

# Pennsylvania State Based Exchange Platform

# Assister User Reference Manual

09/01/2022

Version 2.0

Commonwealth of Pennsylvania

Pennsylvania Health Insurance Exchange Authority d/b/a Pennie® 312-318 Market Street, Bowman Tower, Floor 3 Harrisburg, PA 17101

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# 1. Overview

This manual is intended to provide a detailed description of the functions available through the Certified Assister Portal of the Pennie Platform. Assisters refers collectively to the individual Navigators, PA Assisters, or CACs within an "Entity" organization who are certified by Pennie® to offer enrollment assistance to Pennsylvania's Affordable Care Act marketplace customers. Throughout this document, individual Navigators or Certified Application Counselors (CACs) are referred to as "Assisters," per the definitions set forth in the <u>Navigator and Exchange Assister</u> Accessibility and Regulation Act, act of Jun. 19, 2015, P.L. 25, No. 7, 40 P.S. §§ 4401 *et seq*.

The Assister Portal is a complete solution for Pennie-certified Assisters to submit applications and enrollments and perform account maintenance transactions on behalf of existing customers, create new user accounts on behalf of new customers, and manage their book of business.

**PLEASE NOTE:** This manual is for Pennie-certified Assisters who have already completed Pennie Assister Training and Certification Curriculum and completed the user account registration process for the Pennie Platform. For information on training/certification and gaining access to the Pennie Platform please refer to the Pennie Entity and Assister Onboarding Guide.

# 2. Home Page

Home 🏶 Individuals 👻 My Information 👻

The Enrollment Dashboard is a landing page for the Assister portal. This page shows a count of the Assister enrollments for the past 30-days as distributed across the type of plans selected.

## 2.1 Pending Delegation Requests

The Pending Requests page displays a list of pending individuals that have requested Assister designation. The Assister has the option to accept or decline an individual's designation request. If a request is accepted, then the individual will move to the Active Individuals section. If the request is declined, the customer will automatically move to the Inactive Individual section. The Assister can view and search for the list of pending individuals filtered by their first name, last name, and request sent date.

pennie connecting Permasiw	eniars to health coverage"		🕷 👩 Hsip & Support - My Account -
	Harns # Individuals • My Infor	atiluta •	
c	Dashboard		
	Quick Links	Enrollment Dashboard	
	<ul> <li>Pending Delegation</li> <li>Requests</li> </ul>	Your Forcellinents - Pest 30 Days some Vennand	
	A My Profile		
	Add New Individual	1, 2 5 6 3 6 3 6 0 0	<u>A</u>

## **2.1.1** View and search for pending designation requests

• Step-1: Go to 'Home Page' and click on 'Pending Delegation Requests' tab under "Quick Links" section.

Home 🕷 Individuals - My Inf	ormation -
Dashboard	
Quick Links	Enrollment Dashboard
O Pending Delegation Requests     My Profile	Your Enrollments - Past 30 Days Sector Generation
My Delegation History Add New Individual	
	RATINUM         SULTR         EXPANDEMENTAL         HOM         MEDICAL           RATINUM         COLD         SULTR         ROART         CALATION HE         LOW         MEDICAL

• Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range during which an individual sent the designation request in the 'Request Sent' section under the "Refine Results By" section and click on the 'Go' button.

Home 🕷 Individuals - My Info	rmation -					
Pending Delegation	Requests 1 Pend	ing Individual				
Refine Results By (reset all)	Name a	Family Size ¢	REQUEST SENT ©	0		
First Name	Cara Danvers NR- Not Available	N/A	11/07/2021	0-		
Last Name						
Request Sent						
From: mm/dd/yyyy						
To:						
mm/dd/yyyy 🛍						
Go						

## 2.1.2 Accept or decline individual designation request

• Step-1: Go to 'Home Page' and click on 'Pending Delegation Requests' tab under "Quick Links" section.

pennie connecting Pennsylvan	mans to health coverage"											• 🚅	Help & Support -	My Account+
	Home # Individuals - My Inform	mation •												
D	ashboard													
	Quick Links	Enrolln	nent Dash	board										
	<ul> <li>Pending Delegation</li> <li>Requests</li> </ul>				Y	our Enrollm	ents - Past : e: Getinsured	30 Days						
	📥 My Profile													
	My Delegation History													
	👗 Add New Individual	Enrollmen	0	0	0	0	0	0	0	0	0			
			PLATINUM	COLD	SILVER	BRONZE LONZE DOPA		CATASTROPHIC		LOW	MEDICAL			

• Step-2: Click on <sup>\*</sup> and click on 'Accept' to accept an individual's delegation request or click on 'Decline' to decline the request.

