Address

Business Address 1225 Sunset Park Rd.
 Reynoldsville, PA 15801

Your Broker Profile

Home Individuals My Information

Brenda Smith



- Steps**
- Agent Information
 - Profile**
 - My Tickets
 - Certification Status
 - Status

Profile

Review and edit your public profile, which can be seen by Pennie users looking for Agents. The more accurate the information you provide, the more likely it is that potential customers will contact you.



Brenda Smith
 1225 Sunset Park Rd.
 Reynoldsville, PA 15801

Phone number (717) 460-7307

Your Public Email brenda.smith@yopmail.com

Areas of Expertise Individuals / Families

Languages Spoken Spanish

Product Expertise Health, Dental, Vision, Life, Medicare, Medicaid, CHIP, Property/Casualty

Website address www.brightlightinsurance.com

Education Two Year Associate Degree

Your Broker Profile



Home Individuals My Information

- Quick Links
- Pending Individuals
- My Profile
- My Tickets
- Add New Individual



Ticket History [Submit New Ticket](#)

Ticket Id	Subject	Individual	Status	Created Date	Close Date
TIC-2188	Verify SSN of Shelly Hart	Brenda Smith	New	07-14-2021	
TIC-2186	Ticket submission for: Document Verification	Shelly Hart	New	07-13-2021	
TIC-2185	Verify Income of Dale Yates	Brenda Smith	New	07-13-2021	
TIC-2184	Ticket submission for: Document Verification	Dale Yates	New	09-30-2021	



Your Broker Profile

Home [Individuals](#) [My Information](#)

Brenda Smith

- Steps
- Agent Information
- Profile
- My Tickets
- Certification Status**
- Status



Certification Status

Agent Number 2000000707
Application Submission Date 07-13-2021
Certification Status Certified
Certification Number 5000000646
Certification Date 07-13-2021
Renewal Date 12-31-2022

Your Broker Profile



Home Individuals My Information

Brenda Smith

- Agent Information

- Profile

- Certification Status

- Status

- Comments

- Ticket History

- Actions

- View Agent Account



Status

Status Active

Status History

Date	Previous Status	New Status	View Comment
Jul 13, 2021	InActive	Active	No Comments

Pending Individuals 0 Customers

Refine Results By [\(Reset all\)](#)

First Name

Last Name

Request Sent

From:



To:



Go

No matching records found.

Book of Business – Active Individuals

Home [Individuals](#) [My Information](#)

Active Individuals

Q Search +

Sort by: Due Date (first due) Export as Excel

#	HOUSEHOLD	STATUS	COVERAGE
---	-----------	--------	----------

1	JACK ROSE		
	Phone: 7174607307 Email: jack.rose@yopmail.com	Application Year: Current Status: No Application Found	
Account Household Eligibility Comments Resend Activation Email Mark As Inactive			

2	DALE YATES		
	Phone: 7174607307 Email: dale.yates@yopmail.com Address: 1120 Beech St Washington PA 15301	Application Type: Financial Application Year: 2021 Current Status: Closed	
Account Household Eligibility Comments Resend Activation Email Mark As Inactive			

3	SHELLY HART		
	Phone: 7174607307	Application Type: Financial	

Book of Business – Inactive Individuals

[Home](#) [Individuals](#) [My Information](#)

Inactive Individuals 0 Customers

Refine Results By [\(Reset all\)](#)

First Name

Last Name

Inactive Since

From:

To:

[Go](#)

No matching records found.