Home 🕷 Individuals - My Info	rmation -					
Pending Delegation	Requests 1 Pend	ing Individual				
Refine Results By (reset all) First Name	Name e Cara Danvers	Family Size © N/A	REQUEST SENT 0 11/07/2021	° 0-		
Last Name				Accept Decline		
Request Sent						
From: mm/dd/yyyy 🗎						
mm/dd/yyyy 🗎						

# 2.2 My Information/Profile

The My Information/Profile section displays the Assister's public profile information. This information will be displayed to customers who use Pennie's "Find Local Assistance" directory tool. The Assister can update their profile information and mailing address within the My

Information section. Note – you may access "My Information" from the upper toolbar or through the "Profile" under "Quick Links:"

Home 🏶 Individuals 🗸	My Information -
	Counselor Information
Olivia Fox	My Profile Certification Status
Steps	Status

Home 🕷 Individuals - My	Information -			
Olivia Fox				
Steps	Profile			
My Information	Olivia Fox	View larger map Fairf by		
Certification Status		DuBois DuBois, PA 1		
Status	Phone Number Email	Gougle S Map Data Terms of Una 6		
	Language Spoken Hmong Language Written Hmong			
	Education High School Graduate			

## 2.2.1 Add or update Assister profile photo

• Step-1: Go to 'Home Page' and click on 'Profile' tab under "Quick Links" section, then select "My Information."

Home 🏘 Individuals - My	Information -			
Olivia Fox				
Steps	Profile			
My Information	Olivia Fox	View larger map		
Certification Status		DuBois P0 Beaver Dr. DuBois PA 1 Macry Are		
Status	Phone Number Email Language Spoken Hmong	Google 20 May Data Termanifue @		
	Language Written Hmong			
	Education High School Graduate			

• Step-2: Click on the 'Edit' button.

pennie connecting Pennsylvanians to health coverage			*	-	Help & Support 👻	My Account+
Home 🏶 Individuals	My Information					
Olivia Fox						
Steps	Assister Information		Edit			
My Information Profile	First name Last name Email					
Certification Status Status	Phone number Secondary Phone Number How would you like us to contact you?					
	you? Assister Certification # Primary Assister Site	0000867530				
	Secondary Assister Site					

• Step-3: Click on 'Choose File'.

Upload Photo	Choose File	No file chosen
	File size lim	it is 5 MB.
	<u> </u>	0
	Cancel	Save

• Step-4: A file browser opens. Navigate to the file on your computer of the photo that you wish to use and double click on the photo or select it and click on the 'Open' button.

Organize 👻	New folder	r	1	1	- 🛛 🛛
<ul> <li>Desktop</li> <li>For Sharin</li> <li>Receipts</li> <li>OneDrive -</li> </ul>		P	P	P	P
<ul> <li>This PC</li> <li>3D Object</li> <li>Desktop</li> <li>Documer</li> <li>Download</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> </ul>	nts ds	Pennie-Orange-F inalMonogramT M	Pennie-Purple-Fi nalMonogramT M	Pennie-Teal-Final Monogram TM	Pennie-Yellow-Fi nalMonogramT M
🔮 Windows 🥩 Network	v	me: Pennie-Orange-F	FinalMonogramTM	<ul> <li>All Files</li> <li>Open</li> </ul>	Cancel

• Step-4: Click on the 'Save' button.

Upload Photo	Choose File No file chosen File size limit is 5 MB.
	Cancel Save

## 2.2.2 Add or update Assister profile information

• Step-1: Go to 'Home Page' and click on 'My Profile' tab under "Quick Links" section and select "My Information." Note – you may access "My Information" from the upper toolbar or through the "Profile" under "Quick Links:"

	Counselor Information	
Olivia Fox	My Profile	
	Certification Status	
	Status	
Steps	Frome	
Pennie connecting Pennsylvanians to h	health coverage"	🕷 – 🚛 – Help & Support –
	Individuals - My Information -	🕷 🚒 Help & Support •
Home Olivia Steps My Infi Profile		
Home Olivia Steps My Infi Profile	Individuals - My Information -  Fox  Profile  Olivia Fox  Olivia Fox  Phone Number  Olivia Fox  Oliv	ng Fart

• Step-2: Click on the 'Edit' button.

Home # Individuals - My	Information *			
Olivia Fox				
Steps	Assister Information		Edit	
My Information	First name	Olivia		
Profile	Last name Email	Fox		
Certification Status	Phone number			
Status	Secondary Phone Number How would you like us to contact you?	email		
	Assister Certification #	0000867530		
	Primary Assister Site	Fred's Stars		
	Secondary Assister Site			

• Step-3: Enter Assister's mailing address and profile information (e.g., "Spoken Languages Supported" or "Written Languages Supported") in the "Mailing Address" section and click on the 'Save' button.

Accluter Information	
Fital name	Olivia
Latinano	
Ind	110
	Frankenitössinantens
Phone number	
Secondary Phone Humbs	<sup>2</sup> 335 533 5335
How would you like us t contact you?	o encal O Phone
	D Mail
Assister Certification	0000067530
Primary Assister Sile	Freds Stors
Secondary Assister Sil	Select V
Mailing Address	
Sinsel Address 1	Street Name, P.O. Ros, Company, c/o
Sul	P Apl, Sullo, Unit, Ilidg, Roor, elc
City	City, Town
Sitale	Pennayhania 😽
71p Cad	ZpCo
Profile Information	
Spoken Language Supported (Select all the	□ English
apply)	Anabic Armanian
	Combodian
	Camionese Forsi
	s limong
	Careen
	Mandarin     Russian
	🗆 Spanish
	🗆 Tagalog 🕞 Weinamese
	Other Index Splan
Written Language	
Supported (Select all the opply)	Anabic
41.0	- writeerice
	Combodian     Foni
	g limong
	Korven
	C Russian
	_ Spanish
	Tagalog     Traditional Chinese character
	U Vielmameae
	Colhor Lobari Kama Options
Education	High School Gradus 💙
Upload Phot	Choose File No file chosen File size limit is 5 MB.
	Cancel Save

# 2.3 Add New Individual

The Assister can create a new customer account on behalf of a customer through the Add New Individual section. Once the new customer is added, the Assister can act as proxy to the customer account and perform activities on behalf of them. (To learn how to be a proxy to an individual account and further steps, please refer to Section 3.2.2.5)

• Step-1: Go to 'Home Page' and click on 'Add New Individual' tab under "Quick Links" section.

pennie connecting Pennsylvanians to health coverage		#	🔊 Help & Support •	My Account +				
Home 🕷 Individuals - My	Information •							
Dashboard	Quick Links     Enrollment Dashboard							
Quick Links         O       Pending Delegation         Requests       My Profile         My Profile       My Poelegation History         Add New Individual       Add New Individual	Your Enrollments - Past 30 Days           Source: Cetinured           0							
	TRATHRIM COLD SLVER SLVER STRADE DYANDIDERONZE CATASTROPHIC HIGH LOW MEDICAL							

• Step-2: Enter new customer's information (e.g., "First Name" or "Email Address") and click on the 'Start' button.

**<u>PLEASE NOTE</u>**: The customer will receive an email to activate their new account only if a customer email address is provided.

Home 🕷 Individuals - My Inform	ation •				
Create Customer Rec	ord				
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 Cade + Phone Number +	MM/DD/YYYY 🖀			
		Note: If email is provided the new individual will be sent an email to activate account.	a new		

• Step-3: A pop-up box will appear. Click on 'Individual View' to proxy a customer account or click on 'Cancel' to cancel the process.

View Customer Account		3
Click on Customer Application to go	to the consumer	portal
for Dan Thomas. You will be able to	complete the ap	plication, make
changes, or select a plan on behalf o	of the customer. I	Proceed to the
Customer Portal?		
Proceed to Individual view?		
Proceed to individual view?		

For detailed information on how to act as a proxy to an individual account please refer to Section 3.2.2.5.

# 3. Individuals

pennie	connecting Pennsylvanians to heal	th coverage <sup>∞</sup>	
	Home 希	Individuals 🗸	My Information -
	Dashbo	Pending Rea Active Custo Inactive Cus	mers
		indenite eds	

# 3.1 Pending Requests (New Designation Requests)

For detailed information on Pending Requests, please refer to Section 2.1.