Adding a New Customer

Home Individuals My Information

Dashboard

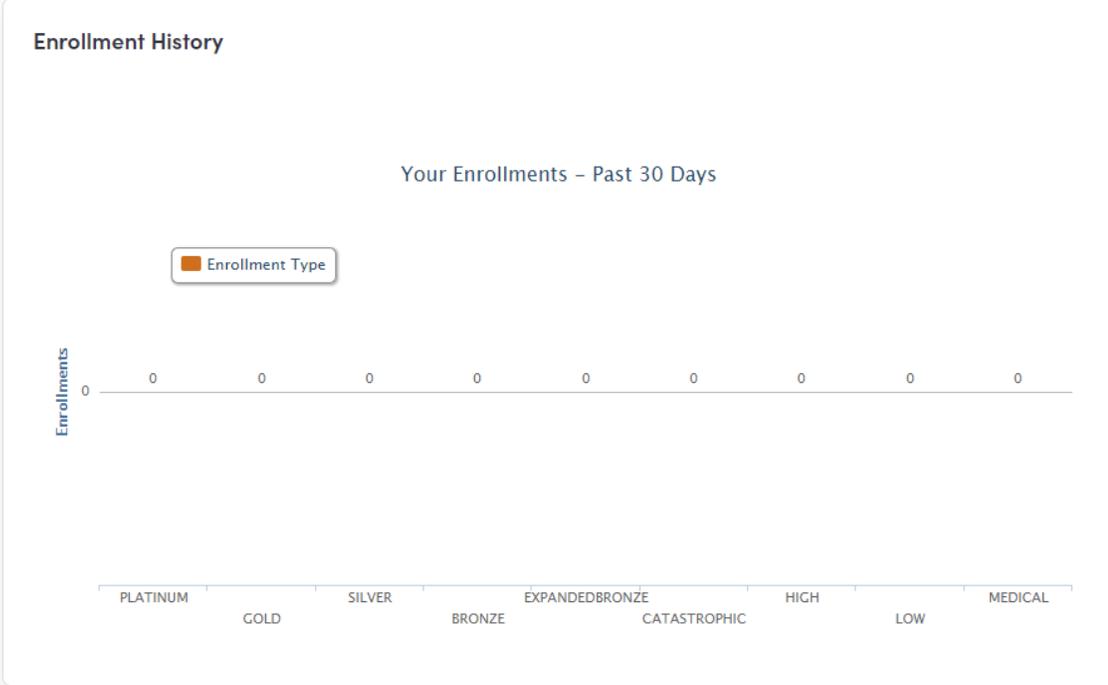
- Quick Links
- Pending Individuals

 - My Profile

 - My Delegation History

 - My Tickets

 - Add New Individual



Adding a New Customer

[Home](#) [Individuals](#) [My Information](#)

Create Customer Record

About Customer

Enter information for the customer to create a record prior to acting on the customer's behalf.

Customer Information

First Name *

Last Name *

Date Of Birth * 

Zip Code *

Phone Number *

Email Address

Note: If email is provided the new individual will be sent an email to activate a new account.



Adding a New Customer

pennie connecting Pennsylvanians to health coverage

Home 🏠 Individuals ▾ My Information

Help & Support ▾ My Account ▾

Create Customer Record

About Customer

Enter information for the customer to create a record prior to acting on the customer's behalf.

View Individual Account ✕

Clicking "Individual View" will take you to the Individual Portal for Sam Cooke. Through this portal you will be able to enroll on behalf of the individual.

Proceed to Individual View?

Don't show this message again.

First Name *

Last Name *

Date Of Birth * 📅

Zip Code *

Phone Number *

Email Address

Note: If email is provided the new individual will be sent an email to activate a new account.

Adding a New Customer

Welcome, Sam Cooke

Your Agent -

My Stuff

- My Dashboard
 - My Applications
 - My Eligibility Results
 - My Enrollments
 - My Inbox
 - My Tickets
 - My Preferences
- Quick Links
- Find Local Assistance

2021

As part of the American Rescue Plan, Pennie is offering additional financial assistance to Pennsylvanians regardless of income, who otherwise qualify. If you are a current Pennie customer, these savings may have already been applied to your account. You can check your new financial assistance amount and net premium [here](#). If you previously did not apply for financial assistance, you must change your selection to a financial assistance application to qualify. For more information about the American Rescue Plan, visit our FAQs page at [Pennie.com](#).

Next Steps

You missed the open enrollment period for 2021 to shop and enroll in a health plan. You can still enroll if you have a Qualifying Life Event.