# 3.2 Active Individuals/Customers (Existing Designations)

An Active Individuals page displays a complete list of individuals assigned to the Assister. The Active Individuals list displays their name, family size, household income, eligibility status, application status, and an action button that helps the Assister in performing actions on an individual account.

The Active Individuals section helps the Assister to search for an active individuals list, edit individual summary, provide comments on an individual's profile, act as a proxy to a customer's application, resend the activation email to an individual, and mark an individual as inactive.

pennie connecting	Pennsylvanians to health coverage"						#	-	Help & Support +	My Account+
	Home # Individuals - My Infor	mation +								
	Active Individuals 7Ac	live Individuals				Export	as Exce	ы		
	Refine Results By (reset all)	Name +	Family Size a	HOUSEHOLD INCOME =	ELIGIBILITY STATUS +	Application Status +	o			
	First Name	Dan Thomas	1	0.0	Conditional	Eligibility Received	0			
	Last Norme	Linda Ortega	N/A	0.0			0			
		Lindo Dovis	N/A	0.0	Pending	Open	•			
	Eligibility Status	Lita Ortega	N/A	0.0	Pending	Open	0			
	Select ~	Lita Rivera	N/A	0.0	Pending	Open	0			
	Application Status	Phred Cor	N/A	0.0			0			
	Select 👻	Steve Yeager	N/A	0.0			0			
	Go	Arth The Residence								

## **3.2.1** View and search for active individuals

• Step-1: Click on 'Individuals' tab and select 'Active Customers'.

Home 🏶	Individuals +	My Info	ormation +
	Pending Req	uests	
ctive Ir	Active Custo	tive Indivi	
	Inactive Cust	omers	inve marri
		-	

• Step-2: Enter individual's first name in the 'First Name' field or last name in the 'Last Name' field or select individual eligibility status (e.g., "Pending" or "Conditional") from the 'Eligibility Status' drop-down list or select individual application status (e.g., "Open" or "Submitted") from the 'Application Status' drop-down list and click on the 'Go' button.

Home # Incluiduals - My Into	motion -							
Active Individuals 74	Active Individuals 7 Active Individuals. Beport of Boot							
Refine Results By (reset all)	Nome a	Fursily Size ±	HOUSEHOLD INCOME =	ELIGIBILITY STATUS +	Application Status 4	٠		
First Name	Don Thomas	4	0.0	Conditional	<b>Bigibility Received</b>	0		
Local Nume	Lindo Ortego	N/A	0.0			<b>9</b>		
	Lindo Dovis	N/A	0.0	Pending	Upper	•		
Eligibility Status	Life Orlege	N/A	0.0	Pending	Open	e.		
Select v	Lito Rivera	N/A	0.0	Pending	Open	0		
Application Status	Phred Car	N/A	0.0			•		
Select v	Stove Yeager	N/A	0.0			0		
60	Ch. Scandab							

### 3.2.2 Perform actions on a designated customer account

The Assister can perform actions on customer accounts, which includes each individual's summary, such as, provide comments on an individual's profile, act as a proxy to an individual account, resends the account activation email, and marks an individual as inactive.

### 3.2.2.1 Update individual summary

**PLEASE NOTE:** Assisters can individually edit each summary only for the individuals who have not yet completed their sign-up process.

Failure	×
This action is only allowed for individual consumers who have not completed the sign up process.Dan Thomas has already completed the sign up process.	2
OK	

• Step-1: Click on 'Individuals' tab and select 'Active Individuals'.

dividuals <del>-</del>	My Info	rmation -
ending Req	uests	
ctive Custor	mers	tive Indivi
nactive Cust	omers	inte indiri
	Active Custor	Pending Requests Active Customers nactive Customers

• Step-2: Click on the 🔅 button and click on 'Details'.

Home 🕷 Individuals - My Infor	mation •						
Active Individuals 7Ac	tive Individuals				Export a	is Excel	
Refine Results By (reset all)	Name =	Family Size ©	HOUSEHOLD INCOME a	ELIGIBILITY STATUS #	Application Status +	0	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	0	
Last Name	Linda Ortega	N/A	0.0		Details	1	
	Linda Davis	N/A	0.0	Pending	Mark as Inactive		
Eligibility Status	Lita Ortega	N/A	0.0	Pending	View Enrollment Detail	ls .	
Select ~	Lita Rivera	N/A	0.0	Pending	Open	•	
Application Status	Phred Car	N/A	0.0			0	
Select v	Steve Yeager	N/A	0.0			0	
Go	N/A - Not Available						

• Step-3: Go to "Summary" section and click on the 'Edit' button.

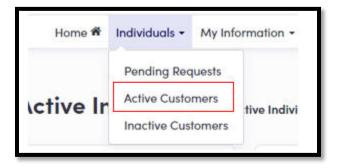
Home 🕷 Individuals - My	Information -			
Home a individuois a my	information -			
Dan Thomas				
Summary	Summary		Edit	
Comments	Primary Applicant	Dan Thomas		
© Actions	Address Phone Number			
🗭 New Comment	Email Address			
View Customer Application	Eligibility Status Application Status	Conditional Eligibility Received		

• Step-4: Enter the individual information and click on the 'Save' button.

Home 🌴 Individuals - My In	formation +				
Linda Davis					
Summary Comments C Actions Mew Comment Wire Customer	Summary Primary Applicant Email Address • Primary Phone Number •	Linda Davis company@email.c xxx xxx	2007	Save	
Application					

## 3.2.2.2 Provide comments on an individual profile

• Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



• Step-2: Click on the 🔅 button and click on 'Details'.

Home 🕷 Individuals - My Infor	mation *					
Active Individuals 7Ac	tive Individuals				Export as Exce	ol
Refine Results By (reset all)	Name a	Family Size a	HOUSEHOLD INCOME a	ELIGIBILITY STATUS	Application Status = 0	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	
Last Name	Linda Ortega	N/A	0.0		Details	
	Linda Davis	N/A	0.0	Pending	Mark as Inactive	
Eligibility Status	Lita Ortega	N/A	0.0	Pending	View Enrollment Details	
Select ~	Lita Rivera	N/A	0.0	Pending	Open	
Application Status	Phred Car	N/A	0.0		0	
Select ~	Steve Yeager	N/A	0.0		0	
Go	N/A - Not Available					

• Step-3: Go to "Comments" section and click on the 'Add Account Note' button.

pennie connecting Per	nng/vanians to health coverage".	*	62	Help & Support +	My Account+
	Home 🕷 Individuals • My Information •				
	Linda Davis				
	About this Customer Comments				
	Summary No Account Note Add Account Note				
	Comments Outlines				
	New Commant				
	Prev Customer Application				
	S Reend Activation Email				

• Step-4: Provide comments in the text area and click on the 'Post Account Note' button.

Home 🏶 Individuals - My Info	ormation -			
Linda Davis				
About this Customer	Comments			
Summary	No Account Notes Add Account Note			
Comments				
© Actions				
P New Comment				
View Customer Application		Characters left: 4000 Cancel Po	st Account Note	
Resend Activation Email				

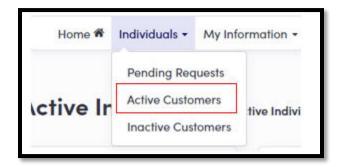
• Step-5 (Another way): Perform Step-1 and Step-2 from Section 3.2.2.2 and go to "Actions" section and click on the 'New Comment' button.

Home 🕷 Individuals - My Info	ermation -			
Linda Davis				
Summary	Summary		Edit	
Comments	Primary Applicant	Linda Davis		
© Actions	Address			
P New Comment	Phone Number Email Address	(717)460-7307 linda.davis@yopmail.com		
View Customer     Application	Eligibility Status Application Status	Pending Open		
Resend Activation Email				

• Step-6 (Another way): A pop-up screen will appear. Enter comments in the text area and click on the 'Save' button.

## 3.2.2.3 Update comments on an individual profile

• Step-1: Click on 'Individuals' tab and select 'Active Individuals'.



• Step-2: Click on the 🍄 🔨 button and click on 'Details'.

Home 🏶 Individuals - My Infor	mation •					
Active Individuals 7Ac	tive Individuals				Export as Exc	sel
Refine Results By (reset all)	Name =	Family Size +	HOUSEHOLD INCOME a	ELIGIBILITY STATUS @	Application Status *	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	
Last Name	Linda Ortega	N/A	0.0		Details	
	Linda Davis	N/A	0.0	Pending	Mark as Inactive	
Eligibility Status	Lita Ortega	N/A	0.0	Pending	View Enrollment Details	
Select v	Lifa Rivera	N/A	0.0	Pending	Open	
Application Status	Phred Car	N/A	0.0		0	
Select v	Steve Yeager	N/A	0.0		0	
Go	N/A - Not Available					

• Step-3: Go to "Comments" section and click on the button next to a comment.