Start New Application

Overview

Your Application Status (Your Case ID is PA1100002132)

2021 Application	Not started	Start Application
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Adding a New Customer

pennie connecting Pennsylvanians to health coverage

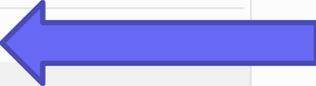
Home # Individuals - My Information -

Active Individuals

Q Search +

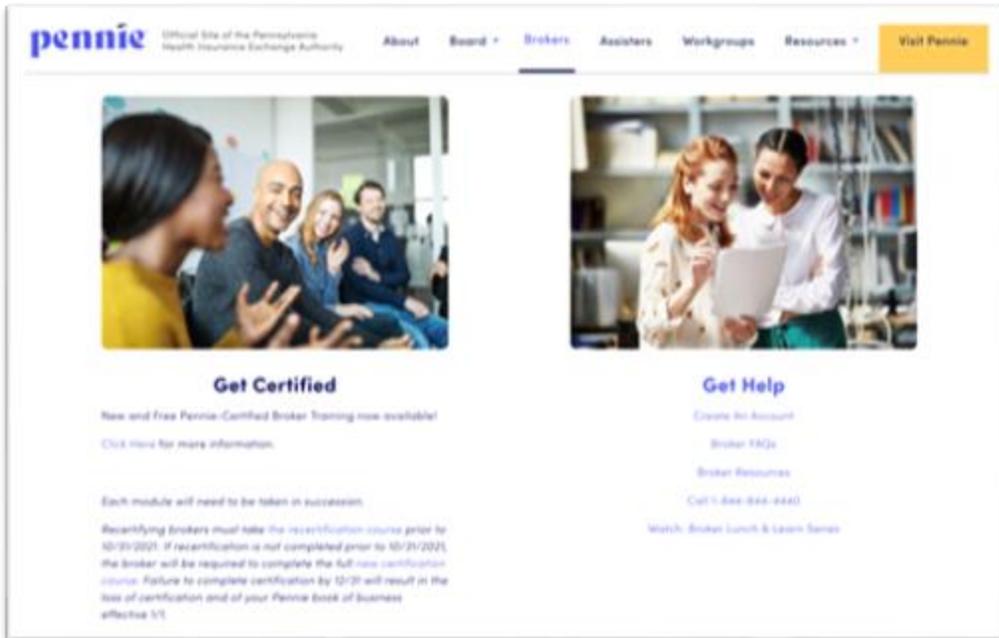
Sort by: Due Date (first due) ▼ Export as Excel

#	HOUSEHOLD	STATUS	COVERAGE
1	JACK ROSE Phone: 7174607307 Email: jack.rose@yopmail.com	Application Year: Current Status: No Application Found	
<small>Account Household Eligibility Comments Download Activation Email Mark As Inactive</small>			
2	DALE YATES Phone: 7174607307 Email: dale.yates@yopmail.com Address: 1120 Beech St Washington PA 15301	Application Type: Financial Application Year: 2021 Current Status: Closed	
<small>Account Household Eligibility Comments Download Activation Email Mark As Inactive</small>			
3	SHELLY HART Phone: 7174607307 Email: shelly.hart@yopmail.com Address: 1123 Beech Street Washington PA 15301	Application Type: Financial Application Year: 2021 Current Status: Closed	
<small>Account Household Eligibility Comments Download Activation Email Mark As Inactive</small>			
4	JANE ROE Phone: 7174607307 Email: jane.roe@yopmail.com	Application Year: Current Status: No Application Found	
<small>Account Household Eligibility Comments Mark As Inactive Submit New Ticket</small>			
5	JANET YAW Phone: 7174607307 Email: janet.yaw@yopmail.com	Application Year: Current Status: No Application Found	
<small>Account Household Eligibility Comments Download Activation Email Mark As Inactive</small>			
6	SAM COOKE Phone: 7242222933 Email: sam.cooke@yopmail.com	Application Year: Current Status: No Application Found	
<small>Account Household Eligibility Comments Download Activation Email Mark As Inactive</small>			



Broker Resources

- agency.pennie.com/brokers
- +1 (844) 844-4440
- agency.pennie.com/brolercertainment



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Get Certified

New and Free Pennie-Certified Broker Training now available!

[Click here for more information.](#)

Each module will need to be taken in succession.

Recertifying Brokers must take the recertification course prior to 10/31/2021. If recertification is not completed prior to 10/31/2021, the Broker will be required to complete the full new certification course. Failure to complete certification by 10/31 will result in the loss of certification and of your Pennie Book of Business effective 1/1.