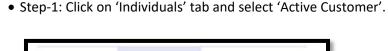
Home ♥ Individuals • My Info	mation +		
About this Customer	Comments		
Summary Comments	Olivia Fox added an account note - 01 Sep, 2022 12:09 PM Linda stopped by for an appointment.	1	
© Actions	Add Account Note		
View Customer     Application			
Resend Activation Email			

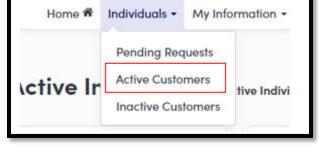
• Step-5: Enter the updated comment in the text area and click on the 'Update Account Note' button.

Home 🖷 Individuals + My Info	rmation *		
Linda Davis			
About this Customer	Comments		
Summary			
Comments	Olivia Fox added an account note - 01 Sep, 2022 12:09 PM Linda stopped by for an appointment.	1	
<b>O</b> Actions			
P New Comment			
<ul> <li>View Customer</li> <li>Application</li> </ul>	Cancel Update Account Note		
Resend Activation Email	Add Account Note		

## 3.2.2.4 View customer application

The Assister can view an individual customer's account and can perform actions on their behalf when a proxy relationship is established. They can perform actions such as report qualifying life events, shop for new health and dental plans, start a new individual application, view application status, view household eligibility, view current health and dental plans, view current and past enrollments, check inbox messages, update communication preferences, use find local assistance tool, view Assister profile, and de-designate an Assister.





• Step-2: Click on the 🌞 button and click on 'Details'.

Home # Individuals - My Infor	mation •						
Active Individuals 7Ac	tive Individuals				Export	as Excel	
Refine Results By (reset all)	Name a	Family Size +	HOUSEHOLD INCOME a	ELIGIBILITY STATUS	Application Status ©	0	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	0	
Last Name	Linda Ortega	N/A	0.0		Details	1	
	Linda Davis	N/A	0.0	Pending	Mark as Inactive		
Eligibility Status	Lita Ortega	N/A	0.0	Pending	View Enrollment Deta	ils	
Select ~	Lita Rivera	N/A	0.0	Pending	Open	•	
Application Status	Phred Car	N/A	0.0			•	
Select v	Steve Yeager	N/A	0.0			0	
Go	N/A - Not Available						

• Step-3: Go to "Actions" section and click on 'View Customer Application'.

Home 🕷 Individuals + My	Information -			
Dan Thomas				
Summary	Summary		Edit	
Comments	Primary Applicant	Dan Thomas		
© Actions	Address Phone Number			
P New Comment	Email Address			
View Customer Application	Eligibility Status Application Status	Conditional Eligibility Received		

• Step-4: A pop-up box will appear. Click on 'Individual View' to proxy an individual account or click on 'Cancel' to cancel the process.

View Customer Account		×
Click on Customer Application to go to for Dan Thomas. You will be able to co changes, or select a plan on behalf of Customer Portal?	omplete the app	lication, make
Proceed to Individual view?		
□ Don't show this message again.	Cancel	Individual View

• Step-5: The following screen displays customer account.

pennie correcting Pernaylvenians to health coverage"	Español	*	P	Help & Support 🕶	My Account 🕶
Ylewing Individual Account (Dan Thomas) My Account					

### 3.2.2.5 Resend activation email

**PLEASE NOTE:** The Resend Activation Email feature is only available for customers who have not completed the sign-up process. This step will allow Assisters to edit the individual email address and phone number before resending the activation link.

• Step-1: Click on 'Individuals' tab and select 'Active Customers'.



• Step-2: Click on the 🍄 📩 button and click on 'Details'.

Home 🏶 Individuals - My Infor	mation •					
Active Individuals 7Ac	tive Individuals		Export as Exce			
Refine Results By (reset all)	Name =	Family Size a	HOUSEHOLD INCOME 0	ELIGIBILITY STATUS @	Application Status a o	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	
Last Name	Linda Ortega	N/A	0.0		Details	
	Linda Davis	N/A	0.0	Pending	Mark as Inactive	
Eligibility Status	Lita Ortega	N/A	0.0	Pending	View Enrollment Details	
Select v	Lifa Rivera	N/A	0.0	Pending	Open	
Application Status	Phred Car	N/A	0.0		•	
Select ~	Steve Yeager	N/A	0.0		0	
Go	N/A - Not Available					

• Step-3: Go to "Actions" section and click on 'Resend Activation Email'.

Home 🕷 Individuals 👻 My Infe	ormation *			
Linda Davis				
Summary	Summary		Edit	
Comments	Primary Applicant	Linda Davis		
© Actions	Address Phone Number			
P New Comment	Email Address			
View Customer Application	Eligibility Status Application Status	Pending Open		
Resend Activation Email				

• Step-5: A pop-up screen will appear with a 'Success!' message.

Success!
A new activation email has been sent to Linda Davis.
Ok

## 3.2.3 Mark an individual as inactive

**PLEASE NOTE:** This action cannot be undone. If an individual is marked as inactive, then it will terminate the existing relationship between the Assister and Customer. The marked inactive individual will be listed in the "Inactive Individuals" section.

• Step-1: Click on 'Individuals' tab and select 'Active Customers'.

Home 希	Individuals -	My Information -
	Pending Requ	ests
ctive Ir	Active Custom	ers tive Indiv
cinve ii	Inactive Custo	

• Step-2: Click on the <sup>\*\*\*</sup> button and click on 'Mark as Inactive'.

Home # Individuals - My Inf	ormation •						
Active Individuals 7/	Active Individuals	ive Individuals					
Refine Results By (reset all)	Name s	Family Size o	HOUSEHOLD INCOME a	ELIGIBILITY STATUS @	Application Status 0	•	
First Name	Dan Thomas	4	0.0	Conditional	Eligibility Received	•	
Last Name	Linda Ortega	N/A	0.0			•	
	Linda Davis	N/A				•	
Eligibility Status	Lita Ortega	N/A				•	
Select ~	Lita Rivera	N/A	0.0	Pending	Open	<u>.</u>	
Application Status	Phred Car	N/A	0.0			•	
Select ~	Steve Yeager	N/A	0.0		Details		
Go	N/B - Not Available			[	Mark as Inactive		

• Step-3: A pop-up screen will appear. Click on 'Confirm' to inactivate a current individual account or click on 'Cancel' to cancel the process.

**PLEASE NOTE:** If you mark an individual account as inactive, then you will no longer have access to their account. The individual must send you another designation request to you to perform actions on their behalf.

Are You Sure?	×
Are you sure you want to remove designation for this account? If you confirm, you will no longer have access to this account. Should you change your mind in the future, this person will have to send you another designation request before you can access their account again.	

# 3.3 Inactive Individuals (Undesignated Customers)

The Inactive Individual section displays the list of individuals whose designation requests have been declined, marked as inactive by the Assister, or the individual has undesignated the Assister.

The Assister can view and search for the list of inactive individuals filtered by their first name, last name, and an inactive date range.

### 3.3.1 View and search for Inactive individuals

• Step-1: Click on the 'Individuals' tab and select 'Inactive Customers'.

pennie connecting Pennsylvanians to h	ealth	n coverage"		
Home		Individuals -	My Info	ormation +
Inactiv	e	Pending Requests Active Customers		1 InActive Individual
		Inactive Cus	lomers	

• Step-2: Enter the individual's first name in the 'First Name' field or last name in the 'Last Name' field or enter the desired date range an individual account has been inactive in the 'Inactive Since' section under the "Refine Results By" section and click on the 'Go' button.

Home 🕷 Individuals - My In	nformation +		
Inactive Active Customers	1 InActive Individual		
Refine Results By (reset all)	Name ©	Inactive Since a	
First Name	Kate Upland	11/07/2021	
Last Name			
Inactive Since			
From: mm/dd/yyyy 🗂			
mm/dd/yyyy 🟥 Go			

# 4. My Information

pennie	connecting Pennsylvanians to health coverage <sup>∞</sup>					
	Home 🏶 Individuals 🗸	My Information -				
	Dashboard	Counselor Information My Profile Certification Status Status				
	Quick Links					

# 4.1 Assister Information

The Assister Information Section displays Assister information, which includes individual Assister Information, Mailing Address, and Profile Information. This information can be updated within this Section.