Get Help

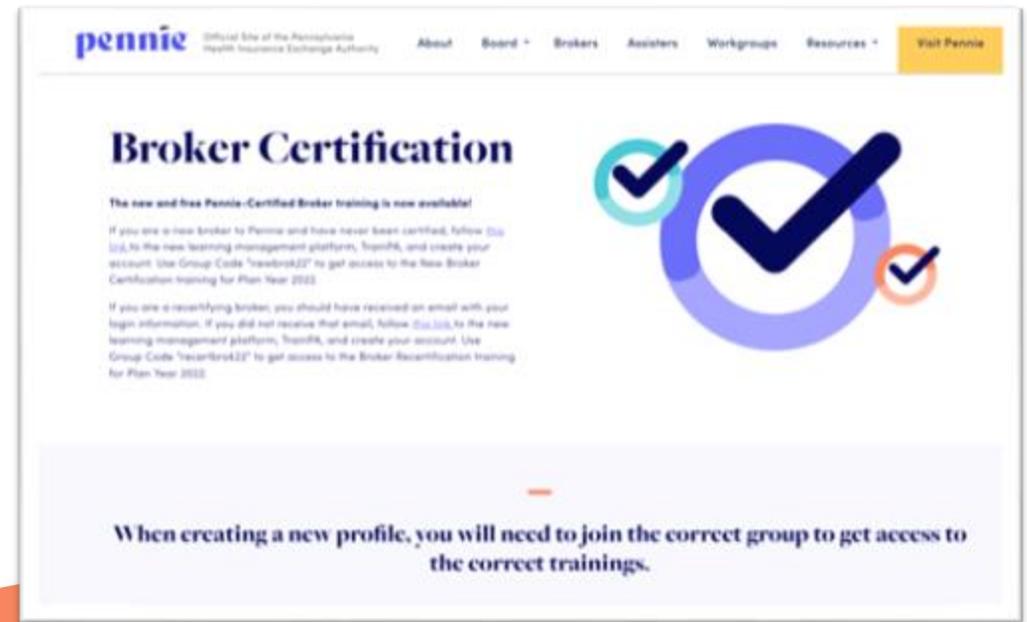
[Create An Account](#)

[Broker FAQs](#)

[Broker Resources](#)

Call 1-844-844-4440

[Watch: Broker Lunch & Learn Series](#)



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Broker Certification

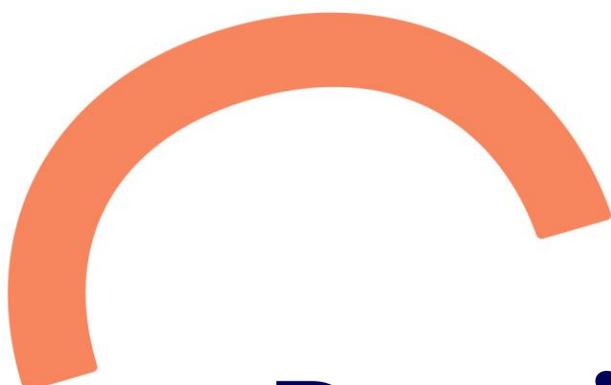
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When creating a new profile, you will need to join the correct group to get access to the correct trainings.



Pennie is here to help



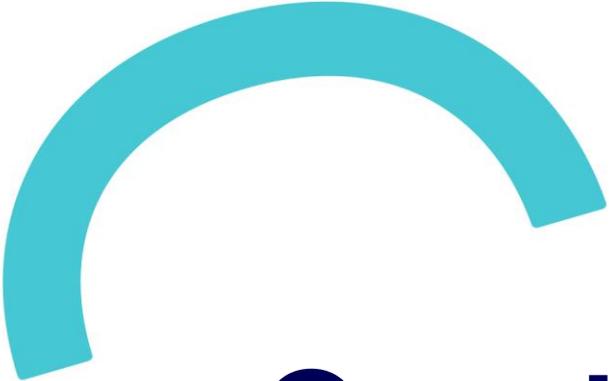
We're here to help:

Questions, Comments, Suggestions always welcome!

Contact us at Brokers@pennie.com

Find additional resources on Agency.Pennie.com/Brokers

As always, the materials and recording from this workgroup will be posted to: agency.pennie.com/agency-partners/brokerworkgroupmaterials/



Questions for Pennie



pennie[™]

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