## 4.1.1 Add or update Assister information

• Step-1: Click on 'My Information' tab and select 'Counselor Information'.

pennie connecting Per	nnsylvanians to health coverage"		
	Home 🌴 Individuals 🕶	My Information -	
		Counselor Information My Profile Certification Status	
	Dashboard		
	Quick Links	Status	

• Step-2: Click on the 'Edit' button.

Home 🕷 Individuals - My	Information •			
Olivia Fox				
Steps	Assister Information		Edit	
My Information	First name	Olivia		
Profile	Last name Email	Fox		
Certification Status	Phone number			
Status	Secondary Phone Number How would you like us to contact you?	email		
	Assister Certification #	0000867530		
	Primary Assister Site			
	Secondary Assister Site			

• Step-3: Enter Assister Information (e.g., "First Name" or "Phone Number"), Mailing Address and Profile Information (e.g., "Spoken Languages Supported" or "Written Languages Supported") and click on the 'Save' button.

Ausister Information	
Fital name	Cilivia
Lad name -	Fee
	company@amail.com
Phone number 1	222 232 2252
Secondary Phone Humber	333 232 3232
How would you libr us to contact you?	Email     Phone
	D Mat
Autolog Contification #	0000867530
Primary Autidor Sile	Freds Stars 🗸 🗸
Secondary Assister Sile	Select V
Mailing Address	
Street Address 1	Street Hame, P.O. Ros, Company, c/a
Salle	Apt, Sullo, Unit, Ilidg, Root, elic
City -	City, Town
Silatio -	Penneylvania 💙
7ap Cade	Zip Co
Profile Information	
Spoken Languages Supported (Select all that	□ linglish
obbili) . Prébouse (neuro	natai:
	_ Cambodian
	Cantonese
	5 Himong
	Diana Kanalaria
	Russian
	_ Spanish _ Regulag
	Violnamene
	COBME Loter Dylam
Written Longuages Supported (Select all that	_ English
obbiå).	Avable
	Cambodian
	- Ford
	S Himong
	Russian
	Spanish     Invarian
	Tagalog     Traditional Chinese character
	Veinamete
	Cither Ladaci Rama Options
Education -	High School Gradus 💙
Upload Photo	Choose File No file chosen File size limit is 5 MB.
	Creat See
	Cancel Save

## 4.2 Profile

For detailed information on the Assister Profile please refer to Section 2.2.

## 4.3 Certification Status

The Certification Status section provides a read-only listing to Pennie Assister Number, Certification Status, Assister Certification Number, Assister Start Date, Certification Renewal Date, and Activity Status.

**PLEASE NOTE:** The Certification Status of an Assister must be "Certified" to gain access to the Assister portal and the Activity status must be "Active" to appear in the "Find Local Assistance" directory tool.

There are three possible Certification Statuses for the Assisters, which are described below:

### Pending

The Pending status is the default status assigned to a new Assister whose account has been created by their Entity Organization on the Pennie platform and the Entity administrator is reviewing their information.

### **Certified**

The Certified status is assigned once the Entity administrator has verified the Assister information. Only an Assister with Certified Status can have full access to the Assister portal.

### Denied

The Denied Certification Status is assigned when an Assister's certification is rejected.

There are two Activity Statuses for the Assisters, which are described below:

### **Active**

The Active status is assigned to an Assister by the Entity Organization or Entity administrator. An Assister with active status will be listed in Pennie's "Find Local Assistance" directory tool, which is used by customers to locate Assisters in their area. The Assister will appear in the Assister search list which is used by the Entity to change customer delegation from one Assister to another Assister within the Entity Organization.

### **Inactive**

The Inactive status is assigned to an Assister by the Entity Organization or Entity administrator. An Assister with an Inactive status won't be listed in Pennie's "Find Local Assistance" directory tool, which is used by customers to locate Assisters in their area. The Assister will not appear in the Assister search list which is used by the Entity to change customer delegation from one Assister to another Assister within the Entity Organization.

beuute, course	cting Pennsylvanians to health coverage"		*	8	Help & Support +	My Account+
	Home # Individuals - My In	formation +				
	Olivia Fox					
		Certification Status				
	My Information Profile	Assisters Number 3030003049 Certification Status Certified Assister Certification Number 0000697530				
	Contrification Status	Assister Start Date 01-25-2020 Cartification Research Date 03-25-2021 Activity Status Active				

# **Document Revision History**

Version	Issue Date	Changes	Drafted	Approved
2.0	09/01/2022	Revised Guide for OEP 2023	Scott Yeager	09/26/2022